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Global Leadership Competencies in Selected Adult Education Graduate Programs from the United States and Western Europe

Arthur Ray Mccrory

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Global Leadership Competencies in Selected Adult Education Graduate Programs from the United States and Western Europe

by

Arthur Ray McCrory, Jr.

A dissertation submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Curriculum and Instruction with an emphasis in Adult Education Department of Leadership, Counseling, Adult, Career, and Higher Education College of Education University of South Florida

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Keywords: leadership development, appreciative inquiry, qualitative, iterative analysis, multiple case study

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Dedication

This work is dedicated to my mom, Frances—my hero. I miss you.

And to my dad, Arthur, and my grandparents—all of whom have passed on, you live on in my passion for learning and my endeavor to be the best man I can be. You have always been beacons of light and inspiration throughout my travels, both outward and inward. I am truly blessed.
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At home, to Greg, my partner in life—thank you for believing in me as I completed this dream. You inspire me every day. Finally, I have the most wonderful sisters a big brother could ever hope for. Chantay and Lea Anne, I love you more than I can ever express. Onward now with a sense of wonder and laughter and faith. God is good.
# Table of Contents

List of Tables .................................................................................................................. viii

List of Figures .................................................................................................................. x

Abstract ............................................................................................................................ xi

Chapter 1: Introduction .................................................................................................... 1
  Statement of the Problem ................................................................................................. 2
  Purpose of the Study ......................................................................................................... 5
  Research Questions ......................................................................................................... 6
  Significance of the Study ................................................................................................. 7
  Conceptual Framework ..................................................................................................... 9
    Bird’s (2013) Framework of Nested Global Leadership Competencies..... 9
    Business and Organizational Acumen ................................................................. 9
      Vision and Strategic Thinking ................................................................. 9
      Business Savvy .......................................................................................... 9
    Managing Communities .................................................................................. 10
    Organizational Savvy .................................................................................. 11
    Leading Change ........................................................................................ 11
  Managing People and Relationships ........................................................................... 11
    Valuing People ........................................................................................ 11
    Interpersonal Skills ............................................................................... 11
    Cross-cultural Communication ........................................................................... 12
    Empowering Others ............................................................................... 12
    Teaming Skills ..................................................................................................... 12
  Managing Self .............................................................................................................. 12
    Resilience ................................................................................................ 12
    Character ................................................................................................ 13
    Inquisitiveness ........................................................................................ 13
    Global Mindset ............................................................................................ 13
    Flexibility .................................................................................................. 13
  Limitations .................................................................................................................. 14
  Delimitations .............................................................................................................. 15
  Definitions of Terms ................................................................................................. 15
  Role of the Researcher ............................................................................................... 17
  Organization of the Study ........................................................................................... 18

Chapter 2: Literature Review ......................................................................................... 20
  Global Leadership .................................................................................................. 20
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining Global Leadership</td>
<td>21</td>
</tr>
<tr>
<td>The Distinction Between Global Leadership and Traditional Leadership</td>
<td>23</td>
</tr>
<tr>
<td>Global Leadership Competency Literature</td>
<td>26</td>
</tr>
<tr>
<td>Global Leadership Competency Study Selection Process</td>
<td>27</td>
</tr>
<tr>
<td>Global Leadership Competency Studies</td>
<td>28</td>
</tr>
<tr>
<td>Global Leadership Triad</td>
<td>28</td>
</tr>
<tr>
<td>Global Literacies</td>
<td>29</td>
</tr>
<tr>
<td>Global Leadership Dimensions</td>
<td>31</td>
</tr>
<tr>
<td>Pyramid Model of Global Leadership</td>
<td>31</td>
</tr>
<tr>
<td>Integrated Framework of Global Leadership Competencies</td>
<td>34</td>
</tr>
<tr>
<td>The Global Leader of Tomorrow</td>
<td>35</td>
</tr>
<tr>
<td>Content Domain of Intercultural Competence in Global Leadership</td>
<td>36</td>
</tr>
<tr>
<td>Framework of Nested Global Leadership Competencies</td>
<td>37</td>
</tr>
<tr>
<td>Business and Organizational Acumen</td>
<td>38</td>
</tr>
<tr>
<td>Managing People and Relationships</td>
<td>39</td>
</tr>
<tr>
<td>Managing Self</td>
<td>39</td>
</tr>
<tr>
<td>Summary of Global Leadership Literature</td>
<td>41</td>
</tr>
<tr>
<td>Adult Education Graduate Programs and Global Leadership</td>
<td>42</td>
</tr>
<tr>
<td>Conceptual Framework for Development of Interview Protocol</td>
<td>45</td>
</tr>
<tr>
<td>Appreciative Inquiry (AI)</td>
<td>45</td>
</tr>
<tr>
<td>Affirmative Topic Choice</td>
<td>46</td>
</tr>
<tr>
<td>Positive Core</td>
<td>46</td>
</tr>
<tr>
<td>Summary</td>
<td>47</td>
</tr>
<tr>
<td>Chapter 3: Methods</td>
<td>49</td>
</tr>
<tr>
<td>Research Questions</td>
<td>49</td>
</tr>
<tr>
<td>Research Design</td>
<td>50</td>
</tr>
<tr>
<td>Case Selection</td>
<td>53</td>
</tr>
<tr>
<td>Instrument</td>
<td>54</td>
</tr>
<tr>
<td>Interview Protocol Development</td>
<td>55</td>
</tr>
<tr>
<td>Data Collection</td>
<td>57</td>
</tr>
<tr>
<td>Interviews</td>
<td>58</td>
</tr>
<tr>
<td>Field Notes</td>
<td>60</td>
</tr>
<tr>
<td>Researcher’s Reflective Journal</td>
<td>61</td>
</tr>
<tr>
<td>Supporting Documents</td>
<td>62</td>
</tr>
<tr>
<td>Data Analysis</td>
<td>62</td>
</tr>
<tr>
<td>Thematic Analysis</td>
<td>63</td>
</tr>
<tr>
<td>Microanalysis</td>
<td>63</td>
</tr>
<tr>
<td>Within-case Analysis</td>
<td>64</td>
</tr>
<tr>
<td>Cross-case Analysis</td>
<td>64</td>
</tr>
<tr>
<td>Constant Comparison</td>
<td>66</td>
</tr>
<tr>
<td>Coding</td>
<td>66</td>
</tr>
<tr>
<td>Validation Procedures</td>
<td>67</td>
</tr>
<tr>
<td>Construct Validity</td>
<td>68</td>
</tr>
</tbody>
</table>
### Internal Validity
*Triangulation* ................................................................. 69
*Member Checks* .................................................................. 70
*Audit Trail* ......................................................................... 70
*Peer Reviews* ....................................................................... 71

### External Validity/Transferability
*Reliability* ........................................................................... 73

### Ethical Considerations
*Summary* ............................................................................... 73

### Chapter 4: Presentation of the Cases
*Profiles of the Cases* .......................................................... 74

#### Case 1: Metropolitan Global University (MGU)
*Overview of Case 1* ............................................................ 77
*Participants for Case 1* ......................................................... 78
*Synopsis of the Opening Interview Questions* .................... 80
*Synopsis of the Global Leadership Competencies* ............... 87
  *Managing Self* ................................................................. 87
  *Managing People and Relationships* ................................. 90
  *Business and Organizational Acumen* ......................... 93

#### Case 2: All-embracing State University (AESU)
*Overview of Case 2* ............................................................ 102
*Participants for Case 2* ......................................................... 104
*Synopsis of the Global Leadership Competencies* ............... 106
  *Managing Self* ................................................................. 106
  *Managing People and Relationships* ................................. 114
  *Business and Organizational Acumen* ......................... 120

#### Case 3: Approaching-goals University (AGU)
*Overview of Case 3* ............................................................ 128
*Participants for Case 3* ......................................................... 129
*Synopsis of the Opening Interview Questions* .................... 131
*Synopsis of the Global Leadership Competencies* ............... 139
  *Managing Self* ................................................................. 139
  *Managing People and Relationships* ................................. 143
  *Business and Organizational Acumen* ......................... 149

#### Case 4: Community-focused State University (CFSU)
*Overview of Case 4* ............................................................ 156
*Participants for Case 4* ......................................................... 158
*Synopsis of the Opening Interview Questions* .................... 159
*Synopsis of the Global Leadership Competencies* ............... 170
  *Managing Self* ................................................................. 170
  *Managing People and Relationships* ................................. 174
  *Business and Organizational Acumen* ......................... 178

#### Case 5: German Research City University (GRCU)
*Overview of Case 5* ............................................................ 186
*Participants for Case 5* ......................................................... 187
Student Agency ................................................................. 276
Teaching Practices .......................................................... 276
Managing People and Relationships ........................................ 277
Valuing People ................................................................. 277
  Conditional Positive Regard ............................................. 277
  Importance of Student Voice ............................................ 278
  Capacity for Collaboration .............................................. 278
  Teaching Practices ....................................................... 278
Cross-cultural Communication ........................................... 279
  Student Demographics .................................................. 279
  Program Support .......................................................... 279
  Teaching Practices ....................................................... 281
Interpersonal Skills .......................................................... 281
  Building Affective Capital .............................................. 281
  Teaching Practices ....................................................... 283
Teaming Skills ............................................................... 283
  Working in Teams Necessary .......................................... 283
  Structured Support ....................................................... 284
  Teaching Practices ....................................................... 284
Empowering Others .......................................................... 284
  Student-claimed Power .................................................. 284
  Teaching Practices ....................................................... 286
Business and Organizational Acumen .................................... 286
Vision and Strategic Thinking ............................................ 287
  Pragmatic for Career in Adult Education ........................... 287
  Teaching of Theory Only ............................................... 288
  Neo-liberal Economics .................................................. 288
  Programmatic Visioning ............................................... 289
  Teaching Practices ....................................................... 289
Leading Change .............................................................. 289
  Fundamental Human Capacity ........................................... 290
  Continuous Reflection ................................................... 290
  Teaching Practices ....................................................... 291
Business Savvy ............................................................... 291
  Criticism of Using a Business Model ................................. 291
  Issues in Adult Education Programs .................................. 292
  Teaching Practices ....................................................... 293
Organizational Savvy ........................................................ 293
  Knowledge of Adult Education Institutions ....................... 293
  Student Knowledge Requirements ..................................... 294
  Teaching Practices ....................................................... 295
Managing Communities .................................................... 295
  Building Communities .................................................. 295
  Management in Education ............................................... 296
  Teaching Practices ....................................................... 296
Other Identified Competencies ............................................ 297
Research Question 2: Perceived Importance of the Global Leadership Competencies in the Adult Education Graduate Programs .................................. 299

Research Question 3: Identified Curricular and Co-curricular Practices to Develop Global Leadership Competencies ........................................ 302

Curricular Themes ..................................................... 303
   Embedded Discussions .......................................... 303
   Writing Exercises ................................................ 304
   Selection of Readings/Texts ..................................... 305
   Targeted Assignments .......................................... 305
   Presentations ...................................................... 306
   Teamwork .......................................................... 307
   Self-directed Learning ......................................... 308
   Online Learning .................................................. 308
   Personalized Projects ............................................ 309
   Use of Guest Speakers ......................................... 310
   Innovative Use of Technology .................................. 311

Co-curricular Themes ................................................ 311
   Develop Research Agenda ..................................... 312
   Provide Specific Courses ...................................... 312
   Encourage Attendance at Conferences ...................... 313
   Engage in Mentoring/Advising/Shadowing .................. 314
   Accept more International Students ......................... 314
   Expand Study Abroad .......................................... 315
   Promote Learning Communities .............................. 315
   Coordinate Alumni Support .................................. 316
   Offer Professional Development Opportunities ............ 316
   Encourage Volunteering/Campus Involvement .......... 316
   Awareness at Admissions ...................................... 317

Research Question 4: Identification of Similarities and Differences Among
  Participant Responses ........................................... 317
  Differences .......................................................... 320
     Institutionalization of Education Culture in Germany .. 320
     Irish Passion and Support ..................................... 323
     Italian Professor Ambivalence Towards Students ....... 324
  Similarities ........................................................ 325

Summary of Chapter .................................................. 326

Chapter 6: Summary, Conclusions, Implications, and Recommendations .......... 327
   Summary .......................................................... 327
   Conclusions ........................................................ 330
   Implications ....................................................... 333
   Recommendations ............................................... 336
   Final Reflections of the Researcher .......................... 338

References .................................................................. 342
List of Tables

Table 1: Categories and Competencies of Bird’s (2013) Framework of Nested Global Leadership Competency Development ......................................................... 10

Table 2: Global Leadership Dimensions With Associated Competencies ........... 32

Table 3: Overview of Jokinen’s (2005) Integrated Framework of Global Leadership Competencies ............................................................................................................. 35

Table 4: Results of Content Analysis of Nine CPAE Standards in 39 Adult Education Graduate Programs Offering Ph.D., Ed.D., or Both Degrees ...... 44

Table 5: Description of Case Study Tactics and Description of the Phase of Research in Which Tactic Occurs for Four Design Tests of Validity and Reliability ....................................................................................................................... 68

Table 6: Overview of Supplemental Peer Reviewer Assignments for Inter-coder Checking of Themes ........................................................................................................ 72

Table 7: Pseudonyms and Location of the Seven Institutions Selected for This Study ........................................................................................................................................ 76

Table 8: Demographics for Case 1 Participants .......................................................................................................................................................... 80

Table 9: Demographics for Case 2 Participants .................................................................................................................................................... 105

Table 10: Demographics for Case 3 Participants ........................................................................................................................................... 131

Table 11: Demographics for Case 4 Participants ........................................................................................................................................... 159

Table 12: Demographics for Case 5 Participants ........................................................................................................................................... 188

Table 13: Demographics for Case 6 Participants ........................................................................................................................................... 223

Table 14: Demographics for Case 7 Participants ........................................................................................................................................... 248

Table 15: Nested and A Priori Categories Used at the Beginning of the Data Analysis With Emergent Categories ................................................................................................................................. 267

Table 16: Overview of Rank Order of Each Participant by Category ..................... 301

Table 17: Frequency Distribution of Ranking of All 15 Competencies by Category .... 302
Table 18: Overview of Emergent Themes Describing Practices from Curricular and Co-curricular Categories Presented in Rank Order of Word Count...... 303

Table 19: Frequency Distribution of Ranking by Category of All 15 Competencies for the Four Cases Located Geographically in the United States........... 318

Table 20: Frequency Distribution of Ranking by Category of All 15 Competencies for the Three Cases Located Geographically in Western Europe ............ 319

Table B1: Representative Definitions of Global Leadership Found in the Literature ... 365

Table E1: List of Validation Panel Participants .......................................................... 369

Table G1: List of Verification Panel Participants ....................................................... 372

Table K1: An Overview of Which Research Questions are Addressed by Which Interview Questions................................................................. 384

Table P1: Supplemental Peer Reviewers ................................................................. 395
List of Figures

Figure 1: Brake’s (1997) global leadership triad model of global leadership competencies ............................................................... 29

Figure 2: Bird and Osland’s (2004) pyramid model of global leadership competencies ......................................................... 33

Figure 3: Diagrammatic overview of study from method selection to data analysis ........................................................................ 52

Figure 4: Schematic representation of the development of the global leadership competency development interview protocol for selected adult education graduate programs ........................................ 59

Figure 5: Overview of the five global leadership competencies perceived to be most important in the selected adult education graduate program across the cases located in the United States and the cases located in Western Europe ........................................................................ 321

Figure 6: Overview of the five global leadership competencies perceived to be less important in the selected adult education graduate program across the cases located in the United States and the cases located in Western Europe ........................................................................ 322

Figure M1: Worksheet to Document the Themes Derived From the Research Questions of the Multiple-case Study ......................................................... 392
Abstract

Researchers in the field of global leadership have reported a growing need for leaders able to perform from a global perspective, and the lack of qualified leadership candidates to fulfill these responsibilities. Adult education graduate programs represent a unique pool of aspirants to help fill this gap. In 2008, the Commission of Professors of Adult Education (CPAE) published *Standards for Graduate Programs in Adult Education*. Two of these standards addressed the incorporation of globalization and leadership studies into the planning, administration, and evaluation of adult education graduate programs. This study sought to explore the connection between the phenomenon of global leadership and the development of competencies, identified by Bird’s (2013) framework of nested global leadership competencies, in seven selected adult education graduate programs in the United States and Western Europe.

The questions that guided this qualitative, multiple case study explored (a) which of the competencies were addressed in the selected adult education graduate programs, (b) which ones were perceived to be most and less important, (c) which curricular and co-curricular practices were identified in the development of these competencies, and (d) what were the similarities and differences between the adult education graduate programs located geographically in the United States and those located in Western Europe.

Findings indicated all of the global leadership competencies were addressed across all seven cases, to varying levels of extent. The competencies of (a) valuing
people, (b) inquisitiveness, (c) leading change, and (d) vision and strategic thinking emerged as most important among the participants across all seven cases, as well as within the two geographical locations. Multiple curricular and co-curricular themes emerged as best practices to facilitate development of the global leadership competencies, although they were primarily associated with good instructional practices discussed within the context of globalizing the curriculum. There was less discussion about the competencies within a unifying construct of leadership development. Similarities across all cases included a focus on student-centered learning, while differences were primarily associated with the independent foci of the adult education graduate programs. Implications of the findings were directed towards the CPAE, university administration, adult education faculty, and adult education graduate students.
Chapter 1

Introduction

In response to the need for an increase in the quality and quantity of leaders in an emerging global context, the field of global leadership has developed from an offshoot of traditional leadership studies into a construct with its own scholarship and literature (Gupta & Van Wart, 2016; Steers, Sanchez-Runde, & Nardon, 2012). In a servant leadership research roundtable at the Regent University School of Global Leadership and Entrepreneurship, Patterson, Dannhauser, and Stone (1997) noted that the rise of multinational organizations, and the resulting need for leadership to fill roles within these organizations, represent the kinds of changes impacted in this era of rapid globalization: “The vast number of offices spread around the world requires these organizations to have leaders with abilities and competencies to lead globally” (p. 1). Oppel (2007) described the call for greater complexity in the leadership pipeline of organizations across the globe, demanding greater effectiveness, adaptability, and commitment from those seeking leadership roles in the global workforce. Mendenhall and Bird (2013) stated that despite many important principles, processes, and practices provided by researchers over this timeframe, there is still a disconnect between critical factors for developing global leadership and the practices utilized in organizations throughout the world.

The global perspective required of leaders today differs from leaders of the past (Patterson et al., 1997). Whether in the field of education, training, business,
government, or non-profit organizations, today’s global economy requires an awareness of issues and trends from a global mindset in order to find success in the current workforce (Goldsmith, Greenburg, Robertson, & Hu-Chan, 2003). Terms such as cultural competency, global mindset, and global citizen are commonplace in today’s leadership development models (Livermore, 2010), and represent the shift from the need for competency only in one’s particular area of expertise to a need for competence in a transnational, cross-cultural context. As Oppel (2007) stated, “Global businesses in the future will require leaders to be like explorers, guiding their organizations through unfamiliar and turbulent environments. With markets, suppliers, competitors, technology, and customers around the world constantly shifting, traditional leadership models no longer work” (p. 8).

**Statement of the Problem**

Mendenhall and Bird (2013) described the growing need for a workforce which is able to perform individual roles from a global perspective, regardless of the position held within an organization. Similarly, Osland (2008a) emphasized the imperative for effective leadership within today’s complex, global workforce. Peters and Gitsham (2010) underscored the importance that education strategies and leadership development have in meeting these challenges. Global strategies necessitate the need to develop leaders with unique competencies and perspectives for success in this expanding global environment (Suutari, 2002). Additionally, the advancing pace of technology—intertwined with the increased volatility, complexity, ambiguity, and cultural diversity required of today’s workforce—emphasizes the need for quality leaders in a global context (Hoppe, 2007). As the globalized economy creates a more multifaceted
and dynamic work environment, members of the new workforce must find ways to compete effectively while fostering an expanding worldview (O’Dell & Hwang, 2008). Graduates need to leave their graduate programs with the mental, emotional, and behavioral wherewithal to successfully compete in this continuously evolving global setting (Cabrera & Unruh, 2012). The need for educators in general—and adult educators in particular—to incorporate high quality global competency development initiatives into the training and curriculum of their student populations is paramount (Caligiuri, 2006).

A Rand Corporation study in 2003 predicted a deficiency in the number of U.S. global leaders across public, private, and non-profit sectors (Bikson & Law, 2003). Suutari (2002) also noted the shortage of a globally competent workforce, further stating that the limitation is in human resources rather than inadequate capital which hinder global organizational success. Colleges and universities provide numerous opportunities in terms of growing the needed pool of culturally competent leaders within a global context (Osland, 2008a), and higher education has always embraced the task of producing industrious, conscientious citizens (Gehrke, 2008). The majority of global leadership development in higher education has focused on Master of Business Administration (MBA) programs, yet according to Mendenhall et al. (2013), the requirement for global leadership has expanded into every industry and field of study. Growth in situations where global workers collaborate cross-culturally within international frameworks is both unprecedented and intensifying (Dickson, Castano, Magomaeva, & Den Hartog, 2012).
According to Friedman and Mandelbaum (2011), any examination of global leadership necessitates further exploration of the ways in which globalization affects every aspect of society. Globalization refers to the integrated and interdependent nature of the world’s economy, culture, political agendas, and educational systems (Friedman & Mandelbaum, 2011). Together with this emerging need for leadership with a more global perspective, globalization highlights the need for all organizations to examine and explore ways in which they can successfully develop personnel with identified global leadership competencies (Bird, 2013; Mendenhall, 2013). In fact, the standards for adult education graduate programs—published by the Commission of Professors of Adult Education (CPAE)—include both “the study of leadership, including theories or organizational leadership, administration and change” (CPAE, 2008, p. 9) and the “analysis of globalization and international issues or perspectives in adult education” (CPAE, 2008, p. 9). The complete 2008 CPAE Standards are included in Appendix A. This study examined the extent to which global leadership competencies, as defined by Bird’s (2013) framework, are addressed in adult education graduate programs. This study focused on faculty who are preparing professionals who will put global leadership competencies into action or who will educate future global leaders. It attempted to bridge the gap in knowledge between the growing need for global leaders in a plethora of industries and organizations worldwide (Hoppe, 2007; Mendenhall & Bird, 2013) and higher education offered in adult education graduate programs.

According to Mendenhall et al. (2013), much more research is required in all areas of global leadership, including the links between global leadership competencies and the development of global leaders. Institutions of higher education provide a
unique starting place to develop these competencies (Gehrke, 2008). Merriam and Brockett (2007) discussed how graduate degrees in adult education are among the most practical—and adaptable—in all of higher education. Furthermore, Hoppe (2007) posited that adult learning theory may be a catalyst to boost global leadership competency development. Hoppe (2007) postulated the view that "the existence of predictable stages of development and increasingly complex levels of understanding of ourselves and the world in which we live, [broadens] our behavioral repertoire, and widens our inclusiveness of those who are different from us" (p. 21). Global leadership competency development within adult education graduate programs can provide a boost to the human resource issues facing global organizations in every field in the marketplace. Until this study, there had been no empirical research that explored the extent to which global leadership competencies are addressed and developed in adult education graduate programs.

**Purpose of the Study**

The purpose of this research was to examine the extent to which global leadership competencies are addressed and developed in selected adult education graduate programs in the United States and Western Europe. Central to this study was the concept of global leadership competencies. Bird’s (2013) framework of nested global leadership competencies was used to explore the content domain of the research questions. An exploration of which competencies were addressed and which were not addressed within the curricular and co-curricular components of the selected adult education graduate programs was undertaken. The research also inquired about the perceived importance of the identified global leadership competencies from faculty
members and departmental administration. A further objective of the study was to
describe reported practices of global leadership competency development within the
selected adult education graduate programs. Finally, the study reported the discoveries
regarding similarities and differences in approaches to global leadership competency
development of the selected adult education graduate programs between United States
and Western Europe.

A phenomenological design was best suited to reveal the lived experiences of
faculty and administration in adult education graduate programs (Tracy, 2013).
Phenomenological research, as a subset of qualitative research, focuses on the “lived
meaning of the phenomena it investigates” (Garza, 2007, p. 313). Cerbone (2006)
described the benefits of a phenomenological design as one that provides a framework
to examine the structure of the phenomena being studied without regard to the
causation of the experience. In this study, the phenomena under inquiry were global
leadership competencies as defined by Bird’s (2013) conceptual framework. The multi-
case study design allowed for an exploration into the lived meaning of the interviewees
at multiple settings with regards to these phenomena.

Research Questions

To accomplish the purpose of this phenomenological, exploratory study, the
following research questions were addressed:

1. Which global leadership competencies are addressed in the selected adult
   education graduate programs in the United States and Western Europe?
2. Which global leadership competencies are perceived to be the most important by
   faculty and administration of the selected adult education graduate programs in
the United States and Western Europe? Similarly, which global leadership competencies are perceived to be less important by the interviewees?

3. What are the reported practices to develop global leadership competencies in the selected adult education graduate programs in the United States and Western Europe?

4. Based on the researcher's analysis of the data, what are the similarities and differences in the development of global leadership competencies between the selected adult education graduate programs in the United States and those of Western Europe?

**Significance of the Study**

As the organizational environment across the globe has increasingly required a more globally competent workforce, new strategies, practices, and research needs have appeared (Mendenhall et al., 2013). It has been estimated that the competition for top leadership and management talent in global organizations will continue to intensify well into the 21st century (Gundling, Hogan, & Cvitkovich, 2011). There is a shortage of global leaders at a time when international exposure and experience are vital to business training and academic success (Hames, 2007; Mendenhall, Reiche, Bird, & Osland, 2013). Internationally minded, globally literate leaders are needed at a time when leadership styles are in transition around the world (Rosen, Digh, Singer, & Philips, 2000). Youssef and Luthans (2012) stated that good leadership creates opportunity for growth, and leading people through change is one of the most important challenges facing today's graduates entering the workforce. According to Osland (2008b), roadblocks exist everywhere, and a new cadre of globally competent leaders is
needed who understand both themselves and others—leaders who are comfortable working around the many cultural barriers that threaten to divide the global workforce. Terrell and Rosenbusch (2013) stated "our scarcest resource is globally competent leadership" (p. 45).

Bolman and Deal (2008) discussed how graduate programs can provide a source for the new leaders required by these increasing challenges. Specifically, adult education graduate programs prepare students for careers in adult education fields such as business and industry trainers, higher education faculty, literacy education, independent training consultants, educational program writers and evaluators, individuals with special consulting skills and interests, or community or organizational leadership positions (Merriam & Brockett, 2007). Additionally, global media, international travel, and information technology link people instantly to one another. From Bratislava to St. Petersburg, from Abu Dhabi to Brasilia, globalization is the new international system shaping domestic and international politics, trade, education, and culture (Friedman, 1999). The process of globalization, however, is dynamic and ongoing. Within graduate programs, the organizational frames of structure, politics, human resources, and symbolism are creating a new organizational theory that creates corporate cultures characterized less by bureaucracy than cross-cultural, transnational teamwork (Bolman & Deal, 2008). Globalizing growth, international mega-mergers, economic interdependence, privatizing power, European integration, ethnic conflicts, and demographic dilemmas are but a few of the global trends graduates will face (Rosen et al., 2000) as they leave the confines of academia and enter the marketplace, regardless of their career trajectory.
Conceptual Framework

The model that served as the content domain for the interview protocol and the data collection and analysis was Bird’s (2013) framework of nested global leadership competencies.

**Bird’s (2013) framework of nested global leadership competencies.** In this model, Bird (2013) systematically evaluated the literature from the early 1990s and categorized over 160 competencies from over 20 previous studies and literature reviews, placing each competency into one of three broad categories. Bird further consolidated the semantic differences and arrived at 15 competencies—five within each category. Table 1 presents Bird’s competencies placed within the following three categories: (a) competencies of business and organizational acumen, (b) competencies of managing people and relationships, and (c) competencies of managing self.

**Business and organizational acumen.** The following competencies are associated with this broad category: (a) vision and strategic thinking, (b) business savvy, (c) managing communities, (d) organizational savvy, and (e) leading change.

**Vision and strategic thinking.** This competency is characterized by three primary skills. First is the ability to understand and act in complex and strategic settings, characterized by dimensions such as intellectual intelligence, short- and long-term thinking, and seeing the interdependent aspects of strategic thinking. Second is the development and articulation of a global vision for an organization. The final skillset involves the development and implementation of strategic plans (Bird, 2013).

**Business savvy.** Characterized as "primarily a knowledge-based competency" (Bird, 2013, p. 89), this competency encompasses three dimensions as well, including
two types of knowledge and an attitude. The two types of knowledge are general business savvy and technically oriented knowledge. The attitude is described by Bird (2013) as a value-added orientation incorporating entrepreneurialism and creativity.

Table 1

Categories and Competencies of Bird’s (2013) Framework of Nested Global Leadership Competency Development

<table>
<thead>
<tr>
<th>Business and Organizational Accumen</th>
<th>Managing People and Relationships</th>
<th>Managing Self</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision and strategic thinking</td>
<td>Valuing people</td>
<td>Inquisitiveness</td>
</tr>
<tr>
<td>Leading change</td>
<td>Cross-cultural communication</td>
<td>Global mindset</td>
</tr>
<tr>
<td>Business savvy</td>
<td>Interpersonal skills</td>
<td>Flexibility</td>
</tr>
<tr>
<td>Organizational savvy</td>
<td>Teaming skills</td>
<td>Character</td>
</tr>
<tr>
<td>Managing communities</td>
<td>Empowering others</td>
<td>Resilience</td>
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</table>

Managing communities. This competency centers on global leaders’ ability to succeed within the vast network of relationships required in today’s global workforce, “from buyers to suppliers to competitors to shareholders to non-governmental entities and interest groups” (Bird, 2013, p. 89). Three dimensions of this competency include skills to (a) span boundaries, (b) influence stakeholders, and (c) accomplish strategic objectives.
Organizational savvy. This competency consists of two dimensions, including the ability “to design organizational structures and processes in ways that facilitate global effectiveness” (Bird, 2013, p. 90) and to perform effectively within an organization.

Leading change. Global change efforts are complex and difficult to control (Conger & Ready, 2004). Additionally, resistance to change in an organization is to be expected (Beechler & Javidan, 2007). Yet, Bird (2013) argues the final competency in this category results from the instrumental application of all previous competencies. “The primary thrust of global leadership is to bring about change” (p. 90).

Managing people and relationships. The following competencies are associated with this broad category: (a) valuing people, (b) interpersonal skills, (c) cross-cultural communication, (d) empowering others, and (e) teaming skills.

Valuing people. Bird (2013) describes this competency as “foundational in that all other competencies can be viewed as predicated on it” (p. 91). It encompasses three distinctive dimensions: (a) showing respect for people and their differences, (b) understanding the emotions and motivations of others on a deeper level, and (c) creating and maintaining trusting relationships.

Interpersonal skills. Whether the myriad of skills are predispositional, attitudinal, cognitive, motivitational, or behavioral, Bird (2013) argues that they all fit within two broad dimensions. The first dimension is emotional intelligence, including sensitivity, engagement, and self-awareness. Next are relationship management skills, including such behaviors as influencing, listening, and using relationships for result-oriented purposes.
Cross-cultural communication. This broad competency “entails a high level of mindfulness” (Bird, 2013, p. 92) and can be divided into two components: (a) general cultural awareness—both of one’s own culture as well as the culture of those with whom the global leader works, and (b) specific cognitive and behavioral skills in an intercultural context—including foreign language skills, negotiating, and communication skills.

Empowering others. According to Bird (2013), this competency addresses talents such as motivating direct reports, colleagues, and superiors by increasing self-efficacy within the relationships. It also incorporates skills related to coaching, instructing, personal and professional development, and delegation of authority.

Teaming skills. Globalization has shown that teamwork has been an energizing force for positive innovation (Friedman, 1999). Whether in a small business, a major corporation, a nonprofit, a city, or a country, teamwork is the key to growth and innovation in the future (Friedman, 1999). The final competency under this category refers to (a) working effectively in multicultural and global teams, as well as (b) being able to both lead and take subordinate roles in global teams (Bird, 2013).

Managing self. The competencies associated with this category include (a) resilience, (b) character, (c) inquisitiveness, (d) global mindset, and (e) flexibility.

Resilience. This competency “refers to a set of dimensions that relate to a global leader’s ability to cope with the highly stressful challenges of leading across multiple time zones, large distances, myriad cultures, and widely varying national . . . systems” (Bird, 2013, p. 93). It is characterized by (a) predispositional dimensions of optimism, hardiness, and stress-reduction; (b) attitudinal facets such as resourcefulness and self-
confidence; and (c) behavioral skills such as healthy lifestyle choices (exercise, medication, proper rest, nutrition) and work-life balance.

**Character.** This competency contains the greatest number of possible dimensions in the literature. Bird (2013) narrows the description down to an “admixture of integrity, maturity, and conscientiousness” (p. 94). Further words used throughout the literature to describe this competency include, but are not limited to, honesty, self-awareness, clarity of personal values, measured sense of one’s place in the world, accountability, responsible for one's actions, persistence, tenacity, and persevering through difficult times.

**Inquisitiveness.** This competency refers to “an innate curiosity, an openness to learn, and humility” (Bird, 2013, p. 94). Bird (2013) argues inquisitiveness is the most essential personal quality of global leaders. Openness to new ideas, experiences, and people naturally evolve from this trait. Finally, the facet of humility means not letting pride or self-consciousness interfere with the learning process; in short, allowing oneself to be taught by others.

**Global mindset.** This cognitive competency reflects the complex melding of new perspectives, attitudes, and knowledge within a global context. Bird (2013) breaks global mindset down into two facets: (a) cognitive complexity, specifically a “highly contextualized, multifaceted, multilayered approach to the environment” (p. 95); and (b) cosmopolitanism, or interest in and knowledge of the greater world.

**Flexibility.** This final competency of managing self “involves willingness to adapt and adjust to varied situations” (Bird, 2013, p. 95). Bird (2013) describes both a cognitive and a behavioral component. The cognitive component is intellectual
flexibility, marked by a tolerance for ambiguity; while the behavioral component is behavioral flexibility, indicating a willingness to adapt behaviors to fit the demand of the situation.

By sorting and organizing the complex original list of over 160 competencies down to 15, and ordering them into three broad categories, Bird’s (2013) framework of nested global leadership competencies incorporates multifaceted competencies spanning pre-dispositional, attitudinal, cognitive, behavioral, and knowledge aspects. The continuing challenge for researchers and practitioners is learning how to instigate development models so that as many of these competencies as possible can be incorporated into training programs.

**Limitations**

The researcher identified several possible limitations with the study. First, causal connections cannot be inferred to other cases, because there is always the possibility of alternative explanations (Yin, 2014). The generality of the findings in case study research can be unclear. A case study involves the behavior and situational constrictions of one person, one group, or one organization (Tracy, 2013). Though a multiple case study improves the validity of the findings, the limitations to the generalizability of these units of analysis may or may not reflect the behavior of similar departments (Stake, 2006). Findings may be suggestive of what may be discovered in similar organizations, but without further research this cannot be categorically stated.

This study was also limited by the access to personnel and supporting documents provided by those being studied. The data collected from the interviews are
self-reported; therefore, the validity of the responses depends on the forthrightness of those interviewed (Yin, 2014).

Finally, the qualitative research design includes fundamental limitations in its interpretability (Creswell, 1998). The study’s exploratory data collection method included 12 semi-structured interviews, including two additional interviews during the field test of the interview protocol, and presents challenges in its generalizability to the total adult education graduate program population.

**Delimitations**

The delimitations of a study are those characteristics that arise from the scope of the study, including the defining boundaries and the conscious exclusionary and inclusionary decisions made during the design of the study (Wiersma & Jurs, 2008). The scope of this study was defined by several parameters.

First, this study explored global leadership competency development only in selected adult education programs in the United States and Western Europe. Next, only adult education graduate programs from universities with clearly articulated global emphasis in their overall strategic plans or other published documentation were selected for this study. Also, all interviews were conducted and analyzed in the English language, so all participants or designated translators from the selected adult education graduate programs must have had fluency in both written and spoken English. Finally, the study relied on the perspective of the faculty only. Perspectives from students and other personnel was beyond the scope of this study.

**Definitions of Terms**

The operational definitions of terms used within this study are as follows:
A priori codes. A priori codes are developed before examining the current data at hand. They often are derived from previous literature or existing frameworks (Tracy, 2013). For the purpose of this study, the 15 competencies associated with Bird’s (2013) framework of nested global leadership competencies served as a priori categories for the first level of analysis of the data.

Adult education. The practice of systematic and sustained learning activities by adults in order to gain new forms of knowledge, skills, attitudes, or values (Merriam & Brockett, 2007). For the purposes of this study, it refers to the academic discipline in higher education settings.

Adult education graduate program. A program within institutions of higher education where learners study the practice of teaching adults (Gradschools.com, 2014). For the purpose of this study, it refers to the selected graduate programs in the United States and Western Europe that met the requirements for inclusion in this multiple case study.

Culture. Shared motives, values, beliefs, and identities resulting from common experiences of people from the same group and which is transmitted across generations (House, Javidan, Hanges, & Dorfman, 2002).

Global. Pertaining to the whole world, rather than limited or provincial in scope (dictionary.com, 2014).

Global leader. An individual who affects positive change through organizational arrangements and processes involving cross-boundary stakeholders and multiple cultures characterized by cognitive, affective, geographical, and cultural complexity (Mendenhall, 2008).
Global leadership. The ability to inspire and influence the thinking, attitudes, and behavior of people representing diverse cultural and institutional systems (Mendenhall, 2008).

Global leadership competency. Leadership skills, behaviors, and knowledge that contribute to superior performance in the global context (Bird, 2013). For research questions in this study, global leadership competency referred to the 15 competencies delineated by Bird’s (2013) framework of nested global leadership competencies.

Multiple case study. A variant of a case study, which seeks a deeper understanding of specific instances of a phenomenon within two or more settings and observations of the same phenomenon (Stake, 2006; Yin, 2014).

Western Europe. For the purposes of this study, the generalized geographical area—Germany, Italy, Ireland—where the selected adult education graduate programs are located.

Role of the Researcher

Over a 15-year period, the researcher visited 32 countries. From the rain forests of Brazil to a Romany village in the Tatra mountains of northern Slovakia; from Mount Fuji in Japan to the pyramids outside Cairo, Egypt; from the beaches of the Philippines to the city alleys of London, Portugal, Madrid, Copenhagen, Amsterdam, and Berlin—the researcher built connections with a diverse collection of people. Through these experiences, one question remained: Can formal education be a part of the solution for creating more globally competent leaders able to succeed in such a complex environment?
Travel and cultural contact are not only a part of the journey towards becoming a global citizen, but it teaches one as much about one’s own culture as it does the cultures visited (Livermore, 2010). In conducting interviews with department chairs and faculty members of the adult education graduate programs in different countries, the researcher gained a broader insight into the path his own culture has taken towards global leadership competency development.

Livermore (2010) described the global experiences of each person seen through his or her own unique cultural lens. For example, the author describes how in the United States, a future-focused, short-term, action-oriented society generates a culture of liberty and freedom, with direct, verbal problem solvers committed to learning. This lens influences how one sees the world. On the other hand, Europe is characterized as a land in transition with unprecedented economic and political convergence (Rosen et al., 2000). With a cultural history of intellectualism and social responsibility, the European Union’s healthy respect for tradition is being balanced with an eye for the future. The researcher appreciated the opportunity to explore this dynamic transition through this exploratory study, discovering themes in which the past and future are coming together in the modern curriculum of adult education graduate programs in Western Europe, while comparing these data with results from institutions in the United States in order to help describe the ideal graduate school model of global leadership competency development.

**Organization of the Study**

Chapter 1 introduces the study, presenting the statement and purpose of the problem, the research questions, significance of the study, and a discussion of the
conceptual framework. This is followed by the limitations and delimitations of the study, definition of terms, the role of the researcher, and organization of the study. Chapter 2 reviews and evaluates pertinent literature related to this study. The literature reviewed for this study includes three major strands: (a) global leadership, (b) global leadership competencies, and (c) adult education graduate programs and global leadership. Other sections include the conceptual framework for the development of the interview protocol and a summary. Chapter 3 details and provides a rationale for the research methods used in this study. This includes the research questions, research design, development of the interview protocol, data collection process, the data analysis procedures, ethical considerations, and a summary. Chapter 4 presents the profiles of the cases and a summary of the chapter. Chapter 5 discusses the thematic analysis of the findings of the cross-case analysis conducted on the data and answers the four research questions and a summary. Chapter 6 includes a summary, conclusions, implications, recommendations for further research and a final reflection of the researcher.
Chapter 2

Literature Review

The purpose of this study was to explore the extent to which global leadership competencies are addressed and developed in adult education graduate programs in the United States and Western Europe. This chapter is divided into three parts. First is a discussion of the challenges facing global leadership scholarship and what differentiates global leadership from other constructs of leadership studies, including current findings on the struggle to define terms in the field and the challenge of distinguishing global leadership from traditional leadership. Next is a review of studies which attempt to categorize global leadership competencies into organizing frameworks and developmental models, which are highlighted in this review. Next, in an effort to bridge the gap between organizational and academic development models, this literature review addresses the current position of adult education graduate programs in the role of development of global leadership competencies. Finally, the conceptual framework utilized in the development of the interview protocol is described.

Global Leadership

The literature for the construct of leadership is vast and ever evolving (Osland, 2013). In the seven-volume series Advances in Global Leadership, Ulrich and Smallwood (2012) conclude “Leadership is about who we are, what we do, and what we know; but it is equally about what we deliver” (p. 32). Whether within the individual, the organizational, or spanning the boundaries of relationships across cultures, effective
leaders have a solid handle on the fundamentals. Osland, Bird, and Oddou (2012) carry that observation one step forward, using the analogy of “extreme leadership” to describe global leadership; whereby traditional leadership skills can be honed to the point where the combination of job complexity, a global scope, and developmental demands contribute to a unique global leadership expertise.

Examples of global leaders may have once been associated only with the famous characters of history, such as in the world of politics (Nelson Mandela), spirituality (Mother Theresa), military (General George S. Patton), or business (Bill Gates). However, today’s global leaders represent the increasingly complex, ambiguous, multicultural environment of the everyday global economy: “Our definition of global leadership does not restrict global leaders to an organization’s upper echelon; anyone who leads global change efforts in the public, private, or nonprofit sectors is a global leader” (Osland, 2008, p. 34). The need for global leaders result from businesses and organizations extending their reach globally (Prewitt, Weil, & McClure, 2011).

**Defining global leadership.** In a 2012 special issue of the *Journal of World Business* entitled “Leadership in a Global Context”, Mendenhall et al., (2012) argued that “the lack of a precise, rigorous and commonly accepted definition of global leadership limits the field’s conceptual and empirical progress” (p. 493). The authors noted that over 20 years of scholarship in global leadership has examined such areas as the scope of leadership tasks, determining competencies and organizing frameworks, development of assessment instruments, and description of training programs. These authors claim that the closest any scholar has come to developing an
accepted construct definition of global leadership is Osland, Bird, and Oddou’s (2012) study which sought to determine characteristics of global leaders from a within-organizational perspective. Mendenhall et al. (2012) reviewed and critiqued the literature on global leadership at the time and identified at least 14 different definitions, depending on the scope of the study and the focus of the researcher. Wacker (2004) argued that robust scholarship in theory-building and empirical research requires formal conceptual definitions. Mendenhall et al. (2012) stated, “Without clear and commonly accepted definitions, there is a risk that research domains become increasingly fragmented and lose their ability to develop a common body of knowledge and make sense of potentially conclusive empirical results” (p. 493).

A sample of the definitions found within the global leadership literature is listed in Appendix B. The content within these definitions includes much variation: Different scholars and practitioners at different times have defined global leadership with regards to vision, purpose, behaviors, job responsibilities, target audiences, global components, performance measures, and description of global context (Mendenhall et al., 2012). In fact, Mendenhall and his colleagues found only one agreement among all the definitions: “global leadership is significantly different from domestic leadership due to the salience of the context—characteristics of the global context appear to exert greater influence than is the case for domestic contexts” (p. 494). The authors further classified the list of definitions into descriptions of global leadership as either a state, centering on specific tasks, scope, roles, and responsibilities; or as a process, reaching beyond the goals of the individual leader and focusing on the broader global responsibilities.
embedded in the construct itself. Often, these two dimensions are integrated within a definition proposed by various authors.

**The distinction between global leadership and traditional leadership.** There is a presumption among scholars that research in global leadership represents a complimentary, though alternative line of leadership research (Osland, Bird, & Oddou, 2012). A chapter by Osland and colleagues in *Advances in Global Leadership* reported on empirical work which used a Delphi technique to develop the following list of expectations faced by global leaders:

- greater need for broad knowledge that spans functional and national boundaries;
- strong requirement for wider and more frequent boundary spanning both within and across organizational and national boundaries;
- pressure to understand a wider range of stakeholders when making decisions;
- heightened need for cultural understanding within a setting characterized by wider ranging diversity;
- a more challenging and expanded list of competing tensions both on and off the job;
- heightened ambiguity surrounding decisions and related outcomes/effects; and
- more challenging ethical dilemmas relating to globalization. (Osland et al., 2012, p. 109)

Osland, Bird, & Oddou (2012) further noted four distinctive differences between the research and literature of global leadership and traditional leadership. First, no research has been published that directly compares the two constructs. Second, while *boundary spanning* has been found to be one of the most commonly named competencies within the global leadership literature, Osland noted that in the widely respected review of leadership research by Yukl (2006) no mention of this term is made. Third, “global leadership, as a research area, has multidisciplinary roots that extend outside traditional leadership areas” (Osland, Bird, & Mendenhall, 2012, p. 110). These include the fields of intercultural communication competence, expatriation, global
human resource management, comparative leadership, and systems theory, with each of these constructs having a body of research and literature in their own right. Fourth, empirical research in global leadership has suggested that the developmental path is different than for traditional leadership, with greater emphasis placed on cultural familiarity and transformational experiences.

As Osland, Bird, & Mendenhall (2012) summarized

There is strong prima facie evidence that a meaningful distinction can be made between traditional or domestic leadership and global leadership, and that the difference is firmly rooted in a context that is qualitatively different and, consequently, requires a different skill set and a different developmental approach. (p. 110)

“The term global in global leadership reflects the context in which leadership operates: globalization” (Mendenhall & Bird, 2013, p. 168). Many scholars argue that global leadership is far more complex compared to traditional leadership due to the dynamics of the global context (Mendenhall & Bird, 2013; Osland et al., 2012; Steers et al., 2012). Organizational success is challenged in ever-changing environments, cultures, locale, and socio-political systems that require complicated interdependencies among multiple systems (Gundling et al., 2011; Rosen et al., 2000). As highlighted by Osland et al. (2012), the key characteristic of the global context is complexity: for example,

- multiplicity across a range of dimensions;
- interdependence among a host of stakeholders, sociocultural, political, economic, and environmental systems;
- ambiguity in terms of understanding causal relationships, interpreting cues and signals, identifying appropriate actions and pursuing plausible goals;
- flux in terms of quickly transitioning systems, shifting values and emergent patterns of organizational structure and behavior. (p. 111)
According to Boyacigiller, Beecher, Taylor, and Levy (2004), if global leadership is in fact characterized by leadership under conditions of extreme complexity, then an internal complexity should mirror this global environment—this construct has come to be known as a global mindset, a term Boyacigiller et al. (2004) associate with cognitive complexity and cosmopolitanism. Osland, Bird, and Oddou’s (2012) study published in *Advances in Global Leadership* asked global leaders how they perceive their work context from within their organizations, confirming the complexity reported throughout the literature. The global leaders in Osland et al.’s (2012) study described their work as:

- significantly larger in scope than the usual tasks on which they worked;
- highly complex;
- time-consuming, usually taking months or years beyond what was expected;
- crisis-driven and involving redesigning on a dime;
- intense, in terms of sustained mental focus and time pressures; and
- grueling in terms of the degree of global travel involved.

Mendenhall et al. (2012) state, “The field of global leadership currently confronts both a threat and an opportunity to its potential to evolve and progress” (p. 499). The authors argue that the assumptions each scholar works from regarding the definitions in the field limit the theoretical support to their findings. As can be seen in the next section, the empirical findings of the global leadership literature often produce cross-purposes, and integration of the findings is problematic at best. Mendenhall (2013) refers to this as the problem of Balkanization, otherwise described as the fragmentation of data and findings in often disparate and contradictory results. Yukl (2006) notes the
plethora of fields from which leadership studies arrive, including “anthropology, the arts, business, education, history, international relations, law, military, political science, psychology, religion, and sociology” (p. 2). And more than 20 years ago, Rost (1993) noted that many “one-discipline scholars are easily recognized because they . . . put an adjective in front of the word leadership, such as business leadership, educational leadership, or political leadership” (p. 1). Without a strongly held and accepted construct definition from which scholars can work, the discipline of global leadership may find itself with the same set of challenges. In the next section, a review of the empirical studies attempting to address these issues is presented.

Global Leadership Competency Literature

Osland, Bird, Mendenhall, and Osland (2006) advised researchers to take a critical regard toward the quality of the studies that had taken place within the construct of global leadership, especially in the early years. As with most nascent fields, much of the early literature was exploratory in nature, and some information was extrapolated from literature in the field of domestic leadership, global management, and practitioner experiences. According to Osland (2008, 2013), though valuable, these studies were not definitive, and assumptions regarding construct definitions and competency descriptions are still scattered throughout the literature. Confusion persists regarding concepts, organizing frameworks, and models of development.

and updated that review in the second edition (Mendenhall et al., 2013), reflecting the growing number of empirical studies having occurred over the past few years. The seven-volume *Advances in Global Leadership* series edited by Mobley and various colleagues from 1999–2012 compile current findings and implications for future research. The *Journal of World Business* published a special edition in 2012 entitled *Leadership in a Global Context*. Books written primarily for business practitioners have also contributed to the growing field of global leadership literature (Brown, 2007; Cohen, 2007; Gundling et al., 2011; Hames, 2007; Nirenberg, 2002).

**Global leadership competency study selection process.** This literature review focuses only on literature that meets one of four criteria: (a) the study was undertaken since 1995, setting a time-frame of this review for the past 20 years; (b) the study adds to the body of literature regarding global leadership competencies, which is the primary focus of this research; (c) the study attempts to categorize competencies into an organizing framework, leading up to the framework selected for this study; or (d) the study attempts to describe a global leadership developmental model, so that comparisons with the development of global leadership competencies in adult education graduate programs can be identified.

Twenty-seven publications were reviewed. Some were published in peer-reviewed journals, while others were published as stand-alone books or book chapters. Of these 27 studies, eight are highlighted here as attempts to provide an organizing framework or model for the 160+ global leadership competencies delineated throughout the literature. These include two literature reviews (Jokinen, 2005; Mendenhall & Osland, 2002) and six models (Bird, 2013; Bird, Mendenhall, Stevens, & Oddou, 2010;
Bird & Osland, 2004; Brake, 1997; Peters & Gitsham, 2010; Rosen et al., 2000). A chronological approach will be undertaken, though a synthesis will be conducted at the end when describing the specific framework selected for use in this research, Bird’s (2013) framework of nested global leadership competencies.

**Global leadership competency studies.** The identification of a core set of global leadership competencies has proven to be a difficult task, and researchers and practitioners alike have struggled not only with coming up with a comprehensive set, but also with organizing them into a useable framework (Bird & Osland, 2004). The following six studies and two published literature reviews meet the requirements for inclusion in this review. In addition to providing a developing list of global leadership competencies, they also provide a framework for the organization of these competencies.

**Global leadership triad.** Brake (1997) was the first author who put forth a clearly defined organizing framework, which he called the *global leadership triad*, for the set of competencies derived from his previous research on the global business literature as well as qualitative data with leading practitioners. In his book, *The Global Leader: Critical Factors for Creating the World Class Organization*, he developed a model which divided the competencies into three groupings: (a) business acumen, (b) relationship acumen, and (c) personal effectiveness. He argued that there was an urgent need for companies to develop global leaders at all levels of the organization. The component at the center of the triad he called the *transformational self*, which is his term for the resulting changes in self-development and openness this “philosophy of possibility” (p. 44) produced. See Figure 1 for a visual representation of his model.
His research provided insights into the necessary organizational capabilities for building and sustaining global competitiveness, culture-building tools for generating leadership potential at all levels of the organization, and a three-step leadership process to aid in the transformation of personnel in the organization which involved reframing challenges as opportunities, generating personal and organizational energy, and transforming that energy into world-class performance (Brake, 1997).

**Global literacies.** The research of Rosen et al. (2000) resulted in the book *Global Literacies: Lessons on Business Leadership and National Cultures*. Their mixed methods study consisted of 75 interviews of CEOs from 28 countries, as well as surveys of over 1,000 self-identified global leaders from 18 countries. There were three goals:
(a) to define the characteristics most common to successful global leaders and their companies; (b) to identify the leadership factors most likely to predict global success in the twenty-first century; and (c) to identify the unique national contributions to leadership around the world. (Rosen et al., 2000, p. 377)

Their analysis resulted in four universal leadership qualities the authors called global literacies.

- Personal literacy includes competencies such as understanding and valuing oneself, self-awareness, openness, honesty, and commitment to learning;
- Social literacy focuses on the interpersonal aspect of leadership, forming collaborative relationships, networking, and challenging those with whom they work;
- Business literacy entails the technical savvy and expertise of the particular job assignment, as well as impact on organizational effectiveness; and
- Cultural literacy involves the understanding of cultural differences and the ability to leverage these differences in the service to the organization and workforce.

Rosen et al.’s (2000) work highlights the complexity of leadership in a global context and views leadership roles holistically, rather than as a result of success in separate competencies. Stressing the assumption of a global marketplace and customer base regardless of industry or size of the organization, Rosen et al. (2000) posit that the development of a global mindset as one of the current challenges and opportunities of all organizations.
Global leadership dimensions. In 2002, Mendenhall and Osland presented their extant review of the empirical and non-empirical literature at the Academy of International Business Symposium in Puerto Rico (Osland, 2008a). An extensive list of 56 global leadership competencies was categorized into six domains: (a) cross-cultural relationship skills, (b) traits and values, (c) cognitive orientation, (d) global business expertise, (e) global organizing expertise, and (f) visioning. See Table 2 for an overview of the 56 associated competencies and their placement within the six domains.

Bird (2013) praised this early attempt at creating an organizing structure for an increasingly unwieldy number of competencies, but he also offered criticism; notably, that the six categories were not of the same qualitative type (i.e., skills and values) and often conceptually overlap (i.e., certain aspects of cognitive orientation may overlap with expertise). Yet, the work of attempting to bring order to the growing list of competencies had begun in the literature of global leadership.

Pyramid model of global leadership. Bird and Osland’s (2004) pyramid model of global leadership represents the idea that global leaders require a base of threshold knowledge and traits that serve as a foundation for higher-level competencies. The five-level model suggests a cumulative progression through the competencies. See Figure 2 for a visual representation of the pyramid model.

The global knowledge of Level 1 represents the most basic element. Bird and Osland (2004) refer to this level as more of a resource than a competency, and serves as a foundation for everything above it in the framework. Level 2, threshold traits, consists of integrity, humility, inquisitiveness, and hardiness. Level 3 of the pyramid shifts to attitudes and orientations that influence how leaders perceive and interpret the world.
This level consists of (a) cognitive complexity, indicating an ability to see the world through multiple perspectives; (b) cosmopolitanism, an awareness of the world and positive orientation towards it; and (c) global mindset, the result of these attitudes and orientations which enables leaders to think outside the narrow confines of a single cultural lens.

Table 2

Global Leadership Dimensions with Associated Competencies

<table>
<thead>
<tr>
<th>Relationship Skills</th>
<th>Organizing Expertise</th>
<th>Traits</th>
<th>Cognitive</th>
<th>Business Expertise</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close personal relationships</td>
<td>Team building</td>
<td>Curiosity / inquisitiveness</td>
<td>Environmental sensemaking</td>
<td>Global business savvy</td>
<td>Articulating a tangible vision and strategy</td>
</tr>
<tr>
<td>Cross Cultural Communication skills</td>
<td>Community building</td>
<td>Continual learner</td>
<td>Global mindset</td>
<td>Global organizational savvy</td>
<td>Envisioning</td>
</tr>
<tr>
<td>Emotionally connected ability</td>
<td>Organizational networking</td>
<td>Learning orientation</td>
<td>Thinking agility</td>
<td>Business acumen</td>
<td>Entrepreneurial spirit</td>
</tr>
<tr>
<td>Inspire, motivate others</td>
<td>Creating learning systems</td>
<td>Accountability</td>
<td>Improvisation</td>
<td>Total organizational astuteness</td>
<td>Catalyst for cultural change</td>
</tr>
<tr>
<td>Conflict management</td>
<td>Strong operational codes</td>
<td>Integrity / courage</td>
<td>Cognitive complexity</td>
<td>Stakeholder orientation</td>
<td>Catalyst for strategic change</td>
</tr>
<tr>
<td>Negotiation expertise</td>
<td>Global networking</td>
<td>Commitment</td>
<td>Cosmopolitanism</td>
<td>Results orientation</td>
<td>Empowering, inspiring</td>
</tr>
<tr>
<td>Empowering others</td>
<td>Strong customer orientation</td>
<td>Hardiness</td>
<td>Managing uncertainty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managing cross-cultural ethical issues</td>
<td>Results-orientation</td>
<td>Maturity</td>
<td>Local vs. global paradoxes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Adapted from Mendenhall & Osland, 2002.
Level 4 is associated with *interpersonal skills* and highlights the ability to communicate across cultures. This level consists of (a) mindful communication, (b) creation and building of trust, and (c) the ability to work in multicultural teams. The peak of the pyramid represents the fifth level of this framework, *system skills*, and incorporates the set of skills that involve managing the systems of the global organization. The competencies here include (a) the ability to span boundaries; (b) the ability to build a community through multi-cultural and interpersonal skills; (c) the ability to lead change on a global level; (d) architecting, which refers to the ability to function in complex, transnational organizational design and alignment; (e) the ability to influence multiple stakeholders, whether on an individual level or an institutional level; and (f)
ethical decision making, conforming to high ethical standards and seeing the long-term implications of the actions taken by individuals and organizations (Bird & Osland, 2004; Osland, 2012). This framework attempts to identify the building blocks of global leadership and represents a simplification of the complex array of competencies found in the literature.

Integrated framework of global leadership competencies. The next major attempt at synthesizing global leadership competencies was conducted by Jokinen (2005), whose review of the expatriate and global leader literature suggested an integrated framework of global leadership consisting of three broad layers: (a) a fundamental core, (b) mental characteristics, and (c) behavioral skills. The fundamental core lays the foundation for development of higher level skills and provides indicators for future global leadership success. They consist of competencies related to (a) self-awareness, (b) engagement in personal transformation, and (c) inquisitiveness. Jokinen’s (2005) second layer consists of the cognitive competencies that affect decision making in a complex environment: (a) optimism, (b) self-regulation, (c) motivation to work in an international environment, (d) social judgment skills, (e) empathy, (f) cognitive skills, and (g) the acceptance of contradictory nature of complexity. Finally, the third layer represents the behavioral skills that are related to the hands-on talents and knowledge bases that lead to success in the global context: (a) social skills, (b) networking skills, and (c) knowledge. Jokinen (2005) stated that these layers are built upon the idea of global leadership knowledge, skills, and behaviors as a continuum, rather than just a list of competencies. Her layers indicate movement from one layer to the next. Again, Bird’s (2013) critique found similar issues with this
framework, noting that there was conspicuous categorical obscurity—optimism, while placed in the mental characteristics layer represents the kind of personality characteristic that should have been listed as a fundamental core. Bird (2013) also noted that this framework placed much more emphasis on interpersonal competencies at the expense of business and organizational competencies. See Table 3 for an overview of Jokinen’s (2005) integrated framework of global leadership competencies.

Table 3


<table>
<thead>
<tr>
<th>Layers of Competencies</th>
<th>Competency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Behavioral Skills</td>
<td>Social skills</td>
</tr>
<tr>
<td></td>
<td>Networking skills</td>
</tr>
<tr>
<td></td>
<td>Knowledge</td>
</tr>
<tr>
<td>Mental Characteristics</td>
<td>Optimism</td>
</tr>
<tr>
<td></td>
<td>Self-regulation</td>
</tr>
<tr>
<td></td>
<td>Motivation to work in an international environment</td>
</tr>
<tr>
<td></td>
<td>Social judgment skills</td>
</tr>
<tr>
<td></td>
<td>Empathy</td>
</tr>
<tr>
<td></td>
<td>Cognitive skills</td>
</tr>
<tr>
<td></td>
<td>Acceptance of complexity and its contradictions</td>
</tr>
<tr>
<td>Fundamental Core</td>
<td>Self-awareness</td>
</tr>
<tr>
<td></td>
<td>Engagement in personal transformation</td>
</tr>
<tr>
<td></td>
<td>Inquisitiveness</td>
</tr>
</tbody>
</table>

*The global leader of tomorrow.* Peters and Gitsham (2010) published a study called *The Global Leader of Tomorrow,* which was conducted by the Ashridge Business
School in conjunction with the European Academy of Business in Society and other leading business schools around the world. It was based on both extensive interviews and surveys of global CEOs and senior executives. The findings reported that less than 8% of respondents believed global knowledge and skills were being developed effectively either in their own organization or in business schools. The findings grouped the requisite knowledge and skills into three clusters. The first area of competence highlighted was an understanding of the changing business context, including the risks and opportunities of environmental and social trends. The second cluster of knowledge and skills were related to leading in the face of global complexity and ambiguity. This included such competencies as being able to understand the interdependency of the actions performed by individuals and organizations, as well as an understanding of the ethical basis upon which decisions are made. The third cluster involved competencies related to connectedness, or the ability to understand the stakeholders in the wider political, cultural, and economic landscape and the talent to span the boundaries between such disparate entities. Peters and Gitsham (2010) posited that the development of these clusters of knowledge and skill should focus on high-impact learning experiences, coaching, and appreciative inquiry.

**Content domain of intercultural competence in global leadership.** Bird et al. (2010) conducted an extensive review and synthesis of global leadership and expatriation literature to develop a comprehensive domain definition for intercultural competence in the context of global leadership. According to Bird et al. (2010), all previous reviews of global leadership literature agree that a major dimension of global leadership involves the mastery of intercultural competence. However, none of the reviews to date are able to
definitely delineate which intercultural competencies form the nomological net in terms of their valence and cogence to manifestations of effective global leadership. (p. 813)

Bird et al. (2010) devised three factors to help identify the content domain of intercultural competence within the global leadership construct: (a) perception management, (b) relationship management, and (c) self-management. *Perception management* includes the cognitive approaches leaders take toward cultural differences, including withholding judgment, inquisitiveness, tolerance of ambiguity, cosmopolitanism, and inclusiveness. *Relationship management* includes the attitudinal orientations towards key stakeholders, such as relationship interest, interpersonal engagement, emotional sensitivity, self-awareness, and social flexibility. *Self-management* describes the internal identity and effective strategies for managing stress and emotions in the complex global context. This includes optimism, self-confidence, self-identity, emotional resilience, non-stress tendency, and stress management (Bird et al., 2010). The authors posit that the value of continuing the tradition of providing an organizing framework for an ever-increasing and unwieldy list of competencies is not in the establishment of a final categorization, but rather “as a foundation upon which scholars can build a more sophisticated, nuanced understanding of intercultural competencies associated with global leadership and their interrelationships” (Bird et al., 2010, p. 821).

**Framework of nested global leadership competencies.** In the second edition of *Global Leadership: Research, Practice, and Development* (Mendenhall et al., 2013), Bird (2013) published a book chapter in which he systematically evaluated the literature from the early 1990s and categorized over 160 competencies from over 20 previous
studies and literature reviews, placing each competency into one of three broad
categories. Bird (2013) further consolidated the semantic differences and arrived at 15
competencies—five within each of the categories: (a) competencies of business and
organizational acumen, (b) competencies of managing people and relationships, and (c)
competencies of managing self. See previous Table 1 for the visual representation of
the framework of Bird’s (2013) competencies.

**Business and organizational acumen.** The five competencies associated with
this grouping include (a) vision and strategic thinking, (b) leading change, (c) business
savvy, (d) organizational savvy, and (e) managing communities. **Vision and strategic
thinking** includes the ability to understand and act in complex and strategic settings,
intellectual intelligence, short- and long-term thinking, and seeing the interdependent
aspects of strategic thinking. It also includes the development of a global vision for an
organization and the development and implementation of strategic plans. **Business
savvy** encompasses two types of knowledge—general business savvy and technically-
oriented knowledge—as well as the attitude of incorporating entrepreneurialism and
creativity into the organization. **Managing communities** centers on global leaders’ ability
to succeed within the vast network of relationships developed through interactions of a
global workforce, and includes the skills of spanning boundaries, influencing
stakeholders, and accomplishing strategic objectives. **Organizational savvy** includes
the ability to design organizational structures and processes, as well as function
effectively within the organization. Finally, **leading change** indicates a results-oriented
competency derived from the application of all previous competencies.
Managing people and relationships. The five competencies associated with this grouping include (a) valuing people, (b) cross-cultural communication, (c) interpersonal skills, (d) teaming skills, and (e) empowering others. Valuing people is a foundational competency describing the respect shown for people and their differences, a deep-level understanding of the emotions and motivations of others, and the creation and maintaining of trusting relationships. Interpersonal skills consists of both emotional intelligence (sensitivity, engagement, and self-awareness) and relationship management (influencing, listening, goal setting). Cross-cultural communication is a broad competency which includes the mindfulness of a general cultural awareness and specific cognitive and behavioral skills in an intercultural context—including foreign language skills, negotiating, and communication skills. Empowering others addresses talents such as increasing self-efficacy within the relationship of direct reports, colleagues, and superiors, as well as the skills related to coaching, instructing, personal and professional development, and delegation of authority. Finally, teaming skills refer to effectively working in multicultural and global teams, as well as being able to both lead and take subordinate roles in global teams.

Managing self. The five competencies associated with this grouping include (a) resilience, (b) character, (c) inquisitiveness, (d) global mindset, and (e) flexibility. Resilience is characterized by the predispositional dimensions of optimism, hardiness, and stress-reduction; the attitudinal dimensions of resourcefulness and self-confidence; and the behavioral skills that include healthy lifestyle choices (exercise, medication, proper rest, nutrition) and work-life balance. The competency of character contains the greatest number of possible dimensions in the literature, but includes such traits as
honesty, maturity, and diligence. Inquisitiveness refers to a willingness to be open to new ideas, experiences, and people. Additionally, humility can be added here, as it refers to the trait of not letting pride or self-consciousness interfere with the learning process; in short, allowing oneself to be taught by others. A global mindset is a cognitive competency that reflects the complex melding of new perspectives, attitudes, and knowledge within a global context. It includes cognitive complexity and cosmopolitanism, including interest in and knowledge of the greater world. And finally, the competency of flexibility refers to both intellectual flexibility (a tolerance for ambiguity) and behavioral flexibility (a willingness to adapt behaviors to fit the demand of the situation).

While Bird (2013) sought to facilitate the development of a framework for global leadership that brings together results from many scholars whose research was often taking place simultaneously, he acknowledged, “It is questionable whether any field of inquiry can move forward if it persists in accommodating an ever-increasing array of constructs, many of which have largely overlapping construct domains” (p. 96). Bird’s (2013) aim was to bring the proliferation of competency dimensions to a standstill, paradoxically acknowledging that

the nature of rigorous inquiry holds that there is always the possibility that new theory and new empirical findings may lead to a reformulation of existing organizing frames, an extension or elaboration of current constructs, or even the development of new ones. (p. 96)

There were several challenges associated with Bird’s (2013) content analysis. The list of competencies consisted of an assortment of “qualitatively different types” (p. 83). For example,
There are *predispositional characteristics of personality* (italics in original) (e.g. inquisitiveness, optimism, conscientiousness, extraversion); *attitudinal orientations* (e.g. cosmopolitanism; appreciating cultural diversity; results orientation); *cognitive capabilities* (e.g. cognitive complexity, intellectual intelligence, embrace duality); *motivational inclinations* (e.g. motivation to learn; tenacity); *knowledge bases* (value-added technical and business skills, global knowledge, business acumen); and *behavioral skills* (building partnerships and alliances, cross-cultural communication, boundary spanning). (p. 83)

The construct of global leadership competency identification and framework development has been as extensive and multidimensional, mirroring the complexity of the entire field of global leadership. The continuing challenge for researchers and practitioners is learning how to institute development models so that as many of these competencies as possible can be incorporated into training programs.

**Summary of Global Leadership Literature**

This review summarized the progress the field of global leadership has made toward a construct definition, delineation between descriptions of global leadership and other subsets of leadership, and the identification of global leadership competencies. Numerous empirical studies, published literature reviews, and concept papers which have attempted to organize global leadership competencies into a developmental framework were highlighted. As with most nascent fields of study, much work remains and the quality of existing literature must be critically analyzed for quality (Osland, 2013). The results are not definitive, and there is no consensus as yet; neither on a construct definition, nor on a definitive list of competencies required by today’s leaders operating in a global context. Altogether, over 160 competencies have been described by the literature reviewed for this study, "a list too large to be useful" (Osland, 2012). Overlapping concepts, semantic differences, and categories which are qualitatively
different fill the literature (Bird, 2013; Jokinen, 2005). As Conger and Ready (2004) stated:

Competency research, while very useful, is never the complete answer. It fails to explicate the process that global leaders utilize or to identify the contingencies that influence their behavior in specific contexts. Nor does it distinguish between essential and nonessential competencies. (p. 46)

Osland’s (2012) review of global leadership literature stated, “Scholars have focused more on what global leaders are like than on what they actually do” (p. 77). Though global leadership research is advancing with a body of literature all its own, it is still reminiscent of the kind of literature which explores traits and lists found in the early stages of the field of domestic leadership (Osland, 2012). Gaps exist in global leadership process, development, and theory (Mendenhall et al., 2008; 2013).

Mendenhall and Osland (2002) stated that more exploratory empirical research is needed. This study sought to add to this body of knowledge by expanding the application of these ideas and competencies into the field of adult education.

**Adult Education Graduate Programs and Global Leadership**

Adult education as a field of graduate study is characterized with a “distinctive body of knowledge that embraces theory, research, and practice relating to adult learners, adult educators, adult education and learning process programs, and organizations” (CPAE, 2008, p. 3). Throughout the second half of the twentieth century, the occupational and academic backgrounds of students enrolled in adult education have changed (McCarron, 2006). In 2012, the American Management Association (AMA) stated that in addition to academic careers in continuing education, postsecondary environments, cooperative extension, and adult basic education, among others; graduate students in adult education are also entering the global workforce in
the areas of program development, workplace learning, nonprofit organizations, corporate training, and Human Resource Development (HRD). The increase of professionals from corporate and not-for-profit training backgrounds, as well as the addition of HRD components into adult education graduate programs mirrors the growth of these industries and initiatives in the global workforce at large (AMA, 2012).

In 2008, the Commission of Professors of Adult Education (CPAE) published the Standards for Graduate Programs in Adult Education which suggested “guidelines and standards for high quality planning, administration, and evaluation of adult education disciplinary graduate education” (p. 3). These Standards describe four distinct sections: (a) administration, (b) organization of graduate study, (c) curriculum, and (d) faculty members. CPAE (2008) acknowledges that “Adult Education programs of study encompass a wide range of specialty areas and institutional contexts” (p. 4). Additionally, because of the interdisciplinary uniqueness of adult education, the adult education graduate program in any given institution might be housed in any number of colleges (e.g., education, agriculture, human development) (CPAE, 2008).

Based on the 2008 CPAE standards, adult education doctorate-level programs should encompass the following nine core topical elements:

- Advanced study of adult learning (theory and research)
- Historical, philosophical foundations of adult education
- Study of leadership, including theories or organizational leadership, administration and change
- Analysis/study of the changing role of technology in adult education
- Study of issues of policy in relation to adult education
- Analysis of globalization and international issues or perspectives in adult education
- In-depth analysis of social, political and economic forces that have shaped the foundations and discourse within adult education
• Advanced specialty courses relevant to unique program and faculty strengths (e.g., continuing professional education, workplace learning, social movement learning)
• Appropriate depth of qualitative or quantitative research methodology coursework to support dissertation research and ability to utilize existing literature. (CPAE, 2008, p. 9)

In a content analysis of 37 adult education graduate programs offering Ph.D., Ed.D., or both degrees, Sonstrom (2011) reported on the percentage and frequency of each of the nine CPAE standards found. See Table 4 for the findings of her content analysis of the 2008 CPAE standards in the adult education graduate programs surveyed.

Table 4

Results of Content Analysis of Nine CPAE Standards in 39 Adult Education Graduate Programs Offering Ph.D., Ed.D., or Both Degrees.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Frequency</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>94.60</td>
<td>35</td>
<td>Appropriate depth of qualitative or quantitative research methodology coursework to support dissertation research and ability to utilize existing literature</td>
</tr>
<tr>
<td>91.90</td>
<td>34</td>
<td>Advanced study of adult learning (theory and research)</td>
</tr>
<tr>
<td>86.49</td>
<td>32</td>
<td>Study of leadership, including theories or organizational leadership, administration and change</td>
</tr>
<tr>
<td>81.08</td>
<td>30</td>
<td>Advanced specialty courses relevant to unique program and faculty strengths (e.g. continuing professional education, workplace learning, social movement learning)</td>
</tr>
<tr>
<td>78.38</td>
<td>29</td>
<td>Historical, philosophical foundations of adult education</td>
</tr>
<tr>
<td>62.16</td>
<td>23</td>
<td>Study of issues of policy in relation to adult education</td>
</tr>
<tr>
<td>51.35</td>
<td>19</td>
<td>Analysis of globalization and international issues or perspectives in adult education</td>
</tr>
<tr>
<td>45.95</td>
<td>17</td>
<td>Analysis/study of the changing role of technology in adult education</td>
</tr>
</tbody>
</table>

Note: Adapted from Sonstrom (2011).
Today, much of the focus on adult education graduate programs is on continuing education, corporate training, and HRD—all areas that are important in the field of global leadership competency development. The purpose of this study was to explore the development of global leadership competencies in adult education graduate programs.

Conceptual Framework for Development of Interview Protocol

Appreciative inquiry (AI). The interview protocol for the qualitative interviews was developed with the framework of appreciative inquiry (AI) in mind. AI seeks to ask questions leading to the discovery of what works best in an organization. Cooperrider and Whitney (2005) define AI as

The cooperative search for the best in people, their organizations, and the world around them. It involves systematic discovery of what gives a system life when it is most effective and capable in economic, ecological, and human terms. AI involves the art and practice of asking questions that strengthen a system’s capacity to heighten positive potential. (p. 8)

Its framework and methods have become widely implemented in academia, business, governmental, and non-governmental organizations, as well as personal executive coaching and leadership development programs all over the world (Cockell & McArthur-Blair, 2012; Cooperrider, Whitney, & Stavros, 2008; Kelm, 2005; Orem, Binkert, & Clancy, 2007; Whitney, Trosten-Bloom, & Rader, 2010). The premise asks organizations to focus on what is working in an organization and to build upon that success (Cooperrider et al., 2008). It is a systematic discovery of what gives life to success in people’s lives (Watkins, Mohr, & Kelly, 2001). This success is rooted in the art and practice of asking questions that reinforce the power to raise the positive potential of the phenomena under inquiry. It is grounded in the theory of social
constructionism (Watkins et al., 2011) and first appeared in the early doctoral work of Cooperrider in the 1980s. According to Whitney and Trosten-Bloom (2003), it has since become one of the fastest growing frameworks of organizational change. Of the hundreds of local and global organizations that have used AI transformational initiatives, one assumption has grounded the framework: Every organization has something within that works right—that when utilized effectively, provides life, growth, and vitality for the organization.

**Affirmative topic choice.** The affirmative topic choice is an integral part of the AI framework, especially when an organization is attempting to discover which topic best establishes the organization’s course for learning and transformation. According to Cooperrider and Whitney (2005), because human systems move in the direction of what they study, the attention given to the affirmative topic choice is paramount. For this study, the phenomena selected as the affirmative topic choice was global leadership competencies in adult education graduate programs.

**Positive core.** In the conceptual framework of AI, the positive core is a description of what gives life to an organization when functioning at its best. Cooperrider and Whitney (2005) wrote

> Human systems grow in the direction of what they persistently ask questions about, and this propensity is strongest and most sustainable when the means and ends of inquiry are positively correlated. The single most important action a group can take to liberate the human spirit and consciously construct a better future is to make the positive core the common and explicit property of all. (p. 9)

Though the interview protocol was developed taking each of the three broad categories of Bird’s (2013) framework of nested global leadership competencies into
account, additional questions such as the following may also help an organization identify its positive core:

- Describe a time in your organization that you consider a highpoint experience, a time when you were most engaged.
- Tell me what it is that you most value about yourself, your work, and your organization.
- At its best, what factors give life to your organization?
- How would your organization look if everything was just as you wished it could be?

The answers and stories that questions such as these generate should be shared throughout the organization and celebrated as a common, positive core on which to begin a change management process (Cooperrider et al., 2008): “The positive core lies at the heart of the AI process” (p. 34).

It is in the realm of sparking enthusiasm and enriching the human element (relationships, imagination, engagement, goal setting, etc.) where leaders instigating the AI paradigm can find greatest success (Cockell & McArthur-Blair, 2012). “People are inspired by inquiring into the best of what is rather than demotivated by looking at what’s wrong” (p. 15). Holding discussions about what is truly desired, longed for, idealized—and then discovering the gap between where the organization is now and where they want to be—are the roots for success (Cooperrider & Whitney, 2005).

**Summary**

This chapter began with a review of the attempts to define global leadership. As a nascent field of study within the broader leadership field, global leadership literature
has undergone a growing stage common for developing constructs. This review highlighted scholars who attempted to differentiate global leadership from domestic leadership. It also focused on describing the expanding list of global leadership competencies found throughout the literature of the past 20 years. In addition to the construct of global leadership, this literature review detailed the 2008 standards for adult education graduate programs as published by the Commission of Professors of Adult Education (CPAE). Highlighting the connection between these standards and the connection to globalization and leadership development, the CPAE standards illustrate a gap in the literature between adult education and global leadership competency development. Finally, this literature review also described an overview of appreciative inquiry which guided the formation of the instrument used in the collection of data for this study.
Chapter 3

Methods

The purpose of this study was to examine the extent to which global leadership competencies are addressed and developed in selected adult education graduate programs in the United States and Western Europe. This chapter describes the methods utilized in conducting the study and is divided into six parts: (a) research questions, (b) research design, (c) data collection, (d) data analysis, (e) validity and reliability, (f) ethical considerations, and (g) summary.

Research Questions

To accomplish the purpose of this exploration into the phenomenon of global leadership competencies within adult education graduate programs, the following research questions were addressed:

1. Which global leadership competencies are addressed in the selected adult education graduate programs in the United States and Western Europe?
2. Which global leadership competencies are perceived to be the most important by faculty and administration of the selected adult education graduate programs in the United States and Western Europe? Similarly, which global leadership competencies are perceived to be less important by the interviewees?
3. What are the reported practices to develop global leadership competencies in the selected adult education graduate programs in the United States and Western Europe?
4. Based on the researcher’s analysis of the data, what are the similarities and differences in the development of global leadership competencies between the selected adult education graduate programs in the United States and those of Western Europe?

**Research Design**

This section describes the design for the research, including the rationale for choosing a phenomenological study and a multiple case study, as well as the selection of the cases and the development of the instrument. This qualitative study utilized a multiple case strategy (Stake, 2006) and a systematic, carefully structured design process, facilitated by a methodical iterative analysis of the data (Tracy, 2013). The researcher’s goal in a phenomenological study is to identify specific phenomena as they are perceived by the participants being studied (Lester, 1999). Deep information and perceptions are gathered through inductive, qualitative methods such as interviews, conversations, participant observations, action research, focus groups, and analysis of documents. Particularly effective at bringing into focus experiences from the participant’s own perspective, phenomenological methods can challenge structural or normative assumptions (Lester, 1999). The dimension of *interpretation*, therefore, enables this approach to be used as a basis for practical theory, allowing it to inform, support, or challenge policy and action. According to Lester (1999), this design centers on “minimum structure and maximum depth, in practice constrained by time and opportunities, to strike a balance between keeping a focus on the research issues and avoiding undue influence by the researcher” (p. 2).
Case studies explore a “bounded system of a case or multiple cases over time through detailed, in-depth data collection involving multiple sources of information rich in context” (Creswell, 1998, p. 61). A case study facilitates a rich and holistic account of the phenomenon being researched since it originates in real-life situations (Merriam, 1998). Yin (2014) describes the scope of a case study as an “empirical inquiry that investigates a contemporary phenomenon in depth and within its real-world context” (p. 16). Yin (2014) posits that case studies are able to cope with distinctive situations in which the number of variables of interest far outnumber data points, rely on the triangulation of multiple sources of evidence, and benefit from prior development of theory which guides data collection and analysis. Both uniqueness and commonality provide justification for using case studies (Stake, 2006). Three conditions in which case study design is the most effective are (a) the research question is related to the how or why of a phenomenon, (b) the researcher has a lack of control over the actual behavioral events, and (c) the degree of focus is on a contemporary, rather than a historical, phenomenon (Yin, 2014).

The multiple case study design investigates several cases to gain insight into a central phenomenon (Creswell, 2003; Stake, 2006; Yin, 2014). In a multiple case study, the researcher hopes to “(a) define research topics broadly and not narrowly, (b) cover contextual or complex multivariate conditions and not just isolated variables, and (c) rely on multiple and not singular sources of evidence” (Yin, 2014, p. 43). Additionally, the evidence collected from multiple cases is often considered more compelling and robust (Herriott & Firestone, 1983).
For the purposes of this research, a multiple case study allowed for the interviewing of faculty and others in leadership positions at seven adult education graduate programs in the United States and Western Europe. The multiple case study provided more compelling evidence in the exploration of how and why different adult education graduate programs facilitate global leadership competency development. See Figure 3 for a diagrammatic overview of the design of this study.

Figure 3: Diagrammatic overview of study from method selection to data analysis.
**Case selection.** Developing an understanding of learning practices in adult education graduate programs was enhanced by interviewing a variety of cases in multiple settings. The purposive, targeted cases selected for this study were adult education graduate programs located geographically in the United States and Western Europe. These geographic regions were selected due to the familiarity of the areas by the researcher. Additionally, the regions represented the geographical locations of the greatest number of studies reviewed in the literature.

In order to gain multiple perspectives in the area of global leadership competency development in adult education graduate programs, a purposive selection of participants was utilized. All programs were selected based on their willingness to participate in the study. The aim was to sample adult education graduate programs from universities with clearly identified global dimensions or intentions within their published strategic plans or other published sources. Adult education departments with doctoral programs were prioritized over those with master degree programs only. Seven adult education graduate programs were recruited to participate. One adult education graduate program served as a field test during the validation process for the interview protocol. The remaining six adult education graduate programs included three from the United States and three from Western Europe. This case selection process led to an understanding of how the phenomenon of global leadership competency development is practiced and developed among different graduate programs and in different settings.

At each university targeted to participate, initial contact was made with one faculty member, preferably the adult education program coordinator, in order to receive
a verbal agreement to participate. Initial contacts included adult education professionals at national conferences, as well as visiting faculty to the researcher’s home institution. Additionally, an extensive purposive internet search of prospective case institutions was conducted in order to acquire contact information and details regarding the adult education program requirements and degrees conferred. This initial contact was then followed up with a formal request via email to participate in the research. See Appendix C for a sample of the email invitation to participate in the study. In this correspondence, the initial contact person was asked to identify one other faculty member who would be willing to participate as an interviewee. By utilizing this process, there was a similarity in the philosophical foundations of both faculty members from the selected institution to aid in the validation of the data. See Appendix D for an example of the letter of support offered by the institutions who agreed to participate.

Instrument

The primary instrument created for this study was an interview protocol. The interview protocol was developed by the researcher and utilized the conceptual frameworks of appreciative inquiry (Cooperrider & Whitney, 1999), the structure of Krueger and Casey’s (2009) guide for applied research, and Bird’s (2013) framework of nested global leadership competencies to establish the content domain. The interview questions were generated and refined using an iterative process, the researcher’s prior work and academic experiences, and feedback from the researcher’s major professor and committee. The process of instrument development used a multiple panel approach to create and validate the interview protocol. All stages of development incorporated representatives from the fields of adult education and research and
measurement, as well as professionals with international and global leadership experience. This approach to instrument creation and validation was developed at the University of South Florida (USF) with input and support of experts in research and measurement and adult education (Abney, 1992; James, Witte, & Galbraith, 2006). It has been used successfully in over 20 dissertations at USF.

**Interview protocol development.** The interview protocol was developed using the following seven-step process.

- **Step 1:** Researcher. The researcher created the first draft of the interview protocol based on a review of the literature, the conceptual frameworks of Bird’s (2013) framework of nested global leadership competencies, the language of appreciate inquiry (AI), and subject matter expert input. The interview protocol were designed with opening questions to help establish rapport, transition questions, key questions, and an ending question (Krueger & Casey, 2009).

  - **Step 2:** Initial Development. The initial review of the researcher’s first draft of the interview protocol consisted of domestic and international doctoral students primarily from the Leadership, Counseling, Adult, Career, and Higher Education department, but also included doctoral students from other departments within the College of Education as well. These doctoral students were provided a paper form with the list of the questions from the first draft of the interview protocol, which included a space for providing critique and comment regarding language, clarity, and completeness. This was followed by a developmental review by a current faculty member with a Ph.D. residing at an adult education graduate
program at a different institution in the United States. Based on this feedback, the researcher created a second draft of the interview protocol.

- Step 3: Validation Panel. The validation panel provided the next level of review. The six members of this panel were selected based on a geographical and native-language alignment with the region and languages of the selected cases. The validation panel had the responsibility of assessing the appropriateness and accuracy of the questions for their intended purpose, as well as to assess its comprehension, wording, and appropriateness for both geographic populations. This review was performed via the online survey software Qualtrics. See Appendix E for a list of validation panel members and their areas of expertise. Examples of the validation panel correspondence and instructions are included in Appendix F. Based on this feedback, one major change was made to the interview protocol. A question asking the participants to rank order the competencies within each of the three categories associated with Bird’s (2013) framework of global leadership competencies was added to the key question section. This addition provided rich data for analysis. Based on this feedback, the researcher created a third draft of the interview protocol.

- Step 4: Verification Panel. This final review before the field test consisted of a panel of experts from the field of adult education and leadership in a global context. The responsibilities of this panel included a review, concurrence, or refutation of the suitability, clarity, relevance, and completeness of the questions on the interview protocol. This was conducted with the use of 5-level Likert scales via the online survey software Qualtrics. See Appendix G for a list of the
verification panel members and their areas of expertise. Correspondence and instructions for the verification panel are included in Appendix H. See Appendix I for a review of the 5-level Likert scale results for each interview question. Based on this feedback, the researcher created a fourth draft of the interview protocol.

- Step 5: Field Test. After the initial development and the two rounds of panel review, the interview protocol was field tested with faculty members at a local public university in the southeastern United States. The data collected from the field test were initially analyzed with the same rigor as the data which followed during the full study. No changes were made to the interview protocol following the field test, although the value of better organization of paperwork was emphasized in order to save time and effort during the interview process. As a result, the data from the field test were folded into the full study and resulted in the findings for Case 1.

- Step 6: Final Review. Following the field test, a final review of the interview protocol by domestic and international adult education doctoral students took place. This final review included a rechecking of verbiage, thoroughness, and comprehension of the final interview protocol. See Figure 4 for a visual representation of the interview protocol creation process. The complete interview protocol is provided in Appendix J. A list of which research questions were addressed by which interview questions is provided in Appendix K.

**Data Collection**

Properly designed field procedures are essential for data collection in a multiple case research study (Yin, 2014). The data collected were from people and institutions
in *their* everyday situations; therefore, real-world events must be integrated with the needs of the data collection plan. The researcher did not have full control over the data collection environment, as may be the case in other research designs. Interviewers must cater to the interviewee schedule and availability. The nature of the conversations is more open-ended, and the interviewee may not necessarily cooperate in maintaining a strict line of questioning. As a result, “explicit and well-planned field procedures” (Yin, 2014, p. 89) are the best preparation when proceeding with data collection for this type of study.

**Interviews.** The semi-structured, face-to-face interviews were designed to elicit current views and perceptions of global leadership competency development in the selected adult education graduate programs. The interviews were conducted over a three-month timeframe in 2015. Each interview lasted from 60 – 90 minutes. Twelve of the 14 interviews were conducted in the academic setting of the selected adult education graduate programs. Two of the interviews were conducted via Skype. Five of the interviews were conducted with participants for whom English was not the native language. However, all five of these participants were fluent in English. Special care was taken to ensure that the interview protocol was understood by all participants in the study.

Confirmation emails, informed consent procedures, and copies of the interview questions were distributed to participants in preparation of the meetings. Prior to the interviews, the researcher conducted an examination of available syllabi, mission statements, program descriptions, and other supporting documents which led to
additional probing questions and deepened the researcher’s familiarity with the selected adult education programs.

<table>
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<tr>
<th>STAGE 1: Initial Development</th>
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<tbody>
<tr>
<td>• Researcher developed draft interview protocol.</td>
</tr>
<tr>
<td>• First review of draft interview protocol. Selected adult education graduate students and faculty reviewed and provided initial feedback, generated questions for missing information, and/or eliminated unclear items.</td>
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<tr>
<td>• Researcher revised draft protocol based on initial development feedback.</td>
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<th>STAGE 2: Validation Panel</th>
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<tr>
<td>• Selected subject matter experts in adult education, global leadership, and/or research and measurement, aligned with language and geographic areas of the cases, assessed each question and sub-question of revised interview protocol for accuracy of intended purposes, comprehension, wording, and appropriateness.</td>
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<tr>
<td>• Researcher revised interview protocol based on Validation Panel’s feedback.</td>
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<th>STAGE 3: Verification Panel</th>
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<tbody>
<tr>
<td>• Selected subject matter experts in adult education, global leadership, and/or research and measurement, aligned with language and geographic areas of the cases, completed 5-point Likert scale assessments of each question and sub-question of revised interview protocol for suitability, clarity, relevance, and completeness.</td>
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<tr>
<td>• Researcher revised interview protocol based on Verification Panel’s feedback.</td>
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<th>STAGE 4: Field Test</th>
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<tr>
<td>• Researcher field tested final draft version of interview protocol on a sample adult education program.</td>
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<tr>
<td>• There were no changes to the interview protocol based on field test experience and analysis. Only changes in preparation for interviews.</td>
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<th>STAGE 5: Final Review</th>
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<tr>
<td>• Selected adult education doctoral students conducted final review of interview protocol, checking for verbiage, thoroughness, and comprehension.</td>
</tr>
<tr>
<td>• Researcher performed data collection/conducted interviews with final interview protocol.</td>
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Figure 4. Schematic representation of the development of the global leadership competency development interview protocol for selected adult education graduate programs.
Interviews were audio-recorded on the researcher’s computer. An operator error led to a lost audio file of one of the transcriptions. As a result, the data collected for Case 7 consisted of only one interview transcription, although field notes, notes taken during the interview, and the researcher’s reflective journal, as well as the supporting documentation reviewed in preparation for the interviews provided quality data to report.

The audio interviews were subsequently transcribed by a transcriptionist, and the resulting documents were reviewed by the researcher for accuracy. The process of transcribing allows the researcher to become even more acquainted with the data (Reissman, 1993). The researcher created Microsoft Word files for the transcribed interviews, field notes, and journal entries. All files were protected by setting a password. All files were saved in the researcher’s portable computer for which he alone has access.

There were significant errors in the transcriptions received from the transcriptionist, and the researcher took the time to edit each and every word of the transcription to the best of his ability. The edited transcriptions were then sent to the participants for review.

**Field notes.** Research field notes are written or transcribed dictation notes from the researcher used as the basis for later research reports which “consciously and coherently narrate and interpret observations and actions in the field” (Tracy, 2013, p. 128). Field notes are heavy with rich, detailed descriptions which allowed the researcher to re-enter the context of the research field and revisit the time, place, and relationships of the events of the research. The qualities that characterize field notes include clarity, vivid imagery, economy, and piecing together the data as evidence.
Researcher’s reflective journal. Reflective journaling was used by the researcher throughout the data collection and analysis of the study. The journal focused on theoretical, methodological, and personal issues that arose throughout the research process. The researcher’s reflective journal is a form of research-focused reflective writing undertaken by the researcher during a project and through which they document their personal experiences of the research process (Tracy, 2013). Global considerations and skills of reflective processes include articulating and rationalizing concerns, exploring solutions, acknowledging, expressing and examining feelings, establishing goals, formulating plans, deciding on actions, describing and evaluating progress, clarifying concepts and their implications for the research, capturing, exploring, and pursuing ideas, and structuring thoughts (Borg, 2001). Janesick (1998) further described the benefits of incorporating a reflective journal in the data collection process as enhancements of both the understanding of the role of the researcher through reflection and writing, and as refinement of the understanding of the responses of participants in the study. Furthermore, Janesick (1998) posited using a journal as an interactive tool of communication between the research and participants in the study as a type of interdisciplinary triangulation of data, and as a source of data by which individuals become connoisseurs of their own thinking and reflection patterns and indeed their own understanding of their work as qualitative researchers. “The notion of a comprehensive reflective journal to address the researcher’s self is critical in
Qualitative work due to the fact that the researcher is the research instrument” (Janesick, 1998, p. 3). See Appendix L for examples of excerpts from the researcher’s reflective journal.

Supporting documents. According to Yin (2014), “documentary information is likely to be relevant to every case study topic” (p. 105). These documents can take many forms and “should be the object of explicit data collection plans” (p. 105). For the purpose of this research study, the strategic plans of each participating university, as well as available departmental guidelines or descriptions of intent for each degree or program was analyzed with regards to the research questions. Additionally, a primary source of data included syllabi from courses taught at each participating adult education graduate program. These types of documents are all increasingly available through internet searches, and they were requested from each adult education department or program chair who was contacted for participation in the program. Yin (2014) states, “The most important use of documents is to corroborate and augment evidence from other sources” (p. 107). Because of their overall value, the documents collected for this research study played an explicit role in the data collection and analysis.

Data Analysis

According to Stake (2006), examining situational complexity is a vital part of social and behavioral science research. Providing an effective process for studying and analyzing multiple cases within complex programs, Stake’s (2006) process also can be used to investigate broadly occurring phenomena without programmatic links—both its commonality and its differences. The phenomenon at the center of this study was the development of global leadership competencies in selected adult education graduate
programs. While each case was studied to gain insight and understanding of that particular entity, Stake (2006) argued that the complex understanding of the phenomenon as a whole "are understood differently and better because of the particular activity and contexts of each case" (p. 40).

**Thematic analysis.** The consistent and systematic use of analytic tools and techniques assisted the researcher’s analysis of the interviews, field notes, reflective journal entries, and supporting documents (Creswell, 2003; Tracy, 2013). For the thematic analysis of this study, the use of microanalysis within the cases and across the cases, constant comparisons, and theoretical coding, including a priori coding, was used (Strauss & Corbin, 1998; Tracy, 2013).

**Microanalysis.** The data were mined for meaning in a detailed line-by-line analysis of the information (Braun & Clarke, 2006; Stake, 2006; Strauss & Corbin, 1998; Tracy, 2013). According to Strauss and Corbin (1998), this phase of the process was necessary in the early stages of the study in order to discover the initial categories, as well as their further development throughout deeper analysis. According to Merriam (1998), this is where the units of data are first identified that will later be used as a basis for defining categories and subcategories. In this study, microanalysis was applied in the initial examination of the interview transcripts, field notes, reflective journal entries, and supporting documents. A line-by-line review was conducted, searching for data or information that were important to answer the research questions or which led to discovery of any emergent themes. Any possible data point was recorded in a large file designed for this research project. See Appendix M for a worksheet documenting the broad themes based on the research questions.
Within-case analysis. After the interviews for all cases were transcribed and meticulously read through, and all of the supporting documentation was combed for data as well, a within-case analysis was conducted for each case. The approach used for the initial level of qualitative data analysis is best described as iterative. According to Tracy (2013),

An iterative analysis alternates between emic, or emergent, readings of the data and an etic use of existing models, explanations, and theories. Rather than grounding the meaning solely in the emergent data, an iterative approach also encourages reflection upon the active interests, current literature, granted priorities, and various theories the researcher brings to the data. Iteration is not a repetitive mechanical task, but rather a reflexive process in which the researcher visits and revisits the data, connects them to emerging insights, and progressively refines his/her focus and understandings. (p. 184)

The existing model used in the iterative analysis and the source of the a priori categorization was Bird’s (2013) framework of nested global leadership competencies. Utilizing this process allowed for the themes of the study to be annotated based on the research questions (Stake, 2006), yet also allowed for modification as the data emerged. The emergent themes within each a priori category were a direct reflection of the interview questions and the research questions, and the labeling of the themes were modified and relabeled as the research progressed through the process of constant comparison.

Once the themes of the entire study were annotated, the next main emphasis of the analysis focused on reading through and reporting the data from the individual cases. Chapter 4 presents the presentations from this level of analysis for each of the seven cases.

Cross-case analysis. Cross-case analysis leads to assertions about the phenomenon; often depicted more as a mosaic than a simple pattern. The assertions in
a cross-case report are the researcher’s findings about the phenomenon and are based on an interpretation of the evidence found within and across the individual cases. Once the within-case analysis was completed for each case, the cross-case analysis began. Four levels of analysis occurred between the cases, based on the four research questions. Stake (2006) wrote, “The main activity of cross-case analysis is reading the case reports and applying their findings of situated experience to the research questions of the [phenomena]” (p. 47).

The first level of the cross-case analysis was an iterative approach, searching for themes associated with each of the 15 a priori categories documented in Bird’s (2015) framework of nested global leadership competencies, which served as the content domain for the study. In addition to the analysis of these 15 categories, four other themes emerged and were reported. In this first level of cross-case analysis, two to five individual themes emerged for each of the 15 categories.

The second level of the cross-case analysis was a ranking analysis to answer the second research question. This question asked the participants which of the competencies were perceived to be most important, as well as less important, across all seven cases for the future success of the adult education graduate students. Qualitative data throughout the narratives supported the findings of the rank order which was reported in support of this research question.

The third level of the cross-case analysis, in response to the third research question, was a thematic constant comparative approach to discover which curricular (within the classroom) and co-curricular (programmatic) practices were found from the
data across all seven cases. Eleven curricular and 11 co-curricular practices emerged from the data.

The final level of cross-case analysis was also a constant comparative thematic approach to answer the fourth research question regarding similarities and differences between the adult education graduate programs located geographically in the United States and those located in Western Europe.

**Constant comparison.** Constant comparison describes the process of comparing segments of data from multiple sources to look for similarities or differences, "to compare the data applicable to each code, and [to] modify code definitions to fit new data (or else [to] break them off and create a new code" (Tracy, 2013, p. 190). Strauss and Corbin (1998) suggested comparisons on two levels—common and situational properties. In this study, the common property was the geographical location of each adult education graduate program. Next, situational properties (data that may seem unique to each case, yet may indicate an important connection within the construct of the research questions) were compared. Through the identification of categories, constant comparison is an iterative means for the development of findings (Tracy, 2013). It expanded possibilities of data analysis as well as the mindset of the researcher. For this study, each interview was transcribed as soon as possible after the interview for potential themes relevant to this research study. Unexpected issues—themes that may have arisen not related directly to the research questions—were noted for further analysis.

**Coding.** Coding describes the abbreviated designation assigned to different aspects of data to be analyzed (Merriam, 1998; Stake, 2006; Tracy, 2013; Yin, 2014). A
A coding system was developed and utilized as evidence of themes and patterns became identified throughout the analysis of the raw data collected for this study. A priori categories, derived from Bird’s (2013) framework of nested global leadership competencies, were utilized to separate the initial transcriptions into manageable segments associated with the 15 identified competencies. These segments were then further analyzed against all of the research questions. Manual and electronic coding was continuously tested against the field notes, reflective journal, and supporting documents in order to verify both successful pattern identification and difficulties throughout the process. The ideas and perceptions of the researcher were documented in the field notes as well on a daily basis throughout the data collection and analysis phases. These field notes formed a basis for justifying the development of themes and categories that emerged. Rich, thick description of notes and all data were documented to strengthen all coding decisions.

All documents were analyzed manually and within Microsoft Word documents. Color coding was used to highlight transcription lines supporting identified emergent themes for data comparison. Together with the field notes, reflective journal entries, and supporting documents, the coding system process provided a clear chain of evidence through the data (Lincoln & Guba, 1985; Merriam, 1998; Stake, 2006; Yin, 2014). The individual codes were collected in a Microsoft Excel file for further analysis. See Appendix N for an example of the codes and associated transcription lines.

**Validation Procedures**

Four tests have been commonly used to establish the quality of any empirical social research: construct validity, internal validity, external validity, and reliability.
(Creswell, 2003; Tracy, 2013; Yin, 2013). Several tactics have been established for dealing with these tests when conducting case study research in general, and this research study in particular. Table 5 describes the case study tactics, as well as the phase of the research when the tactic was used.

Table 5

*Description of Case Study Tactics and Description of the Phase of Research in Which Tactic Occurs for Four Design Tests of Validity and Reliability.*

<table>
<thead>
<tr>
<th>Tests</th>
<th>Case Study Tactic</th>
<th>Phase of Research in Which Tactic Occurs</th>
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<tbody>
<tr>
<td>Construct Validity</td>
<td>Use multiple sources of evidence</td>
<td>Data collection</td>
</tr>
<tr>
<td></td>
<td>Establish chain of evidence</td>
<td>Data collection</td>
</tr>
<tr>
<td></td>
<td>Primary and supplemental peer review of transcripts</td>
<td>Data analysis</td>
</tr>
<tr>
<td>Internal Validity</td>
<td>Triangulation of data sources</td>
<td>Data analysis</td>
</tr>
<tr>
<td></td>
<td>Use of member checks</td>
<td>Data analysis</td>
</tr>
<tr>
<td></td>
<td>Audit Trail</td>
<td>Research design</td>
</tr>
<tr>
<td>External Validity</td>
<td>Rich, thick description</td>
<td>Data analysis</td>
</tr>
<tr>
<td>Reliability</td>
<td>Use case study protocol</td>
<td>Data collection</td>
</tr>
<tr>
<td></td>
<td>Develop case study database</td>
<td>Data collection</td>
</tr>
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*Note:* Adapted from Yin (2014, p. 45).

**Construct validity.** Construct validity refers to the identification of correct operational measures for the phenomenon being studied (Yin, 2014). Construct validity “is especially challenging in case study research” (Yin, 2014, p. 46). It represents the accuracy reflected in the concepts being studied. For the purpose of this research, a two-step method devised by Yin (2014) identified ways to improve this test of validity.
First, the researcher defined the phenomenon of global leadership competencies and related them to the original research questions. Second, detailed operational measures matched those concepts. The detailed literature review defining and describing the phenomenon of global leadership and a rigorous research design rooted to the research questions of this study met these steps. Additionally, three tactics were employed to increase the construct validity of the study. The first was the use of multiple sources of evidence, in a manner which encouraged lines of questioning which were rooted in the research questions. A second tactic was to establish a chain of evidence, described throughout the research design of the study. The third tactic was to have both a primary peer reviewer and supplemental peer reviewers review the transcripts for accuracy of thematic coding. The research design and research analysis stages of this study incorporated all three tactics.

**Internal validity.** Internal validity is primarily a source of concern for explanatory or causal studies, not for descriptive or exploratory studies (Yin, 2014). The concern over internal validity for this case study research extended to the broader problem of making inferences to other cases. Several strategies were applied in order to increase the credibility of the research findings. Four such strategies included the utilization of (a) triangulation of data sources, (b) member checks, (c) an audit trail, and (d) peer reviews.

**Triangulation.** Triangulation is a technique to facilitate validation of research data through cross verification from two or more sources (Bogdan & Bilkin, 2006; Stake 2006). It helps to assure that the findings of the study are as clear and meaningful as possible, free from the researcher’s own biases (Stake, 2006). According to Stake, the
strategy of triangulation “occurs throughout the fieldwork and analysis. It means being redundant and skeptical in seeing, hearing, coding, analyzing, and writing” (p. 77). It is a process of repetitious data gathering and critical review of new findings.

For the purposes of this study, original data were collected primarily from interviews and supporting documents. All interviewed participants were provided a copy of the interview protocol before the interview was conducted. They were able to prepare responses to the interview questions first in writing before the face-to-face interviews were conducted. Two of the participants had detailed notes regarding the interview questions prior to the start of the interview. This allowed for more in-depth discussions on the phenomenon of global leadership competency development in their adult education graduate program. Finally, the interview participants were provided a copy of the transcript of the actual interview to clarify any issues or miscommunication that occurred during the face-to-face interview.

**Member checks.** All interview participants were sent uncoded transcripts by email after each interview for review, clarification, and/or comments to check for accuracy of the questions and responses. A follow-up email was sent to two of the participants who did not respond to the original email. Most participants returned the transcriptions with only minor changes or corrections. However, one participant submitted major reductions, asking that large portions of the data not be used. The researcher honored her request and did not report that data in the findings.

**Audit trail.** An audit trail is a transparent description of the research steps taken from the start of a research project to the development and reporting of findings (Cohen & Crabtree, 2006). This detailed description facilitates the understanding of the data
and themes which emerge from the findings (Stake, 2006). An audit trail allows any reader to trace the route of the research step-by-step, as all decisions and procedures are described in as much detail as possible. An audit trail aids as an explanation of how findings are obtained.

For this study, each line of the transcripts was numbered and coded for easy return to specific data points—defined as a discrete unit of information or quotation related to a theme—and a summary of the salient points were linked to the raw data. Careful documentation was maintained for all data, including source and method of collection, data analysis procedures, field notes, reflective journal entries, and supporting documents.

**Peer reviews.** The peer review process was instrumental in providing a level of consistency to the research. The use of peer reviewers helped to remove unintended bias and added credibility to the findings. Validation of themes was confirmed with the assistance of a primary peer reviewer and six doctoral students who acted as supporting peer reviewers. The primary peer reviewer was a Ph.D. colleague and associate of the researcher who had expertise in qualitative research analysis. The primary peer reviewer received uncoded transcripts of two completed interviews: one from the United States and one from Western Europe. The primary peer reviewer reviewed the transcripts, provided feedback regarding the a priori segmentation of the transcripts, reviewed the thematic analysis conducted by the researcher, and discussed any changes to the coding structure. See Appendix O for a copy of the consent form signed by the primary peer reviewer.
Additionally, seven supplementary peer reviewers were utilized. Seven doctoral students, each with unique global, multi-cultural, and research-based backgrounds, were provided with an individual uncoded transcription, and a list of the major and minor themes already identified by the researcher. Each supplemental peer reviewer conducted an independent check of his or her assigned interview transcript in order to improve validity. Their task was to search the data and confirm the themes and coding by locating specific examples of the themes within the text. See Table 6 for a breakdown of the reviewer assignments for the inter-coder checking of themes. See Appendix O for the names of the seven supplemental peer reviewers.

Table 6

*Overview of Supplemental Peer Reviewer Assignments for Inter-coder Checking of Themes*

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Case #1</th>
<th>Case #2</th>
<th>Case #3</th>
<th>Case #4</th>
<th>Case #5</th>
<th>Case #6</th>
<th>Case #7</th>
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**External validity/transferability.** External validity refers to the extent to which research results can be generalized in other situations. Rich, thick description in the reporting of the data and the selection of representative cases offer a strategy for increased external validity (Creswell, 2003; Merriam, 1998; Tracy, 2013). Thick description aids in identification of how closely the phenomenon matches across cases;
this in turn suggests transferability of the findings. The detailed requirements for selection as a case in this study provided support for this aspect of external validity.

**Reliability.** The objective of this aspect of a strong, well-supported research study relies on the ability to conduct a similar study on a different case, though not necessarily replicating the same findings (Yin, 2014). The goal of reliability is to “minimize the errors and biases in a study” (Yin, 2014, p. 49). As mentioned earlier, the need to document the detailed procedures is paramount to increase reliability (Tracy, 2013; Yin, 2014).

**Ethical Considerations**

The study was conducted following accepted ethical criteria. For example, some of the considerations made included voluntary participation, acceptable language, privacy and anonymity of participants, and objectivity in discussions and analysis of findings. IRB approval was obtained prior to collection of data. See Appendix Q for a copy of the IRB approval letter.

**Summary**

This chapter described the research methods for this qualitative, multiple-case design. Interview protocols and supporting documents were primary means of data collection. Triangulation of data sources included the creation of transcripts from interviews, field notes, researcher’s reflective journal, and supporting documentation. Data analysis methods included the application of microanalysis, constant comparison, coding for themes, and clear audit trails. The study addressed issues of validity and reliability through the use of triangulation, member checks, rich thick description, and audit trails. Ethical considerations were also addressed.
Chapter 4

Presentation of the Cases

The purpose of this study was to explore the extent to which global leadership competencies are addressed and developed in selected adult education graduate programs in the United States and Western Europe. This chapter presents the within-case analysis from the seven cases, including overviews of the seven selected institutions, a brief profile of each of the 14 participants interviewed for the cases, and a narrative presentation of the data collected from the interview sessions.

For clarity of reading and data presentation, references to field notes and transcription lines are captured in [brackets]; for example, [RW TL: 1-2]. Participant quotes are presented with “quotes” or, if lengthy, by indented paragraph with the referenced transcription line. Reflections from the researcher are noted in parentheses; for example, (researcher’s reflective journal). Verbal characteristics from the interview transcripts that detract from the flow of the presentation of the data, such as “right” or “you know” are minimized. Including ellipsis “...” in the quotes indicates an intentional omission of a word, sentence, or whole section from the quote without altering its original meaning. Quotes which include “//” indicate more significant omissions, though the quote is still able to be read with a constant flow in meaning.

Profiles of the Cases

Each case was represented by two faculty members in an adult education graduate program selected for this study. Four cases were located geographically in
the United States and three cases were located in Western Europe, specifically Ireland, Italy, and Germany. The interview narratives from each participant within each case were interwoven in the synopsis of the case as a whole following the structure of the instrument developed for this study, an interview protocol (see Appendix J). The presentation of the cases was assembled from interview transcripts, field notes, supporting documentation, and the researcher’s reflective journal. A discussion of the multi-layered, iterative analysis of the themes which emerged from the a priori coding of the data is addressed in the following chapter. The following research questions guided the study:

1. Which global leadership competencies are addressed in the selected adult education graduate programs in the United States and Western Europe?
2. Which global leadership competencies are perceived to be the most important by faculty and administration of the selected adult education graduate programs in the United States and Western Europe? Similarly, which global leadership competencies are perceived to be less important by the interviewees?
3. What are the reported practices to develop global leadership competencies in the selected adult education graduate programs in the United States and Western Europe?
4. Based on the researcher’s analysis of the data, what are the similarities and differences in the development of global leadership competencies between the selected adult education graduate programs in the United States and those of Western Europe?
A multiple case, phenomenological design was implemented for this study in order to develop a broader understanding of teaching and learning practices in adult education graduate programs with regards to the phenomenon under inquiry, global leadership competencies. Bird’s (2013) framework of nested global leadership competencies served as the model in the creation of the a priori categories utilized during the creation of the interview protocol, and the analysis which followed. The cases were purposefully selected and located geographically in the United States and Western Europe. The aim was to sample adult education faculty from programs with clearly articulated global dimensions within their published institutional strategic plans, or identified intention to increase global learning practices. Pseudonyms were created to maintain confidentiality of the institutions and faculty members. See Table 7 for an overview of the seven cases selected for this study.

Table 7

Pseudonyms and Location of the Seven Institutions Selected for this Study.

<table>
<thead>
<tr>
<th>Case number</th>
<th>Pseudonym</th>
<th>Location</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Metropolitan Global University (MGU)</td>
<td>Southeastern United States</td>
</tr>
<tr>
<td>2</td>
<td>All-embracing State University (MGU)</td>
<td>Southeastern United States</td>
</tr>
<tr>
<td>3</td>
<td>Approaching-goals University (AGU)</td>
<td>Deep South United States</td>
</tr>
<tr>
<td>4</td>
<td>Community-focused State University (CFSU)</td>
<td>Midwestern United States</td>
</tr>
<tr>
<td>5</td>
<td>German Research City University (GRCU)</td>
<td>Northern Germany</td>
</tr>
<tr>
<td>6</td>
<td>Irish Fast-growing University (IFGU)</td>
<td>Central Ireland</td>
</tr>
<tr>
<td>7</td>
<td>Grand Italian University (GIU)</td>
<td>Northern Italy</td>
</tr>
</tbody>
</table>
Case 1: Metropolitan Global University (MGU). The following is a quote that provided insight into the mindset of the faculty of Case 1: “Students who are not exposed to those other cultures have very narrow mindsets, and I don’t like that” [LF TL: 240-241].

Overview of Case 1. MGU is a large, American metropolitan public research university located in the southeastern United States. MGU is part of a larger 3-campus system, with each regional campus separately accredited by the Commission on Colleges of the Southern Association of Colleges and Schools (SACS). According to the university website, the system as a whole serves more than 48,000 students and is ranked in the top 50 in the nation for research expenditures among all universities, public or private. MGU offers a dynamic learning environment inspiring innovation and creativity and is focused on student success with more than 180 undergraduate, graduate, and doctoral degrees.

With more than 1,700 faculty at the main MGU campus and a student to faculty ratio of 24:1, approximately 86% of full-time faculty members hold terminal degrees in their field of expertise. MGU also has more than 1,200 adjunct professors and instructors, 300 post-doctoral scholars, over 2,000 graduate assistants, and 2,800 student assistants. According to the university fact book, the student diversity profile indicates that 55% of the student population at the main campus is White, 21% Hispanic, 12% African American, 7% Asian, and less than 1% American Indian, Native Hawaiian, or other Pacific Islander.

MGU’s 2013-2018 Strategic Plan emphasizes the development of active partnerships with public and private organizations in order to increase economic and
employment opportunities with a global context. These partnerships should recognize the significance of international relations in an interconnected world. Dedication to becoming a global institution is also reflected in the mission statement of the university, which includes a focus on ensuring student success in a global environment. To this end, MGU developed a Quality Enhancement Plan (QEP) designed to prepare students in meaningful and productive ways in a global society. The goal of the QEP is to foster development of students’ willingness and skills to engage constructively with diverse people, places, events, challenges, and opportunities.

The adult education department is housed in MGU’s College of Education. According to the university’s website,

The graduate programs of study in adult education, continuing education and human resource development prepare individuals for educational leadership in professional associations, business and industry, government, and education organizations that are primarily concerned with adult learning, training, performance and development.

The program offers a Master’s degree in Adult Education and a Ph.D. in Curriculum and Instruction with an Emphasis in Adult Education, as well as a Graduate Certificate in Leadership in Developing Human Resources.

*Participants for Case 1.* Two professors at MGU were interviewed for this case study. The first interviewee was Dr. Lynn Fulton [pseudonym]. Lynn earned her Ed.D. in Adult Education and Educational Research & Measurement in 1976 from a major university in the southern part of the United States. Before arriving at MGU, Lynn was an associate professor and Coordinator of Adult Education in the School of Occupational and Adult Education at a major university in the midwestern part of the United States. She also served as a lecturer and research associate at a major
southwestern United States institution. There she supervised the development of 22 multi-media training modules, directed competency-based adult education activities related to materials development, and taught graduate level courses in the Adult and Extension Education department. According to her biography, Lynn also has extensive consultant experience with projects relating to adult learning styles, learning styles assessment, project evaluation, school improvement, staff development, and curriculum development, among others.

The second interviewee was Dr. Buell Ursery [pseudonym]. He is a full professor at MGU, having previously held faculty positions at two other American institutions. In addition to his role as faculty, he had also served a number of administrative roles including Assistant Dean for Continuing Medical Education and Dean of the College of Continuing Education, each at separate universities located in the midwestern United States; as well as Department Chair of leadership development at MGU. According to his biography, Buell has been successful at securing grant-funded programmatic initiatives and research activities in the area of program evaluation, continuing education administration, and adult learning and development. He is considered a leading authority on continuing education in the community colleges and higher education and continuing professional education, and has become actively involved in human resource development and community college leadership. See Table 8 for an overview of the demographic information for the participants of Case 1.

The interviews took place on successive days in the adult education departmental office area. Lynn’s interview was conducted in a small, circular conference room, while the interview with Buell was conducted in his personal office in
the adult education department. Each interview lasted approximately 75 minutes. After reading the opening statement of the interview protocol and obtaining IRB consent from each professor, the interviews began.

Table 8

*Demographics for Case 1 Participants*

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Lynn Fulton</td>
<td>Female</td>
<td>Ed.D.</td>
<td>31</td>
<td>Professor</td>
</tr>
<tr>
<td>Dr. Buell Ursery</td>
<td>Male</td>
<td>Ed.D.</td>
<td>16</td>
<td>Professor</td>
</tr>
</tbody>
</table>

**Synopsis of the opening interview questions.** The opening question asked each professor to recall a positive experience in their respective positions as a faculty member in the adult education department. Lynn spoke fondly of the second time she took a group of students to Sweden for a study abroad trip associated with the adult education program at MGU. She described how much more rewarding this experience was than the first trip she had taken two years earlier. Though the concept of the trip with regards to syllabus and activities were similar to her first study abroad experience, there was a more manageable number of students on the second trip: “In comparison to the first time, they were the right number of people and there weren’t as many issues. With fewer people, it wasn’t as traumatic on me” [LF TL: 3-5]. The experience left Lynn with a stronger desire to continue coordinating study abroad opportunities in the adult education program, shifting her outlook from the feeling of “never again” [LF TL: 6] she
had experienced after the first trip abroad. The students really enjoyed the experience this time around as well: “There didn’t seem to be the negativity from first time” [LF TL: 7-8].

Buell’s response to the same question led to a conversation about the massive improvement the adult education department at MGU has undergone during his tenure there. Convinced it has become one of the best adult education programs in the country, Buell also emphasized the high caliber of students—highly-motivated, brilliant student who would be successful in any other doctoral program on campus. Finally, Buell said the source of his greatest job satisfaction was the value he places on the “solid relationships with faculty throughout the institution and the students in our programs” [BU TL: 13-14].

The next question asked the participants whether or not they felt enthusiastic or excited about the future of the field of education. Lynn’s response was short and emphatic: “No. I can say I’m enthusiastic in general, but not personally—and that’s [because of] the move to online courses” [LF TL: 11-12]. She acknowledged that although there are possibilities for expanding the range of adult education curriculum through online learning, especially for people around the world in areas with limited access to traditional higher education classroom and limited exposure to the face-to-face experience, she admitted a personal bias toward the trend: “I’m not comfortable teaching that way—and never will be. I like to see the people. I like to interact with the people” [LF TL: 14-16]. The only way the trend towards online teaching could become a positive experience is if the quality can be maintained, both in the content and in the
delivery. Lynn insisted that faculty should be hired “who are good at online teaching” [LF TL: 17].

Similarly, Buell’s level of enthusiasm or excitement regarding the broader field of adult education was muted as well. He lamented on the state of adult education programs across the nation, both past and present: “I grew up with the fathers of adult education, and many of them did not leave their institution in good shape when they left” [BU TL: 20-21]. Some programs were once highly respected for their adult education programs, but they no longer have adult education programs at all. Buell believes there was a more positive shift when his alma mater, a highly respected institution in the northeastern part of the United States, picked up an adult education program. The resulting prestige of having “an AACU institution the caliber of [that institution get] a program in adult education moving” [BU TL: 27-28] as a bright spot in the development of adult education graduate programs in the country. Yet, there is still much pessimism as a result of what he claims is a lack of direction from either the local or national level. When referring to the departmental level at many institutions, he said, “Everyone is out for themselves” BU TL: 32]. And as for direction from the national level, he said that a constant change of leadership within the national associations consistently puts a hold on the creation of a clear sense of direction. Buell described a time when he and another prominent member of the adult education community tried to join forces to form a futures committee with the leadership of the American Association for Adult and Continuing Education (AAACE), but because “they turned over, we lost momentum” [BU TL: 36-37].
The next question addressed the participants’ familiarity with the 2008 Commission for the Professors of Adult Education (CPAE) *Standards for Graduate Programs in Adult Education*. Lynn admitted that while she and Buell and the other colleagues in the department have looked at them from a departmental standpoint, even acknowledging there were a couple of the standards lacking in the department, “we've looked at ways to improve that, but at this point, we've done nothing about it” [LF TL: 22].

When asked about how the *Standards* have been implemented in the adult education graduate program, Buell referred to the addition of two courses which had been added as a result of a review of the *Standards*, including the leadership course and an international adult education course. Buell said he was not only very familiar with the *Standards*, but also that a current review was underway of doctoral education in adult education using the *Standards*. Pointing to a readily available copy of the *Standards* from a shelf above his desk, he added, “I'll be using those *Standards* to show the benchmarks of where we are” [BU TL: 42-43].

The next question regarded descriptions of experiences in an international aspect of adult education. This part of the interview created more variance between the two participants. On the one hand, Lynn said, “Well, I teach a course in international adult education, and . . . in the last few years, the number of international students has been growing exponentially” [LF TL: 27-29]. She further described the makeup of her current History of Adult Education course, which includes 20 students, whereby there are only three white males and no white females in attendance: “The majority are from other countries . . . or have backgrounds from other countries” [LF TL: 30-31]. Lynn
reflected, “I don’t know that it’s specifically affected my role [as a professor] because my entire professional career, I’ve been dealing with international students” [LF TL: 32]. She described the student population at a previous institution where she worked with “lots of Iraqi, Thai, Taiwanese, Jordanian, and South American students” [LF TL: 33]. She credited the president of that institution for this influx of international students as a result of his involvement with the United Nations and UNESCO. Reflecting on her current position, she said, “For a long time here, we didn’t have that many international students. We always had some, but now it’s just blossomed. And so what I’m learning is different cultures” [LF TL: 35-37]. As an example of the kinds of changes this experience brings to her teaching, Lynn described how much more careful she has become of the colloquial vocabulary she uses in the classroom:

Things like high mucky muck [emphasis added]. I used that term a year ago. I had to look it up so I could tell the students what it meant. It’s an Indian word. It means plenty to eat. This was directed at a culinary specialist. He was the head of this whole dinner. [LF TL: 39-42]

Buell’s response to the same question led to a discussion about the cultural exchange that occurs when international students arrive at an American institution. He recalled a time when a group of visiting scholars visited his previous institution where he was Director of Continuing Education and Public Service. Groups of international medical professionals would often visit in order to receive up-to-date information to take back to their country of origin. On one such visit, a group of 15 or 20 Sudanese interns provided a great opportunity from which he received a greater cultural understanding: “I didn’t have to travel to become global in the area of health profession and continuing education. They came to us in Chicago. When you’re in a big city like [that], doing
adult education, they come to you” [BU TL: 57-59]. Buell emphasized that the lack of
time often precludes international travel, and, in fact, is not really necessary:

If you really want a real global experience, I would not recommend travel to get
[it], because you’re going to get a very isolated view of that country [just] by
visiting. But by bringing a group of them here, then [emphasis added] we would
talk about what we can do in our programs to be more global. To me, that was
very powerful. [BU TL: 61-64]

The visiting interns displayed a distinct desire to talk about their home, to describe the
living and working situations from where they came, and the things that the colleagues
from the United States should know about their country. Buell added “Without question,
there was a cultural exchange. And I benefited more from that than any of them” [67-
68]. With highest respect, this researcher disagreed with the idea that travel is less
beneficial to the idea of a global or international exchange than remaining home and
having the world visit you. The following sentiment was taken from the researcher’s
reflective journal:

My own bias towards the value of my international travel experiences were
evident as I transcribed this part of the interview, as well as the constant
comparative process of returning to this point in time as I analyzed the other
interviews. Of the 14 professors, this was the only comment like that I received.
Yet it was spoken with such passion from such a highly respected professional in
the field of adult education that it must be included here among the other data
provided by other professors who would tend to disagree with this idea.
[Researcher’s reflective journal, 2015]

The final question before shifting to the key competency-driven part of the
interviews asked the participants to describe the term global leadership as each
understood it in their own experience. A variety of responses from Lynn followed. The
first words that came to her mind were related to politics, such as Secretary of State.
However, she paused and suggested that the context of this study led her to expand her
thinking on the construct: “So then it becomes, what role can people take to impact
what’s going on around the world? . . . It’s more about how you can impact people on an individual, personal level" [LF TL: 47-49]. She also considered the idea in terms of the multinational business field, but returned to the personal aspect of affecting change on a global scale from a personal viewpoint: “To me, it’s always been on a personal level, what can I do with my students to make them better understand [the world]” [LF TL: 51-52].

Buell was adamant that there was a lack of clarity in the definition. The leaders of the United States believe themselves to be leaders of global leadership, but that idea was “pathetic” [BU TL: 73]. He emphasized a televised report he had seen years ago which asked a group of futurists from around the world what they thought was going to happen around the world by the year 2010. The document to which he referred was published by the Central Intelligence Agency (CIA), was approximately 100 pages, and included a nice executive summary. Buell highlighted the findings from the report as “right on target, so far” [BU TL: 83] and that “if you want to take the report and put it down to one word, it’s China” [BU TL: 83-84]. China, according to this report, was going to hurt the United States in one way or another; either by succeeding in overtaking the role as global leaders, or by failing and “siphoning off what we had because they’re going to be needy” [BU TL: 85]. Buell believed the only other nation that might emerge as co-partners with the United States regarding global leadership would be India. Finally, when prompted for any other way to describe global leadership as a construct, he said,

I think it’s any group—any group, any agency, any institution that does what the CIA did—and that is to bring about key experts who are futurists and take a look at the world from their perspective. To me, that’s the height of global leadership. [BU TL: 91-93]
**Synopsis of the global leadership competencies.** The material presented in
the following three sections represents the participants’ comments regarding the three
categories of Bird’s (2013) nested framework of global leadership competencies: (a)
managing self, (b) managing people and relationships, and (c) business and
organizational acumen. Each professor discussed the competencies in the order in
which he or she rank ordered them. The data from Lynn is presented first with regards
to the category managing self, followed by the discussion of the competencies of this
category by Buell. The same process is repeated for each of the two remaining
categories of Bird’s framework. A final discussion of the ending interview question is
then presented.

**Managing self.** Lynn began each discussion of the three categories with a
ranking order. For managing self, she provided the following: (1) flexibility, (2)
inquisitiveness, (3) global mindset, (4) resilience, and (5) character. Upon reflection of
the listing, she said, “One of my mantras about adult education is that the most
important attribute that adult educators can have is flexibility” [LF TL: 57-58]. As an
example, she discussed the openness with which she creates her classroom
assignments:

I give them lots of options. The students can select things. Many times, when
students come in, they’re used to being told what to do. I don’t tell them what to
do. I give them options, and it creates a lot of dissonance at first, but then they
get used to it. [LF TL: 59-62]

Lynn insisted that encouraging self-directed learning is a large part of increasing
the competency of inquisitiveness in her students: “People can go off and study things
that they’re interested in” [LF TL: 65-66]. Other aspects of the curriculum that identify
and increase inquisitiveness are independent study and directed research. Lynn added,
“If you’re not flexible enough to deal with adults and you’re not inquisitive, you don’t get around to the global mindset” [LF TL: 69-70].

Describing global mindset in the classroom, she said, “almost all my classes have something with international—international students, for example—in it; certainly the International Adult Education class really gets people thinking about what is appropriate to learn about” [LF TL: 71-72]. Lynn stresses culture and history in that class particularly, “because you cannot understand the current aspects of adult education in another country without understanding history and the culture” [LF TL: 73-75]. She provided two specific examples of classroom activities to highlight this point. Each time she teaches the International Adult Education class, she provides field trips to the local mosque as well as a Buddhist temple, which “turn out to be two of the most eye-opening experiences for students over the years” [LF TL: 75-76].

The competency of resilience is dealt with more on a co-curricular level, where Lynn helps students work through some of their problems associated with adult learning in a higher education graduate program. However, she admitted “Character—I guess I don’t personally go into as much about ethics” [LF TL: 82]. In her classes, Lynn discusses issues such as plagiarism, personal values, and the myriad of issues that come up in the personal writings that take place during the length of a course, adding “they are responsible just in terms of doing their own activities and things” [LF TL: 84-85].

Wrapping up the category of managing self, Lynn added a few co-curricular elements to the discussion, including the study abroad trips to Sweden (global mindset
and flexibility), attending conferences, particularly the International Adult Education Pre-Conference (IAEC), as well as other international conferences.

After reviewing the five competencies associated with the category managing self, Buell’s first reaction was an acknowledgement that they are all “solid” [BU TL: 97]. He added, “it’d be difficult to rank order them, truly, because they’re all necessary” [BU TL: 97-98]. Students would want to continuously improve their competency level in all five areas if possible. His rank order for this category was as follows: (1) resilience, (2) inquisitiveness, (3) flexibility, (4) character, and (5) global mindset. He emphasized global mindset was not last because it was unimportant. There is a hope that the students arrive in the program with resilience and inquisitiveness, that those are things he looks at for at admission, because it would be very difficult to succeed as a graduate student without these two competencies right away.

However, Buell stated that flexibility was a competency in which improvement was possible with the help of faculty and the design of the program. He teaches flexibility by always providing questions which have more than one answer. Character was another competency he believed can be improved, primarily through the experiences provided by the program: “Character usually comes from experiences. So the best thing you could do is provide them with the experiences where they’re going to have to shine in order to get the job done” [BU TL: 116-18]. Examples of these kinds of experiences include internships, helping with research, helping with teaching, and shadowing—particularly if the faculty member also has an administrative role in the institution.
Buell suggested starting with geography as an entry into expanding global mindset: “Just got to get out of Peoria, so to speak” [BU TL: 129-130]. Deal with the areas of the United States that seem foreign to the students, for example Hawaii and Alaska, and continue expanding the conversation beyond the known borders of the students as they exist in the classroom. He suggested then move from the concept of geography to conversations about what is taking place within those areas.

*Managing people and relationships.* Lynn admitted that the second category of Bird’s (2013) framework was more challenging to address. However, she began the discussion with the following rank order: (1) valuing people, (2) interpersonal skills, (3) empowering others, (4) teaming skills, and (5) cross-cultural communication. Lynn communicated the value she places on showing respect for people and respecting differences in the classroom. One of the activities she undertakes is to use Rokeach’s instrumental and terminal values survey, making her students rank order the values and share the results with each other. Lynn admitted it was hard to differentiate the ranking order between valuing people, interpersonal skills, and empowering others: “We empower people by respecting them; so I see a lot of overlap in those three areas” [LF TL: 102-103]. Teaming skills and cross-cultural communication, meanwhile, permeate the entire educational process: “So within classes, a lot of all five of them are employed” [LF TL: 105].

Continuing the discussion of the competencies in this category, Lynn said,

I always have them do group work. I’m a person who hates group work myself, but I still make them do it because it’s so crucial in anything in adult education—and they learn to either work with people or not work with people. [LF TL: 106-108]
Describing the process of assigning teams, when applicable Lynn always makes sure that the groups are as mixed as possible with regards to background, gender, and nationality. Regarding interpersonal skills, she proffered discussions of topics such as emotional intelligence (EQ) and learning styles. Her Learning Styles course, in fact, is designed to allow students “to become more self-aware about themselves and their idiosyncrasies related to learning and how other people learn” [LF TL: 112-113]. One of the specific examples she offered with regards to the competency of cross-cultural communication is the concept of cultural quizzes: “Everybody finds it very interesting. They don’t have to be [about] other countries, but a different culture within the U.S. I’ve never yet found any student who doesn’t enjoy it” [LF TL: 116-117].

Rounding out the discussion of the category managing people and relationships, Lynn offered examples of co-curricular elements in the adult education program, including her Thursday drop-in night where “anybody can come in and they can sit and talk . . . and help each other” [LF TL: 119-120]. There have been times when this activity led the students to create study groups or dissertation support groups of their own, often meeting on Saturdays or Sundays, indicating a high level of respect for each other and the common situation in which they find themselves. Lynn cited conference attendance, presenting, and networking as examples of empowerment, often allowing the students to increase their self-confidence and networking skills by pushing them out of their comfort zone. Additionally, she places a high value on her role of advising in relation to empowering her students.

The conversation regarding the second category of Bird’s (2013) competency model generated a lot of energy for Buell. After reviewing the five competencies
associated with managing people and relationships, Buell immediately expressed his reservations regarding the competency *empowering others*. His first comment regarding this part of the discussion was

> I believe we can't empower anybody: They have to empower themselves. All I can do as a faculty member is to do my best to create an environment where that can happen. It doesn't necessarily happen and I have no control over that. So people empower themselves. [BU TL: 136-139].

He then described the environment necessary for empowerment to take place. This included helping the student to increase self-efficacy, although he hesitated at this point, stating that those concepts are similar but often separate. Coaching, he said, was something that came naturally to him. He discussed his role as a sports coach in basketball, swimming, soccer, softball, baseball, and football. The skills of sports coaching transferred to the area of professional coaching, providing sessions with assistant football coaches and graduate assistant coaches in the institution which led to stronger team building exercises.

Realizing he had begun with the least important of the five competencies, Buell shifted back to rank order the remaining competencies in the category. Acknowledging it was challenging to rank the competencies because they were all so important, he came to the following list: (1) valuing people, (2) interpersonal skills, (3) teaming skills, (4) cross-cultural communication, and (5) empowering others. Valuing people was number one because “if you don’t value people, you can forget all the others” [BU TL: 150]. He added he runs into so many people who do not value other people, resulting in the situation where there is a lack of value for themselves: “If you don't value yourself, I question whether you can value anybody else. You may look up to them, but I don’t know if you really value them.” [BU TL: 152-153]
Regarding interpersonal skills, teaming skills, and cross-cultural communication, Buell placed near equal emphasis on all three, claiming it was difficult to create a hierarchy between them. However, he reiterated the following about empowering others: “Empowering—creating an environment for people to empower themselves—[would] be the last one there. It’s the most difficult to achieve of these five, I think” [BU TL: 163-164].

Buell took this opportunity to mention a few areas he felt was missing from the category of managing people and relationships: “It’s interesting that valuing critical thinking isn’t there” [BU TL: 166]. Another area he asked about was valuing diversity: “When I wrote my book on the effective continuing professional education in transition, I had chapters on just those areas” [BU TL: 169-170]. Finally, he mentioned being technologically efficient in today’s world as being a necessary part of leadership.

The researcher prompted Buell for further examples of how to develop the competencies of this category in the curricular or co-curricular elements of the adult education program. He immediately responded that if you are online, you do collaborative learning:

You do collaborative learning in everything you can do. What that means is that you provide them with a trigger. It could be a paper, it could be a chapter, but you give them a trigger in order to get them to communicate with each other, and with you. And that to me is the number one thing. What I find most about those online classes I do that way is the growth of the person from day one until the final, and you can see by their postings how much they’ve grown. It could be that they were always in the first three [to post], or that they were last to post, but at the end, they may be the first to post. [BU TL: 176-182]

*Business and organizational acumen.* Lynn began the discussion of the final category of Bird’s (2013) framework, business and organizational acumen, with the following rank order: (1) leading change, (2) vision and strategic thinking, (3) managing
communities, (4) organizational savvy, and (5) business savvy. She said she always wished she had a good way to measure the change in her students’ self-concept from the beginning to the end of the program: “The change I see is astronomical” [LF TL: 149-150]. She described a specific example of an international student who started the program as a “[whispering] meek, quiet, afraid to talk student—and then a few years later, they can get up and talk to anybody and hold their own” [LF TL: 151-152].

Another example was a student from a previous institution who came in as a competent nurse, but had such a low self-concept as a doctoral student, feeling like she was starting all over. Through the experiences of the adult education graduate program, this student changed from “being thought of as a cookie baker to the dragon lady” [LF TL: 156]. Smiling, she added, “As students develop more self-confidence, they’re out there shining” [LF TL: 157-158]. Finally, she described the process of teaching her students how to write a dissertation, from the slow building of an idea through the structure of the manuscript and into solid researchers.

With regards to the competency of vision and strategic thinking, Lynn described various ways in which students are prepared for the job search throughout the program. From writing articles, to doing conference presentations, to helping with teaching classes, to building vitas and resumes, she helps students gain the experiences they need “to go on long range” [LF TL: 167].

Mentioning once again her Thursday night drop-in as an example of managing communities, she described the rich interaction between the students, creating new contacts—often meeting each other beyond the Thursday night opportunity, and the support groups many of her dissertation students form to help each other through the
process. Additionally, there have been intense communities formed by traveling to conferences together and making contacts with other professors in the adult education field around the world: “And sometimes it’s paid off with job interviews” [LF TL: 183].

The competency of organizational savvy created an interesting discussion about learning how to work and communicate with other professors during the students’ time in graduate school: “One of the things I always point out in my classes is that people need to be politically savvy, that they need to know how to appropriately operate within the university setting” [LF TL: 188-189]. She went on to describe one student who told one of the professors on her committee there was no need for what he was teaching. This, of course, resulted in a difficult exit from the qualifying exam phase of the student’s studies:

Professors have egos, or they wouldn’t be in front of classes all the time. And so, you don’t insult a professor. You have to be careful. There are some people you don’t want to criticize, and there are some people you don’t want to disagree with, and you have to learn who the people are that you can disagree with who won’t hold it against you. [LF TL: 195-198]

She continued,

In the doctoral program, we teach students to think. We teach them to have their own opinions. You don’t have to agree with me. And people are afraid to critique things or say things that disagree with me. I don’t care. And they learn that. But they go to other professors and other departments who hold that against them, and they have to learn the difference, they have to learn how to read people. People who don’t learn to be politically savvy within a university are the ones who don’t make it through. [LF TL: 198-205]

Finally, with regards to the competency business savvy, Lynn described a number of ways in which she helps her students prepare for the job market. This includes developing their own vita and resume, doing conference presentations, submitting proposals, and writing book reviews or journal articles for publication. In
terms of a global workforce, she emphasized “getting people sensitive to the differences in culture, because if students have never travelled outside the United States, then some of the cultural quizzes from other countries almost blow their mind” [LF TL: 217-219].

After an extensive review of the five competencies associated with the final category of Bird’s (2013) framework, Buell provided the following rank order: (1) vision and strategic planning, (2) leading change, (3) organizational savvy, (4) business savvy, and (5) managing communities. Although vision and strategic planning was clearly the most important, he felt that adding the idea of mission was just as important for adult education programs today. He described a “vision and mission and values clarification” that MGU’s College of Education is currently creating, and in which he is currently participating: “To me, it’s very important for an adult education program, and the department of adult education if there is one, to do that because I think the Deans and the Provost are looking for that” [BU TL: 192-194]. He emphasized the need to update the document each year:

So many people that do visioning and do strategic planning just put the document on the shelf, and revisit it within a time period and say, “Oh, I guess we forgot to do that or whatever, why didn’t we get to that?” These have to be living documents. [BU TL: 194-198]

He remembered the statement from Ford Motor Company, *Quality is Job One* posted on every wall in the plant. That way, according to Buell, an organization can see “to what degree the unit has inculcated those values” [BU TL: 201]. Finally, with regards to this competency, he stated, “So the number one thing of visioning and strategic planning is you got to have buy-in. If you don’t, they’re worthless” [BU TL: 202]. As a way to ensure buy-in, he suggested a visioning committee:
You need a group of people that you would select. . . . If you only have a limited number of faculty, well then get faculty from other units . . . that you work with. For example, if we were to do a vision and mission strategic plan here for adult education, we would definitely involve one or two people from research and measurement . . . probably one quantitative and one qualitative. [BU TL: 205-209]

At this point, Buell paused and contemplated his next thought before saying “As far as leading change, there’s no use getting together unless you want to talk about change” [BU TL: 213]. He clarified, “Unfortunately, some faculty in some adult education departments get together to maintain the status quo. They do not want to change” [BU TL: 214-215]. As an example, he described a situation where there was a course that had been in the curriculum for 17 years, but even though it had not been taught in years, the faculty insisted on keeping it in the curriculum “because you just never know when you’re going to need it” [BU TL: 216-217]. Buell claimed to have heard similar stories at every institution he’s been a part of: “There’s a group of faculty who just want to hang on to what was. But if you’re leading change, you can’t hang on to what was” [BU TL: 218-219].

Next, the conversation turned to the competency of organizational savvy. Buell insisted that it was incumbent upon the faculty of adult education programs to get involved in other areas of the institution: “If the adult education program is not only going to survive, but thrive, the faculty have to get more involved in other things besides adult education” [BU TL: 224-225]. He described his time at a previous institution when a fellow faculty member began the human resource development component to the program and created alliances with the College of Business. Another colleague became head of international education to the College of Education. He went on to describe other colleagues who were involved in extended roles and activities such as
Dean and Associate Dean of the College of Continuing Education, and Head of Black Studies: “What I’m getting at is that everybody had a major role outside of adult education, which made it almost impossible for the institution—the naysayers as well as the supporters—to do anything but promote the adult education program” [BU TL: 235-237].

Buell then leaned in and said, “Anytime [you] only value yourself and what you do with your students—which is important—you’re going to lose your program” [BU TL: 238-240]. The President at his former institution use to say, “I didn’t hear anybody telling me that the adult education program needs to exist from the state capital. I don’t hear the voices. I don’t hear the voices” [BU TL: 241-243]. Emphasizing the need to be vocal for change leadership not only on campus, but also “with the people who hold your purse strings” [BU TL: 243-244] in the state legislatures, he leaned back in his chair and admitted that the program at his current institution hasn’t done well in this area: “It’s a big void, because I don’t think there’s anybody in Tallahassee that frankly knows much about us here . . . in adult education. And that’s a big weakness” [BU TL: 245-246]. Reviewing the competency of organizational savvy, Buell reiterated the importance of getting more involved, indicating that was the reason he chairs the faculty council: “I did it to promote adult education and higher education [departments]” [BU TL: 249-250]. The imperative is to “make yourself visible and indispensable. In that way, your program will rise” [BU TL: 250-251].

Shifting to the competency of business savvy, Buell said that you have to “make it impossible to get rid of the program” [BU TL: 254-255]. The emphasis on the Standards were nice to have, and they can be used as a tool to build the program, “but
they won’t keep your program” [BU TL: 256]. It does not matter how well the students scored on the GRE or what kind of employment they have when they come into the program, the relationships that you build with the community is what is important. He emphasized the need to improve the element of internships in the adult education graduate programs, as well as incorporating courses from other graduate programs at the institution. Now that his current institution no longer has the requirement for a cognate, “we’re going to have to find another way to get the students involved with students from other programs” [BU TL: 275-276]. I prompted with the word self-contained, and Buell agreed that was a great explanation of what he was describing.

When reviewing all three categories of Bird’s (2013) framework, Lynn said managing self was clearly the one she perceived to be more important for the future success of the students, followed by managing people and relationships and business and organizational acumen. With regards to this study, she believed that cross-cultural communication and global mindset were the most relevant competencies: “I found that students who are not exposed to . . . other cultures have very narrow mindsets. And I don’t like that. I will admit that” [LF TL: 235-236]. From an adult education perspective, the competencies of flexibility and inquisitiveness are crucial. While she did not say that any of the competencies were irrelevant for the problem, she admitted that the competencies dealt with least often within the adult education program are those following under the category of business and organizational acumen:

Yes, students have to think about their dissertations; yes, they have to be politically savvy within their organization; and they have to learn how to manage groups of people on the international stage, but I don’t think we teach that as much as some of the other areas. [LF TL: 243-245]
Buell’s final review of the 15 competencies detailed which of the competencies he felt were most valuable for the future success of the students, as well as whether or not he felt any of them were irrelevant for the program. He quickly responded, “They’re all relevant. They’re all relevant” [BU TL: 287]. He added, “You would hope that when the students enter the program, they have the managing self [competencies] covered . . . so you can concentrate on the other two [categories]” [BU TL: 289-290]. He described his role as the head of the admissions committee at a previous institution, and the characteristics they looked at in the interview and the material submitted by the students, often containing elements of inquisitiveness, global mindedness, responsibility, care, and resilience. Of the other 10 competencies, the faculty need to be more cognizant of the organizational savvy competency: “If the faculty does that, the students will see that and will role model that” [BU TL: 299-300]. He again used the word indispensable, referring to the goal of the student when they leave the program and enter the workforce. Additionally, he emphasized the importance of leading change, “Helping people to understand that the status quo is something that cannot be [under]valued” [BU TL: 305-306]. Finally, he emphasized the role that collaborative learning plays in helping students manage people and relationships better.

Although he had previously spoken on the issue of missing competencies in the model, he restated the areas of critical thinking, valuing diversity, and mission planning in the discussion. As the interview was coming to a conclusion, Buell mentioned the importance of finding the future of adult education: “It’s those adult educators who are on the fringe of the field, doing weird things that the others aren’t doing. Because you know what, they will end up becoming the future of adult education” [BU TL: 323-325].
He always has his eyes open for who they are, who’s out there forging new tracks, doing new things, and “being weird. I love them! That’s the future. Without those people, we have no future” [BU TL: 325-326].

The final interview question dealt with envisioning the ideal version of the adult education department from an appreciative inquiry perspective. Lynn mentioned specific areas which would meet that vision: “We would have faculty from other cultures. And I would say specifically from other countries, not just other cultures” [LF TL: 251-252]. A second area that would fill the gap would be “younger faculty, preferably who really like developing online activities—because that’s the wave of the future” [LF TL: 252-253]. With regards to implementing a global emphasis in the curriculum and the program, she said at the moment, the primary source for this comes from her many international students. She believes an increase in international students would deepen the global learning experience of all the students. Finally, because she travels internationally extensively, she intentionally brings those experiences into the classroom as well.

Buell’s response to the final interview question was straight-forward: “Everything you do has a component of international education” [BU TL: 331]. Just as Lynn suggested, this would include a contingent of international students in the program from many different nations. Then he suggested you should have faculty who are raised or experienced in another culture—to be diverse in your faculty. His next suggestion was to make sure the curriculum has the courses and activities that point toward international education initiatives. Certain international experiences in conferences could be a part of that as well.
Following students, faculty, and curriculum are the programmatic elements, including study abroad opportunities and international student initiatives at the university, and finally, grants and contracts that have an international component: “Those are the keys: The student, the faculty, the curriculum, the organization—connections have to be in all four” [BU TL: 356-357]. The interview concluded with Buell stating the interview protocol was excellent and it helped to bring out things that he did not originally think to say.

**Case 2: All-embracing State University (AESU).** “There doesn’t have to be some magical, tangible result that comes out of [the research]. I just want you to have an orientation to an open mind to learning. That’s what we’re all about here—learning” [RW TL: 23-24].

**Overview of Case 2.** AESU is a public research university located in a major city in the southern part of the United States. The university is committed to student learning, research, entrepreneurship, innovation, and creativity, preparing graduates to succeed in a global market. The university has been designated as a top-tier research institution. According to the university website, AESU is dedicated to enriching the lives of the local and global community. As of Fall 2015, the student population of over 55,000 ranks as one of the top 10 largest public research universities in the nation. According to the Annual Survey of Colleges in 2015, the student diversity profile of AESU indicates that the student population is made up of 70.4% Hispanic/Latino, 12.9% Black/African American, 10.2% White, 2.8% Asian, 2.3% multi-race (not Hispanic/Latino), and 1.4% other minority groups. Additionally, 5.2% of the students are designated as international students hailing from 144 countries. The university is
number one in the nation in awarding bachelor’s and master’s degrees to Hispanic students, number six among international business programs in the nation and, according to Washington Monthly, ranks number 17 among the top universities in the country. The mission of the institution declares a commitment to serving its students and the diverse population of the region, as well as to high-quality teaching, state-of-the-art research and creative activity, and collaborative engagement with local and global communities.

According to the institution’s 2013-2018 Strategic Plan, the attributes that define AESU include vibrant, community-focused, entrepreneurial, global, and accessible. AESU aims to contribute to the economic and social well-being of the state with a local and global reach. The process of building preeminent programs will strengthen AESU’s capacity to provide high-quality teaching, engage in state-of-the-art research, and collaborate with local and global communities. Committed to providing a state-of-the-art education for traditional and non-traditional learners – locally and globally; AESU has undertaken an institutional-wide initiative of internationalizing the undergraduate education. The Quality Enhancement Plan (QEP) proposes curricular and co-curricular initiatives which provide students with multiple opportunities for active, team-based, interdisciplinary exploration of real-world problems. Specific learning outcomes include global awareness, global perspective, and global engagement. More than 140 global-learning courses have been developed by faculty across nearly every department. Students in global learning courses enhance and extend their scholarship through participation in integrated co-curricular activities. Ultimately, graduates of the university
will be empowered with the knowledge, skills, and attitudes they need to become informed and engaged citizens of the world.

For the purposes of this study, AESU supports a department focused on adult education and human resource development (HRD). According to the departmental website, the stated goal of the program is to prepare professionals to facilitate individual, organizational, and career development and the advancement of adults in the nation and the world. There are two cognate options available within this program, an open cognate custom designed for the student’s individual research agenda or a directed cognate in one of six areas: (a) international and intercultural education, (b) labor studies, (c) urban education, (d) entrepreneurship, (e) hospitality and tourism management, and (f) recreation and sport management.

The program emphasizes the writing process heavily. The departmental website states:

Graduates are equipped to administer, design, and facilitate programs for adult clients, employees, volunteers, students, and associates of profit and not-for-profit organizations. Graduates are professionals who may be engaged in program development and evaluation, planning, policy development and analysis, leadership, instruction and training, counseling and advisement, consultation, and marketing and recruitment activities designed to further the growth and development of adult learners.

Participants for Case 2. The two participants interviewed from AESU are full-time faculty in the master’s and doctoral programs focused on adult education and HRD. The first interviewee is Dr. Robert Williams [pseudonym]. He is the Associate Dean of Graduate Studies for the College of Education and is a professor of adult education and HRD. He received his Ph.D. in 1997 from an accredited institution in the eastern part of the United States. He has been at AESU for eight years, having served
as a department chair for three years in the Department of Leadership and Professional Studies before becoming Associate Dean in the College of Education.

The second interviewee from AESU is the Graduate Program Director for the department, Dr. Joyce Kilpatrick [pseudonym]. She is also the Director of the Office of Academic Writing and Publication Support for AESU. She received her Ph.D. in 1997 from a major university in the Midwestern United States. She has been at AESU for 15 years. See Table 9 for an overview of the demographic information for the participants of Case 2.

Table 9

Demographics for Case 2 Participants

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Robert Williams</td>
<td>Male</td>
<td>Ph.D.</td>
<td>8</td>
<td>Dean of Graduate Studies for College of Education</td>
</tr>
<tr>
<td>Dr. Joyce Kilpatrick</td>
<td>Female</td>
<td>Ph.D.</td>
<td>15</td>
<td>Graduate Program Director</td>
</tr>
</tbody>
</table>

Both interviews took place successively on a hot July afternoon in the private office of each professor. Both professors had just completed a final dissertation defense when I arrived. Comments about that dissertation entered into each conversation, as the content and research process was directly related to the phenomenon under inquiry. Both professors were extremely gracious with their time,
their thoughts, and offered full support for the completion of this research project [Field notes, July 2015].

**Synopsis of the global leadership competencies.** When the date and time for the interviews were established, both participants said they were able to offer no more than an hour of their time. For this reason, and because the researcher wanted to make sure that both interviews were completed before Joyce had to leave for an important invitation-only function on campus, the interview protocol was modified and the proceeded directly to the key questions regarding the global leadership competencies associated with Bird’s (2013) nested framework. The following data addressed all 15 competencies, beginning with the competencies associated with managing self, followed by managing people and relationships, and ending with business and organizational acumen.

*Managing self.* The first competency discussed was inquisitiveness. Throughout the program, this competency can be seen in the discussions and interactions that take place both between the professors and students and among the students. For example, Joyce told a story about a recent conversation that took place at the end of a dissertation defense. The dissertation was a study on lesbian identity development and how being at a historically Hispanic-serving institution affects identify development. One of the guests at the dissertation defense was a young student who had just recently been accepted into the program. Joyce spoke of this student’s desire to inquire deeper into the research agenda of the defense, and his desire to relate it to research papers that he had written on why some gay men choose to pledge to straight
fraternities and some men choose to apply to exclusively gay fraternities. Joyce explained how interactions such as this reflects the competency of inquisitiveness:

There are four of my students sitting together and the conversation that happens after he mentions this is . . . one of those students pipes up and says, “You need to reshape that and publish this paper.” . . . So I think this inquisitiveness is definitely played out in terms of our students. [JK TL: 12-16]

Both Robert and Joyce emphasized the value of curiosity and individual choice with respect to assignments within the classroom. Robert spoke of a colleague at a prior institution who required all of his students to write about the specific research agenda in which that professor was interested: “Job satisfaction, not job performance. Job satisfaction, all of them. That’s what he worked in. I would lose my mind!” [RW TL: 17-19]. Robert went on to explain: “That’s one of the beautiful things about this job, is that we’re pretty broad. Adult education is a huge field. HRD is just a small part of it, really” [RW TL: 18-20]. For example, when describing the assignment of writing papers in any given course, Robert said,

I always let them take what it is you want to do your research about. The most powerful motivator is something you want to do, within the confines of the course. // I want them to be genuinely interested in it. [If] they’re interested in it, they’re going to go explore and really do their best job in it. I definitely do that. [RW TL: 10-14]

Similarly, Robert spoke of the major project that takes place during the program's Internship course:

We make sure people go out and do a project of their own choice. They have to find someone who will cooperate, like a local business or a religious institution. They have to go out and do an internship project. Again, it has to be something that works for them, that they’re interested [in] and they’re curious about. [RW TL: 28-32]
Joyce agreed: “I do most of it around writing and encouraging writing. // But still, that managing of self is around creating a research agenda and taking what you have and what you know and turning it into something else" [JK TL: 17-21]. Robert added,

It has to be curiosity-driven. There doesn’t have to be some magical, tangible result that comes out of it. I just want you to have an orientation to an open mind to learning. That’s what we’re all about here—learning. [RW TL: 21-24]

The second competency discussed was global mindset. This researcher felt that there was a different approach to this construct between the two participants. Robert was very optimistic about the direction the program was heading in this regard. Although he wished the program had a designated International HRD course or an International Adult Education class, he acknowledged that, as a whole, the institution was dedicated to the path of a more international curriculum: “We’re into it. It’s a big deal on this campus. All undergraduates have to take global learning courses, upper-level global learning courses. It’s a huge, huge, huge deal” [RW TL: 36-37]. Robert explained the way he includes more of an international feel to his courses is through the assignments, specifically the articles and research he assigns for readings and discussions:

A lot of the articles that I assign, they talk about expats, for instance, or they talk about research that was done in Taiwan, in Korea, or in Cuba. Most of the work I assign is outside the U.S. There’s nothing wrong with the U.S. I want them to see it’s not only—. We just did this study in Ireland, for instance. What’s great about that? Well, I mean, how much research is really done there? What’s the contribution of doing research there versus doing it in Germany or wherever? We always do things like that, at least in my classes. [RW TL: 44-49]

Robert added, “The whole notion here is that we need to have research that is not so U.S.-centric. I want them to feel comfortable looking at research from all over the world, and that’s what we do” [RW TL: 54-55].
Robert also spoke about the use of a new book on international human research development which was edited by Joyce and is used in the program:

It’s important that [the students] have that perspective. It’s that international, global, ‘Hey, we’re not alone out there.’ We’re not. Even this book, which is in my current course, which is Trends and Issues in Human Resource Development, this book has stuff about the international context of national HRD and all that stuff. Again, I know this is HRD, but that’s part of the field. [RW TL: 58-64]

The conversation with Joyce regarding global mindset was very different. She began by asking about how the term global should truly be defined. From her perspective, it is just a substitute word for colonization. “We have always been global,” [JK TL: 36] she said. “We’ve just been limited in our global ability in terms of how far our ships can sail and where we can send our soldiers, because that’s an integral part of our being global” [JK TL: 36-38].

Joyce then spoke of the difficulties that students have in general with expanding their mindset from the expected norms. As an example, she described one course in which she was teaching beginning qualitative methods. The topic at hand was criterion sampling, and Joyce was explaining the concept in simplistic terms: “[It’s] really not that tough. It means you’re picking your sample based on specific criteria. And they looked at me like I was nuts. And then they also demonstrated, as a whole, levels of incompetence around certain things” [JK TL: 44-46]. She continued,

I just said, “This puzzles me. What happens to you guys from the minute you get out of your car ‘till you walk in here, because when you were in your car, you were smart. You were in control. You had a strong sense of self. You walk into this room and you’re blithering idiots. What happened? Why did you put on this persona of diminished individual? Of lesser being?” [JK TL: 46-50]

Joyce also spoke of the struggle students have with transferring adult teaching methods to other areas of workplace experience, such as corporate training: “[The
Joyce described the mindset of these students when she speaks about writing, which is a predominant activity in her coursework:

Students will dismiss writing because it’s *for school* [emphasis added]. . . . And I say, “Don’t you have to write memos? Don’t you have to write reports? Don’t you write emails at work? If you make the same errors in those forms of communication at work, you look like an idiot.” [JK TL: 58-61]

Joyce said the problem is that students “compartmentalize all of these things so that when you take this to the next step—these competencies—can they use these in an international context? Who knows?” [JK TL: 64-66].

All of these examples of students struggling led to an insightful discussion about Joyce’s idea of global mindset in the classroom. She said, “A global mindset means that you consider the identity issues of the people around you, because those issues matter, however you define them” [JK TL: 105-106]. She emphasized this definition with a couple of detailed vignettes describing how she permeates her courses with an incorporation of human rights, specifically gay rights, and the subsequent breakthroughs she has seen as a result of persistent, continuous, open discussion of these important issues. While some professors may compartmentalize discussion of sexual minorities within a small portion of a given class, she raises this issue in every class. Other people may think

it’s not something that is global. It’s something that should be pigeon-holed and only given X amount of time, but that’s bullshit. You have straight men. You have gay men. You can have lesbians. We have all of these people and we’re all together, and no issue is really straight or gay. They’re global. [JK TL: 78-81]

She even incorporates geographical issues into the discussion, discussing gay rights in different countries and cultures and within the global workforce. However, she was still
unsure as to whether or not the students were successfully able to take these discussions and transfer the meanings into a global context in other areas of their lives and work experience. In the end, though, Joyce recalled a specific moment when she felt like a particular student was feeling uncomfortable as a result of the “homophobia” and “nonsense” discussion that was going on in the classroom. Joyce said,

I looked at them all . . . and I said, “How would you feel if you’re in this room right now listening to all this stuff and you’re a gay man or woman?” And they all took a step back . . . and started to really think about it. And I saw a change in all of their presentations from that point on. They all took time to think about whatever their presentation was going to be in terms of gay and lesbian issues, and other issues, other people’s identity that might be influenced by whatever it was that they were talking about. Now that particular class, I think I had some influence on global mindset. [JK TL: 97-104]

The third competency discussed was flexibility. Both Robert and Joyce agreed that this was a necessary aspect of student success in a graduate program. Joyce spoke about the necessity for her students to adapt to her unique style of teaching and mentoring in her role as a professor in the program: “I am hard, but I’m also helpful” [JK TL: 112]. Robert mirrored that sentiment when he said, “I’m there to walk them through and help them through. You’re getting at the flexibility to be able to feel comfortable to do things like that” [RW TL: 84-85].

Joyce spoke about how the students had to negotiate through the power differences between them and the faculty with regards to teaching choices made in the classroom as well as design decisions in the adult education graduate program. Additionally, Robert talked about the need for students to become more comfortable with risk-taking and experimenting, often a result of being pushed out of their comfort zones as a result of assignments or decisions made by the faculty in the program.
A few specific curricular elements were discussed by both faculty members regarding this competency. Joyce described a requirement in the Organizational Community Processes course whereby the students have to create an organization to solve some problem in the community: “They have to come up with the problem and they have to come up with the solution, and they form an organization” [JK TL: 131-132]. Joyce said that a lot of flexibility is demonstrated in this particular process.

Finally, Robert talked about how he negotiates the assessment process for assigning grades:

I try to model the flexibility as an instructor, because we get to negotiate, for instance, the task that we’re going to do for the course. I’ll say, “I’d like to have a paper.” Usually, we have a paper, but we have exams or we can do a learning journal, this list of things. Then we negotiate that. If we’re doing an exam type of approach, I’ll say, “What kind of exam would you like?” I don’t care. “Do you want multiple choice? Do you want short answer? Do you want long answer? Do you want take-home?” I don’t care. Only option that is unacceptable is not one at all. We don’t do that. That’s how I do it. Seriously. That’s exactly what I do. Been doing it for all these years. [RW TL: 90-97]

Robert said that the students really appreciate that kind of flexibility demonstrated by the faculty: “I think that brings out the best learning. Break down the barriers. Let’s just get in there and have a good time and learn” [RW TL: 102-104].

The next competency discussed was character. Both Robert and Joyce agreed that this particular competency was not addressed as much as it could or should be. Joyce said if it was discussed at all, it is with the understanding that character, morals, and ethics are culturally and contextually defined. And that if she discusses these issues with her students, she is clear to state that these are her sense of what is moral and right. She added, “I mean we all have to work within our own value system” [JK TL: 151].
Robert was more adamant that, with one exception, this competency is not addressed much at all in his classes. That one exception is in a course he teaches called Organizational Learning and Human Resource Development, where ethical dilemmas are discussed as a result of case study analyses that take place each week: “That’s the only course I know of in the program that we get into these ethical dilemmas or ethical issues” [RW TL: 112-113].

The final competency discussed under the broad category of managing self was resilience. Both faculty members were able to provide specific best practices within the curriculum that demonstrates student development of this competency. For example, faculty support was mentioned by both professors in terms of ongoing discussions and providing tools to build self-confidence and competence. Some of these tools include guides for making great presentations as well as support for the writing process, particularly book reviews, papers, and journal articles for submission to publication.

Joyce’s first inclination was to say that she does not really care about whether or not the student’s lifestyle is healthy or not, simply because that is not within her control. However, upon further thought, she spoke about the process of helping students through the entire program, and how that could really benefit this aspect of their academic career. From sending the packet of information when they first inquire about the program, to more detailed support offered once she has become assigned as their advisor, to detailed conversations about her own success and failures that take place within the classroom, Joyce showed a remarkable sense of support for student success. She specifically mentioned portfolios as one curricular best practice to increase resilience:
It’s stuff that they had to do throughout the term, but it’s also stuff beyond the term. Because I want them to start with a storage system, to keep artifacts of their teaching or to keep artifacts of their skills—their knowledge, skills, and abilities—okay? And so that they have these artifacts on hand, they go for an interview, their relevant to what they’re doing. And putting that together for some of them really helps with their self-confidence, because they start to see that they actually have done things. [JK TL: 192-197]

Likewise, Robert emphasized the value of this competency. He acknowledged the prospect of writing papers and doing presentations are not natural for many of his students. The point of his offered support is to offer all the help necessary for student success: “The deal is I want you to leave all your fear out there, and all the other stuff. Come on in here, and work with [me]. We’ll get you to the next level. That’s what we do” [RW TL: 141-143]. According to Robert, that kind of faculty support is “walking the walk in adult education. It’s about confidence-building” [RW TL: 145]. From a program perspective, the Internship course offers a major opportunity to increase competency in resilience. The students have to take what you’ve learned and negotiate this project with some prospective organization. They go out and they build. Again, they put training programs together for people, put things online for people. You have to be ready for some criticism and so forth. I think that’s another way we get at it at the program level. [RW TL: 154-157]

Managing people and relationships. The first competency discussed within the category of managing people and relationships was valuing others. Both Robert and Joyce offered similar thoughts with regards to how this is addressed within the curriculum. Both professors said that this competency is addressed in the selection of topics for the coursework and in the selection of readings. The readings come from a range of cultures and fields of study, including anthropology, sociology, and psychology.
Topics of discussions that facilitate this competency include identity, culture, and power.

Joyce added,

To me, valuing people also comes with the recognition of when a person holds power over [you], and how you use that. Also, valuing people is whether or not you understand differences, whether you are even curious about those differences, in engaging conversations about them. [JK TL: 208-211]

Robert said that he puts a lot of emphasis on this in his class. He spoke of the idea of workplace incivility: “There is an incivility, not just in the workplace, but also in classrooms between your peers, between the instructor and the student, and the student and the instructor. Civility is all about mutual respect” [RW TL: 171-173]. He added, “If I don’t respect you, you’re not going to respect me, and it goes downhill from there” [RW TL: 173-174].

The next competency within the category of managing people and relationships was cross-cultural communication. Robert emphasized the nature of the student population:

One of the beautiful things about being here at [this institution] is that everyone is from everywhere else. It’s a Hispanic-serving institution. Roughly, 70% of our students are Hispanic, but that doesn’t mean anything here. Hispanic [emphasis added] means nothing. There are so many different ethnic groups. You’ll see Panamanian. It’s not so many Panamanians, but Nicaraguans. You’ll see very few Mexicans, almost none, which is unusual. It’s more the Cubans. It’s some Ecuadorians, a lot of Peruvians, a lot of Colombians. There are some Brazilians. There is quite a large Caribbean population here, quite a bit. Every class is this wonderful exercise in cross-cultural understandings. [RW TL: 185-191]

A lot of the issues surrounding this competency naturally come out of the articles and readings, as well as the selection of research topics for dissertations. In fact, both professors spoke of a dissertation defense that had just taken place earlier in the morning. The dissertation described conflict management styles with immigrant Jamaicans and how that is linked to how the immigrants perform in the workplaces. In
addition to the discussion regarding this dissertation as an example of how cross-cultural communication is addressed in research, Joyce also briefly discussed courses in cross-cultural communication that are required in the Certificate in Conflict Resolution, which many of the students in the program take in combination with their master’s degree.

The next competency discussed was interpersonal skills. According to Robert, this is an extremely important aspect of student success. Though the technical skills will get you in the door of a new job or position, “you’d better have good interpersonal skills because nobody’s that good” [RW TL: 210]. While Robert emphasized classroom discussions related to interpersonal constructs such as emotional intelligence, Joyce had a completely different feeling about this. As soon as the researcher began talking about this competency and mentioned the term emotional intelligence, Joyce mimed a gagging reflex. The researcher asked her to explain: “I mimed gagging because those are all those psychological constructs that [Robert] loves. He knows I say that. He doesn’t get it when I say social justice” [JK TL: 242-243].

Both Robert and Joyce identified a few programmatic elements that indicate a focus on building interpersonal skills. The department hosts a mix-and-mingle where all students in the program are invited to get together at a local restaurant in order to build rapport and to facilitate stronger interpersonal connections. Robert also mentioned past holiday parties that had taken place in the department which served similar purposes.

Interestingly, Joyce described in great detail a specific example where her own sense of interpersonal skill helped a student through a difficult time. Briefly, there was a
young student in class with body language that indicated extreme duress. Joyce explained,

I walked up to him, because it could’ve blown up. It could have absolutely blown up. I don’t know what moved me to do it and I reflected on it after, “What the hell was I thinking?” But it was in the course of this conversation that were having about these things and I asked him, “How are you doing? How do you feel here?” And he opened up. He not only opened up, but he got highly upset. He went out. He asked to be excused. He went out. I let him go for a while and then I went out and talked to him and he was in tears. Some of the things that I kind of picked up on is I knew he was a gay man, but I didn’t know all the particulars of that. He was young. And he had come with a woman who had been in class with him from the beginning, but she dropped out after the first class. So he started to talk to me. [JK TL: 256-264]

Joyce continued, “Sometimes you got to go with your gut and you got to reach out to a student” [JK TL: 270]. If she did not have a strong relationship with her students, she would not have been able to sense the distress:

We had a good conversation. He opened up and he talked about some of his difficulties and some of these students came forward during class because some of them are advising in student affairs and what not and to offer services and help him because he felt very isolated. He had recently come out, though. . . . His father doesn’t know, and his father is actually I think from Nigeria. . . . He’s felt isolated and alone. And so we rectified a lot of that stuff, but it’s, you know—how do you listen as a teacher? How do you teach that? . . . Are you really hearing what somebody else is saying or are you really looking at the person and seeing a person in trouble or not? [JK TL: 276-285]

Joyce said interpersonal issues may arise out of classroom discussions, often in the context of understanding and respecting differences between people. She said, “So if I can get them to stop and think about these things before they move on, then I’m good. And every now and then, I do hit the jackpot. You just never know” [JK TL: 291-292]. Robert concluded his discussion of this competency: “If you don’t have interpersonal stuff, you’re doomed. You’re not going to go anywhere with your career. . . . That’s really what it comes down to” [RW TL: 221-222].
The next competency discussed in the interviews was teaming skills. Both Robert and Joyce claimed to use a lot of group work and team work in their courses. And according to Joyce, they are almost always multicultural just because of the nature of the student population. Joyce also said that as a result of this multicultural experience, as well as the extensive use of group work, the students are very accommodating to each other. Specific best practices mentioned by both of the professors include teaching sessions (in teams), presentations (in teams), projects (in teams), and papers (in teams); although doing a paper together with another student is almost always an option, according to Joyce. Additionally, Joyce detailed her use of peer review groups for her doctoral students: “I have all my students meet together as a group of the whole once a month, and then I put them into teams or peer groups. I expect them to review each other’s dissertations, other writing projects” [JK TL: 309-311]. The groups she puts together are as diverse as possible based on the student population present at the time. She concluded, “So we use team building and they’re always cross-cultural. You can’t get around that” [JK TL: 320].

The final competency discussed within the broad category of managing people and relationships was empowering others. Both Robert and Joyce spoke of using writing as a way of empowering their students. Robert focused on the selection of topics for dissertations, with constructs such as empowerment and mentoring often used within the research agendas selected by the adult education students. However, Robert considers the idea of empowerment as a “slippery slope” [RW TL: 249]. He explained,

It’s a slippery slope because it’s outrageous to think—especially when you get into the transformative learning role, if you’re trying to get people to think
transformatively—you don’t know where that’s going. Do you know what I mean? That kind of learning, some people could be highly offended by that. It's like, “Who are you to tell me about transformative learning?” and all of that. [RW TL: 249-253]

Joyce was more positive regarding this construct. She described in detail the way she uses writing as a way of empowering her students:

One thing that empowers them, if I have a paper in class, I designed the paper requirements to meet the South Florida Education Research Conference paper guidelines. I don't require that they submit it. I do require they follow those formatting guidelines so that after I give them feedback, they can take that feedback, incorporate it into the paper, and decide to submit it or not. Up to them. [JK TL: 326-330]

She said first she “scares the crap out of them because I teach them how to write” [JK TL: 330]. Following a step-by-step process, she goes through every aspect of the paper:

Some of them have a heads up that I’m going to do it. I mean, I tell them I’m going to do it. It’s on the syllabus, but the emotionality involved in even critiquing your own writing, let alone having someone else critique it, let alone having a critique part of the class. [JK TL: 333-335]

She said while the process at first glance seems to deflate their self-efficacy, once they realize that they have a paper that is worthy of publication, their sense of empowerment is fulfilled:

When they get to the end, and actually I’ve given them feedback and I’m saying to them, “I think you submit this.” The fact that I say that is empowering. A faculty member thinks that my paper is good enough to be submitted. Then when they go and they submit the paper and they carry through and they go to the presentation and they do all of that and they get the feedback. That is an empowering experience. [JK TL: 347-351]

One of the results of this focus on writing for publication is an ever-expanding curriculum vitae (CV): “When one of my doc [sic] students realizes that his or her CV is now 10 or 15 pages long, that is an empowering set of circumstances for them, because
I require a publication a year” [JK TL: 361-362]. Finally, Joyce discussed how conversations within her classroom also lead to a sense of empowerment, especially with regards to the teaching and learning process: “We have this space for talking about good teaching and good teachers and bad teachers and bad teaching” [JK TL: 368-369]. She will talk with her students after a student teaching session and offer constructive criticism regarding the use of delivery techniques, testing procedures, value of learning material, quantity of assignments, and other design issues: “Just being able to step back and think about these things and how we make decisions about how we teach and how people learn, I think gives them a sense of empowerment” [JK TL: 377-378].

Business and organizational acumen. The first competency associated with the category business and organizational acumen was vision and strategic thinking. As a result of the high focus placed on the human resources component of adult education at the institution, these competencies generated a lot of discussion from both professors.

Before speaking about specific courses which address this competency, Joyce said, Those are things that I talk about with my doc [sic] students all the time. I meet with them monthly and we have a three-hour meeting. We meet three times in the fall, three times in the spring. . . . The last meeting we talked about research agendas in the summer. The meeting before that was the documents they have to fill out, which goes to what you’re talking about, the visioning and the strategic planning. That’s just something I do that's an add on. [JK TL: 388-393]

Both Robert and Joyce discussed the courses that are taught in the program which address this particular competencies in various ways. Joyce spoke about the four-course sequence in the program for her doctoral students, which demonstrates a progression of knowledge and skills that are clear indicators of strategic planning towards a publishing agenda:
One class is to cover the doctoral process. Another class is to cover the dissertation or collective papers. We have a Writing for Publication class, and a Trends and Issues. All are very definitely writing [focused], and all of them to cover strategic thinking about a writing to publishing agenda. [JK TL: 404-407]

Additionally, Joyce discussed some specific curricular elements in the Organizational and Community Processes course. She said that although that course originally had more of an adult education focus “because most of the organizations created are dealing with some social justice issue” [JK TL: 396-397], the course today has more human resource and entrepreneurial elements incorporated into the syllabus. Speaking of the ways in which teams of students are required to come up with the problem to be solved, Joyce said, “vision and strategic thinking are taught in that class as actual skills” [JK TL: 401]. Although he had never taught that course, Robert also mentioned the Organizational and Community Processes course in his interview:

Basically, it’s all about this because she makes them, gently, put together a business plan, like the way you would hand it out to Banker X. You have to have a vision, a plan, and all the things that go with it, so you can get a grant. [RW TL: 303-305]

Joyce also spoke of the Internship in Adult Education or Human Resource Development course in terms of somebody’s individual vision and mission:

I have them come up with a work philosophy. I talked about the portfolio. I have them do a career path plan, which is certainly a visioning and strategic thinking document for them. They do a strength finder’s inventory, then they have to put these things together. [JK TL: 410-413]

She said the Internship class is more focused on individual career strategies whereas the Organizational Learning course taught by Robert is more focused on the organization, “but we incorporate those skills into two classes” [JK TL: 414].

The course taught by Robert is Organizational Learning and Human Resource Development. This course, he said, is focused on issues that fall under this category:
“One of the things we talk about is leadership and all the different theoretical lenses. . . . During our discussions in that course, we do get at the vision, strategic planning, and how important it is” [RW TL: 296-299]. As a result of this interview, Robert expressed interest in learning more about the specifics of what Joyce teaches in the Organizational and Community Processes course: “I’d be curious to see how she gets it at that one. I would be, really. I’ve worked here eight years” [RW TL: 307-308].

The next competency addressed in this category is leading change. Robert jokingly acknowledged that the change in the students seen between entry into the program and successful completion of the program should be “in a positive sense, instead of becoming basket cases” [RW TL: 312]. In a more serious tone, he added:

It’s all about change. You come in as this bright-eyed, bushy-tailed, highly intelligent person. Then you get beaten, unmercifully, until you feel like your brain is mush, by giving all these readings, papers they’re writing and all these horrible things that we do for your own personal development, of course, and nicely. The whole development is change. That’s what it’s all about. That’s what we do in human resource development, is you are changing, and you are leading change in an intellectual—some of it’s an emotional kind of change. It’s emotional, social development. [RW TL: 315-321]

Discussing the idea of assessing the change in her students, Joyce said, “The only way to do that is develop a personal relationship with them” [JK TL: 418]. She discussed the responsibility for building relationships between students and faculty in the Teaching Methods course:

I can’t force you to come to the mix and mingle that we have. I can’t force you to do those events that we sponsor, but if you come to those, then you can sit down and you talk to me or you talk to others, then we are starting to develop a personal relationship and then we can assess change. [JK TL: 420-432]
Joyce spoke of being able to see a “perspective transformation” [JK TL: 429] take place in her master’s students as she permeates all of her classes throughout the program with issues surrounding the doctoral process:

I talk about doctoral studies. I talk about these things throughout. They’re not pigeon-holed. You can see the light bulbs going off. You can actually see changes in attitudes about what I’m capable of as I talk about this and talk about how the different people might approach doctoral studies. // They can see it. . . . You know they’ve changed because they’ve changed not only their goals, but their way of thinking about themselves. [JK TL: 430-438]

In addition to talking about the issue of change in the Organizational Learning course, Robert also added to the conversation of this competency by referencing a course called Consulting as an Adult Education/HRD Process: “Consultants are called upon to lead change as consultants, or at least understand change or help implement change—help, help. We definitely get into that in our program” [RW TL: 329-331]. He ended the discussion of the competency leading change with this statement: “To be honest with you, I wouldn’t mind having a leadership-type course in our program. That would be very cool, and that [leading change] would be a big part of it. That would be a very useful course. It really would” [RW TL: 333-335].

The next competency discussed was business savvy. Because of the specific focus on human resource development in the adult education graduate at this institution, more so than most of the other institutions interviewed for this study, indications of the teaching of business savvy was prevalent in many of the curricular and co-curricular areas of the program. Professor expertise in the area of business and human resources was noted in the analysis, with both Robert and Joyce admitting to being experts in the fields. Robert said,
First of all, both my colleague and I have a strong business background. We both have master’s in business. We both ran businesses for many years before we got into this role, so we draw upon that heavily. . . . We have a strong sense of business and how important the learning and that the human resources part of conducting business is. We want our students to speak the language of business. That’s why we have separate courses in that. We try to develop all these business competencies. [RW TL: 340-345]

Both professors emphasized the need for adult education programs to incorporate business savvy into the program. Joyce said, “Because adult education, you know even though it’s usually non-profit, is still a business. You got to stay afloat” [JK TL: 441-442]. Likewise, Robert added, 

If you’re a pure adult ed person, you still need to understand business and have that savvy because the savvy is what keeps your center open. The savvy ones are the ones that go out there and get the grants. They’re the ones that can go out there and get the resources that keep the center open. . . . I work with a lot of adult ed centers and they’re fantastic at getting resources. That’s what it’s all about. They have that business acumen, if you will. They do a big part of the job. [RW TL: 349-355]

Robert said much of the language of business is taught in the selection of readings for the variety of courses: “That’s a big deal to us, is that you can speak the language of business” [RW TL: 347]. That’s why everyone has to take three courses of business in the program. Joyce mentioned the courses Organizational and Community Processes, Management of Adult Education/HRD Programs, and Management and HRD classes that all address issues of business savvy. Joyce said the specific competencies associated with business savvy are addressed in the program both intentionally in the curriculum as well as through topics of conversation done more informally. She said, 

I’ll talk about sales and marketing. I talk about that in different classes as it pertains . . . because as adult educators, you may not have to sell like a car salesman, but you have to sell your program. You have to sell your class. You have to get new students. And you have to be able to address the needs of the
class, the needs of the students to the higher-ups. You’ve got to have those skills. [JK TL: 451-454]

Organizational savvy followed in this part of the conversation. The two professors had very different opinions about this competency. Joyce put it this way: “Does he [Robert] talk about that in his classes? ‘Cause I don’t. We don’t have a leadership class and I hate leadership, like I dislike white supremists” [JK TL: 458-459]. Joyce said she would talk about organizational savvy in terms of gay rights, social justice, critical race theory, access for blacks, straight privilege, and straight moralizing. She said, “I would bring those things in all the time. We talk about organizations in terms of those issues, and learning to navigate those barriers” [JK TL: 465-466].

Robert on the other hand considered the idea of organizational savvy from the theoretical lens of socialization theory. He explained,

In other words, newcomers, in particular, they get into a new organization: They have a new job. You start your brand new job in academia, once you get this thing [dissertation], this albatross out from your neck. How do you know how to fit in? What do you do? There is no textbook on it or something. There’s nothing like that. You have to figure it out for yourself. You have to be proactive because it’s not coming to you. You have to go get it, that information. You have to establish relationships with your peers. You have to work with your supervisor. They’re the ones that really know what it takes to get ahead, what’s really valued in the organization, that kind of stuff. These are all these socialization processes that are going on. You get part of the learning network, if you will, in the organization. That’s, to me, like the foundation of the organizational savvy. You know how to survive there. Not only survive, but excel. How do you know how to do it? You’ve been that proactive information-seeker. You have your finger on the pulse of everything that’s going on around you. Not only where you are, but also in your field. You draw upon that to make your life easier at work. That’s what I’m talking about. [RW TL: 366-379]

With regards to curricular references to these ideas, he referred to the Organizational Learning and HRD course. He said he talks about socialization-related learning a lot in that class: “It’s . . . knowing how to manage, juggle all the balls, to keep
your supervisor happy without looking like a rat to your peers, but also be learning how
to work the vendors that you work with” [RW TL: 384-386].

The final competency discussed was managing communities. Joyce began by
referencing the Internship course again: “It has an assignment that they go and attend
professional organizations association meetings and network there. There’s an actual
assignment for that” [JK TL: 471-472]. She added that within the program, there is also
the mix-and-mingle as well as other activities where the students have an opportunity to
form stronger communities with each other. Joyce said,

Sometimes I teach students about treating other students as students, and when
they do that, you’re a lesser being because you’re a student, which is bullshit.
And I point out to them that anybody in this room could end up being in a position
to hire you or fire you because that’s the nature of our student body. You need to
think of each other as colleagues and professionals. [JK TL: 473-477]

Robert admitted that Joyce does a much better job at learning communities than
he does. However, he did provide a few concrete examples that he facilitates: “We
have them working together on projects, having them put stuff together for conferences,
writing papers, doing presentations” [RW TL: 395-396]. He also said he and Joyce both
strongly encourage their students to submit papers to the South Florida Education
Research Conference, as well as other national conferences such as the American
Educational Research Association (AERA) or American Human Resource Development
(AHRD): “Usually, they’re working together, as groups, doing their papers and getting it
[submitted]” [RW TL: 399-400]. He also mentioned again the mix-and-mingle, as well
as working together as a community with other scholars on chapters and book reviews.
He concluded, “You learn by doing. I could sit here and talk about papers until I fall
over. Until you’ve actually experienced it, it’s hard to get a sense of it” [RW TL: 412-413].

While Joyce’s interview ended at this point, Robert continued with the two final questions on the interview protocol. When asked if there were any missing competencies that had not been discussed, his response was “not really. We could talk about all kinds of stuff. We could get into talking about expats and how that’s a great leadership development kind of thing” [RW TL: 423-424]. Robert said living overseas was “the best, most fantastic way to get a global perspective, is to get your butt out there. . . That’s how you do it. I love this stuff. I’ve always wanted to work with expats. I think they’re fascinating” [RW TL: 424-425].

The final question asked Robert to describe what the ideal scenario looked like if the adult education department had all the resources available at its disposal. He said, “I would like to see more of an explicit acknowledgement of the international part of adult education and HRD. That would be in the form of a class. I proposed this before. It’s been shot down, but I would like to make it where we even have a part where a student could opt to go to another country” [RW TL: 432-435]. Ideally, this would be an actual travel experience for the student, but he suggested that this could even be done through some kind of online partnership: “I proposed it before, and they looked at me like I was speaking Greek or something. I think it’s a fantastic way to learn” [RW TL: 440-441]. He described a teaching trip he had taken to Prague, Czech Republic as part of a joint program between the two schools. “I thought that was pretty darned cool. I mean, that would be something cool . . . just having students interacting with students
from that program in another country, I think would be quite enriching” [RW TL:445-447].

**Case 3: Approaching-goals University (AGU).** One quote that provided insight into this case was:

Seriously, if you are going to be successful, you've got to have character, you've got to value people, and you've got to be able to think and vision strategically. You've got to know where you're going to go in order to get there. Your people are going to get you there and your character is going to reflect on the success of your program. They are undeniably joined. [GH TL: 325-328]

**Overview of Case 3.** AGU is a rural public land-grant, sea-grant, and space-grant university located in the Deep South in the United States. AGU serves over 20,000 undergraduate students with a total of over 27,000 students and over 1,200 faculty members. Students at AGU can choose from more than 140 degree options in 13 schools and colleges at the undergraduate, graduate and professional levels. AGU has developed into one of the largest universities in the Deep South, remaining in the educational forefront with its traditional blend of arts and applied science.

According to the Annual Survey of Colleges in 2015, the student diversity profile of AGU indicates that 85.9% of the student population at the main campus is White, 7.1% African American, 2.5% Hispanic/Latino, 2.3% Asian, 1.4% unknown, and less than 1% American Indian or Alaskan Native. Additionally 1.5% of the students are designated as international students hailing from 48 countries.

According to the institution’s 2013-2018 Strategic Plan, AGSU has obtained national and international distinction in the areas of instruction, research, and community engagement. A central tenant of the vision of the institution is a commitment of service to all stakeholders as the state becomes a part of a global society with all of
the challenges and opportunities that brings. AGSU’s mission includes serving the citizens of the state through instructional, research, and outreach programs and preparing the citizens of the state to respond successfully to the challenges of a global economy, drawing heavily upon the new instructional and outreach technologies available in the emerging information age. In carrying out its research mission, AGSU’s Strategic Plan states it will focus available resources in those areas of research and doctoral study that have the potential to develop into nationally and internationally recognized centers of excellence. AGSU aims to provide students with an unparalleled academic experience with distinguished nationally and internationally-recognized faculty who are leaders in their field of study.

**Participants for Case 3.** The two participants interviewed for this case study include the program coordinator and a faculty member in the adult education program, which is housed in the Department of Educational Foundations, Leadership, and Technology in the College of Education. The adult education program offers an undergraduate program of study in adult education, Master of Education (M.Ed.) or Master of Science (M.S.) in adult education, Master of Science (M.S.) in agricultural leadership, Educational Specialist (Ed.S.) in adult education, Ph.D. in adult education, as well as graduate certificates in Adult Education and English Language Training and Extension Educator.

The first interviewee was Dr. Gregory Hyder [pseudonym]. Gregory’s academic areas of interest include training program development and evaluation, individual learning styles, and how learning is assessed. His background includes time spent in industrial training where he has developed and presented numerous programs of
instruction ranging from Sexual Harassment, Loss Control Management, Supervisor’s Safety Development, Methods and Techniques of Training for Safety Instructors, and Office of Safety and Health Administration (OSHA) compliance training. He is an avid world traveler, having lived and worked in places such as Pakistan, Central and South America, Europe, and Japan. His multi-cultural, multi-lingual background brings a unique perspective to examining how people acquire information and develop their own learning style.

The second interviewee is Dr. Rachel Miller [pseudonym]. She is a recently hired clinical assistant professor. She was the Distance Learning Coordinator for the College of Agriculture at AGU and has taught online courses for over 20 years, with combined professional experience in elearning, higher education, training, teaching, technical communication, course instructional design and development, educational technologies, program development and evaluation, healthcare, and strategic planning. She received her Ph.D. from an accredited university in the western United States in Adult Education and Technical Communication, and has a MBA from a major southwestern university in the United States. She has extensive experience in quality management, strategic planning, and internal consulting.

The interviews took place on a Monday morning in June 2015 in the private offices of each interviewee. Each interview lasted approximately 90 minutes. After reading the opening statement of the interview protocol and obtaining IRB consent from each professor, the interviews began. See Table 10 for an overview of the demographic information for the participants of Case 3.
Table 10

_Demographics for Case 3 Participants_

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Gregory Hyder</td>
<td>Male</td>
<td>Ph.D.</td>
<td>16</td>
<td>Adult Education Program Coordinator</td>
</tr>
<tr>
<td>Dr. Rachel Miller</td>
<td>Female</td>
<td>Ph.D.</td>
<td>3</td>
<td>Clinical Assistant Professor</td>
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</tbody>
</table>

_Synopsis of the opening interview questions._ The opening question asked each professor to recall a positive experience in their respective positions as a faculty member in the adult education department. Gregory began his interview discussing a pair of lasting contributions he had made at AGU. When he first arrived at the institution, there was no Ph.D. program for adult education. And although he emphasized his support for Ed.D. programs in general and their place in the academic landscape, he questioned why the Ed.D. at AGU exceeded the requirements for a Ph.D. in the other conference schools. The resulting decision by AGU’s board of trustees to grant the Ph.D. in adult education was one of the most successful efforts undertaken by Gregory. In addition to this accomplishment, Gregory was successfully able to lobby the state legislature to lower the age of consent for research purposes from 19 to 18. He said, “If I were to survey the freshman class of this university, I would lose the majority of those people in the class. Therefore, I’m going to end up with flawed data. The original bill was drafted at this desk you’re looking at” [GH TL: 11-13]. Gregory
described the four-year long legislative process, the astounding rejections which had to be overcome from state senators, and the pride of experiencing the day the governor signed the new law into place. Providing an insight into his personal philosophy and recognizing that these two accomplishments are not directly related to the field of adult education in a traditional sense, Gregory said,

The field of adult education is larger than the study of adult education. If you’re not willing to take on these kinds of projects and goals to better the entire field, then you’re not really performing the functions that you should be. [GH TL: 24-26]

Gregory then described the general sense of entrepreneurialism evident in successful programs, which he absolutely considers his program to be. He described the increase in graduates from when he first started working there to a current enrollment of over 170 students. Additionally, the faculty has grown from a faculty of one to the current level which includes two full time professors, one tenure-track assistant professor, and a recently hired clinical professor as well as a full time departmental student service coordinator. The program offerings have also increased, including a master’s degree with a concentration in cooperative extension, tremendous growth emerging from cooperation with the state cooperative extension system, and a current proposal for a master’s degree in adult education with a certification in English as a second language (ESL). The ESL connection rose out of personal and professional connections with the President of Ecuador who proclaimed a desire for his citizens to be bilingual: “There are 2,700 teachers of English as a second language who have basically no training whatsoever. Enter the adult education program from AGU.” [GH TL:41-43]
In Rachel’s response to the opening question, she claimed although there were so many to choose from, she focused on her relationship with her colleagues at AGU, particularly the director of the program and his wife, who is also a professor in the program:

They are an amazing team, whether they were married or not, and I think that they both have some strengths that sort of balance each other out. They are very supportive in terms of understanding the student population, supporting your need for information, sharing information for courses, anything institutional, work-wise, even personal. [RM TL: 4-6]

The conversation shifted to the perceptions each professor held towards the future of the field of adult education, and here, Gregory began with a bit less enthusiasm: “It depresses me to watch programs fold. And programs have been folding for about the last ten years or so. They simply fold because they are unwilling or unable to adapt” [GH TL: 47-49]. Offering critical reflections on the lack of success from colleagues in the field of adult education, Gregory went on to say, “We have been so filled with the self and inward looking at our own righteousness that we fail to look at our role within a culture or within the society of which we’re a part” [GH TL: 49-51]. As an example of choosing to shift away from seemingly rigid departmental performance measures, Gregory described how he waives the overrated data point associated with the graduate record exam (GRE) used by most graduate programs in the U.S. He waives GRE requirements for any military service personnel applying to the adult education graduate program, explaining that the traits desired in an academic student have already been demonstrated by this population: “I'm not going to cloud them with some standardized test” [GH TL: 61-62]. Emphasizing the need to think more broadly regarding the future of adult education graduate programs, Gregory said, “You want
your program to die on a vine? Continue doing business the way you have been” [GH TL: 57-58]. A successful program needs to “go out on a limb. If you’re doing something to benefit yourself, you’re wrong. If you’re doing it to benefit your program, it’s amazing how much forgiveness you can garner” [GH TL: 62-64].

Gregory continued, “The field has got to change. I think there is a very, very vocal part in adult education that deals with radical education” [GH TL: 65-66]. Acknowledging and supporting the efforts of leaders in the field such as Paolo Freire, Myles Horton, and others, Gregory nevertheless added, “To assume that the field is only that is a miscarriage” [GH TL: 67]. Programs need to look at more practical applications of adult education: “A continual focus on training and industry, program assessment and evaluation, statistical and qualitative skills” [GH TL: 68-69]. He emphasized the need to recognize the value of mixed methods research techniques as opposed to a single strand of methodology: “If you’ve just amputated one leg, you can hop, you cannot run” [GH TL: 74].

Rachel’s response to this second question still held much of her positive enthusiasm from the first question. In addition to the positive relationship with her adult education colleagues, Rachel also felt a sense of excitement for the field of adult education, especially with regards to the program at AGU. Her expertise led to being hired as a clinical professor and is a direct reflection of the growth of online curriculum offerings by the program. Additionally, the development of new masters programs, particularly the Masters in Agricultural Leadership Program in conjunction with the career and technical education department and the College of Agriculture, as well as the proposals for new connections with English as a Second Language (ESL) and other
program expansion opportunities on the horizon are all exciting aspects of the adult education program at the institution. Moving beyond the program elements, Rachel was also excited about the way the field of adult education is incorporating technology into its learning mechanisms. She stated,

In terms of adult education, I think it’s a really good fit with a lot of different types of industries in terms of providing not only people who can help train in those industries, and train the right way. / / So, because we’re becoming such a knowledge society, I just feel that . . . technology is a part of it. The technology is a tool and so we still need good educators. [RM TL: 21-24]

The third question regarding the Standards for Graduate Programs in Adult Education was not addressed directly by Gregory, and Rachel only briefly mentioned that she had heard of them, and that as a member of AAACE she had seen that they were distributed. Only brief discussions had been held about them in the adult education department as far as she knew, and she was interested in learning in more depth what they actually entail.

The interviews shifted to the fourth question, and a discussion of Gregory’s extensive international experience in adult education. In addition to teaching opportunities in Egypt during the time of the Arab Spring, he had also taught in locales such as Saudi Arabia, Tunisia, and Argentina. He discussed how interested programs in the Middle East in learning the differences between the North American and European doctoral dissertation processes. He described the European process as hurtful, emotionally and physically, as well as “horribly grueling” [GH TL: 84]. In contrast, the completion of a doctoral dissertation in the North American tradition is a celebration, having already passed through “sufficient grilling and hurdles and refinements” [GH TL: 8687] along the way so that a doctoral candidate who has recently
defended his or her dissertation immediately becomes a colleague at the time of graduation: “In Europe, it seems to be it’s your last opportunity to stick a knife into students. It’s horrifically difficult” [GH TL: 92-93]. Gregory’s point in this part of the discussion was that the process witnessed abroad had nothing to do with the student, it was only about the professors trying to “illustrate their own brilliance” [GH TL: 95].

Rachel said she had felt a kindred spirit to this researcher during the introductions. Although she did not have a military background herself, she had been a military spouse and was able to relate to the international and personal experiences that living in other countries provide. Rachel added, “I do think that our experiences—obviously as Malcolm Knowles said—make us learners and adult educators or whatever. So I think I could feel that from you that our work experience has led us to this profession” [RM TL: 31-33]. Living overseas, she explained, was one of the best experiences of her life. Though she had lived in a large city in the Midwest and loved it, she got out of the area for a reason. Her concerns regarding having to live overseas were quickly dispelled and she said that she cannot imagine her live without having that international aspect associated with her today. She added, “I wish everyone could do it” [GH TL: 37].

Rachel also recognized the value in study abroad opportunities for the undergraduates, but emphasized that opportunities such as those needed to be appropriately designed, rather than just serve as a vacation experience. The idea of international experiences in adult education can also be reflected in the career opportunities that exist in terms of globalization. Rachel explained, “I mean, we have to work with people across timeframes and time zones and different continents. We are in
a global society” [RM TL: 40-42]. Describing a conversation which took place in a recent class, Rachel explained how she told her students how fortunate they all were because of the international students from Kenya and China sitting right there in the classroom.

We were able to tap into their experiences here in the classroom. I can say I went to China twice and I went to the Great wall and I’m in contact with this person, but how much better is it that we have [Lisa] here who can tell us what her life has been like and where she’s going to work when she gets back and where she’s worked before and things like that. [RM TL: 44-48]

Regarding the topic of global leadership, Gregory described the construct as a term in search of a strong definition. This indecisiveness in the general population is a clear reason why it is so difficult to discuss. Gregory’s discussion about compartmentalization of the construct related directly to the literature review of this study. Offering examples such as economic leadership, political leadership, military leadership, and social leadership as ways in which the term global leadership could be understood, depending on the context of the discussion, he discussed the different ways in which specific leaders are identified in the national psyche or national consciousness. Ghandi, for example, could be considered a social leader, whereas Nehru would be a political leader. And the lack of identity and sense of moral bankruptcy associated with the leadership of ISIS or Al-Qaeda make it very difficult to discuss these world issues within the greater context of global leadership. Morality defines global leadership for Gregory. And questions such as where is morality taught, how it is acquired, and how philosophical shifts occur in religious or political arenas are not only important discussions which should take place, but they are conversations that should take place in the field of adult education programs. According to Gregory, “The
study of religion is one of the earliest forms of adult education” [GH TL: 120], yet in
order to facilitate the kinds of discussions that help bring these global issues to light
require instructors and educational leaders “who are free of their own bias [and] who are
knowledgeable of their subject matter” [GH TL: 121-122]. Gregory described the
increased competency of a female student from Saudi Arabia in the adult education
program, and an example of co-teaching that took place regarding the Islamic tradition.
The material was well-received not only because of the direct experience of the
international student, but also because of the high level of proficiency in the subject
matter demonstrated by Gregory: “It’s incumbent upon us to know stuff without being
the stuff. But to make that bridge in the student’s mind is very, very difficult. So this is
what we encounter in adult education” [GH TL: 130-131].

Rachel’s first thought regarding the term global leadership was to refer back to
her business background, and when asked to describe the term in her own words, she
said, “I think of a leader in industry and a company that’s probably very much a global
company, whether it’s Hyndai or Ikea. . .” [RM TL: 50-51]. However, moving out of the
connection between adult education and workforce education, the idea of global
leadership becomes less clear. Rhetorically, she asked, “Is it somebody like Nelson
Mandela who was a global leader and had a certain philosophy about life and
leadership? Or is it an artist who is able to play his or her instrument and reach different
types of people?” [RM TL: 54-55]. Rachel’s long pause seemed to reflect the inability to
identify a clear definition for the term for many of the interviewees in this research study
[Researcher’s reflective journal, May 2014].
Synopsis of the global leadership competencies. The material presented in the following three sections represent the three categories of Bird’s (2013) nested framework of global leadership competencies: (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen. Because each professor discussed the competencies in the order in which he or she rank ordered them, the data from Gregory will first be presented with regards to the category managing self, followed by the discussion of the competencies of this category by Rachel. The same process will be repeated for each of the other two categories of Bird’s framework. A final section of the closing questions will follow the presentation of data of the key questions regarding the global leadership competencies under inquiry.

Managing self. Gregory began this section of the interview regarding Bird’s (2013) competencies with a general set of comments from a programmatic perspective. He discussed the way in which the program is designed, including an open entrance-open exit setup with the foundations courses preceding courses that progressively demonstrate greater levels of responsibility and teaching methods. The early classes in the program are primarily instructor-centered, reflecting the andragogical model that exists in most training scenarios prior to graduate school. With the vast majority of undergraduate college work demonstrating instructor-centered methods, this helps to acclimatize the adult education graduate students to the greater variety of teaching methods that follow. This expansion of teaching methods includes a later course in concepts, programs, and resources that require a pair of students to teach a two-hour block, including all aspects of the planning and delivery means. While this often leads
to students complaining about never having done this before, Gregory revels in informing them that they expect him to do this every evening!

Finally, Gregory emphasizes that a large part of the adult education program is providing the students with a safe place to make mistakes, and telling his students:

If you make a mistake in the classroom, we can correct it. This is where you make errors. You come to college to make mistakes. We can fix them. You go to the workplace and make mistakes, you get fired. So let us put forth an honest effort and then we'll correct whatever needs to be corrected. [GH TL: 157-160]

This transition inherent in the program design is a way for the graduate students to experience what adult education philosophy is by being immersed within that philosophy: “It’s a managing-self kind of thing” [GH TL: 162].

Gregory selected the following rank order regarding the five competencies associated with the category managing self: (1) character, (2) inquisitiveness, (3) global mindset, (4) flexibility, and (5) resilience. Speaking briefly about character, Gregory said, “I think if you have character flaw, if you are missed, you have no business in the teaching-learning business. Go find something else” [GH TL: 167-168]. Wonder and curiosity are requirements as well, leading to his choice of inquisitiveness as next on the list. Additionally, Gregory emphasized the need for multiple research strands, heightening the competency of inquisitiveness.

Regarding global mindset, he reiterated the need for students to look beyond their own borders. Discussing the notoriously strong family ties based on historically agrarian economies of the area, Gregory told a story about a student who refused a fantastic job in a large city two hours away because she was holding out for something closer to home: “That’s a social condition, it’s inherent in educating in [this state]” [GH TL: 180-181]. Efforts to increase global mindset within the program include more
opportunities for travel abroad: “That’s where global mindset begins. It begins by crossing the border somewhere” [GH TL: 184-185].

Change, said Gregory, is constant. Funding, program requirements, students themselves are constantly changing. Therefore, flexibility is necessary to successfully adapt to this growing reality. Finally, resilience is a competency that can be reinforced, though students should ideally already come into the program bearing this. Evidence of this can be seen in the vetting process for incoming students. Gregory explained he wants to learn about the ways in which students were able to overcome obstacles that had occurred before entering the program: “How did the students adjust? Grow? Make good?” [GH TL: 194-195].

Rachel provided the following rank order with regards to the first set of global leadership competencies: (1) flexibility, (2) global mindset, (3) inquisitiveness, (4) resilience, (5) character. Character was placed at the end of the list not because of its unimportance, but because “it’s the one I can affect the least” [GH TL: 62].

Rachel stated that flexibility was simply a necessity in today’s society. However, because people are very afraid to change and always will be, learning how to be flexible is a tremendous step towards success:

I think if you are flexible, all this other stuff falls into place . . . maybe except for character. You’re going to understand that you need to be tolerant of other people, that you need to understand other people, you’re going to have to think outside the box, you’re going to have to take care of yourself . . . then character is just how you grow up. [GH TL: 67-69]

A specific example of flexibility occurred on the first night of class this semester. Rachel had to switch classrooms, and she saw the frustration in her student’s faces. She told them right away that this is adult education and you need to be flexible. She
discussed this competency with the students as well as with her colleagues in the adult
education department, and Rachel said that over the years she has become much more
flexible in terms of due dates and adapting topics and choosing topics for conversation.
Rachel came to the conclusion that while flexibility may not be a specifically taught
competency, it is certainly one that is applied within the program and evident for the
students.

Global mindset is a competency in which the program is definitely trying to
increase. “We are definitely trying. We talk about global society in the two main
classes. I talk about it in terms of workforce education and then special populations and
things like that” [RM TL: 78-80]. Rachel talked about the international flare within the
classes as a result of the influx of international students into the program, as well as the
support for this aspect of program growth from the administration. Rachel described the
extensive international experience of Gregory’s career as an example of “positiveness”
[RM TL: 83] in the program. Though there is not a specific international adult education
class at the current time, there is a lot of international student experience as a result of
the ESL expansion and study abroad opportunities.

Inquisitiveness, however, is a competency that Rachel was able to say with
utmost confidence taught within the curriculum. The class on learning styles is an
example of how inquisitiveness is incorporated into the curriculum.

I’ve heard that it’s just fantastic. It goes beyond the teaching methods, the
instructional strategies, and I think that brings out the creativity. I’ve heard the
kids laughing and having a great time last semester because they teach one
another and they were using different ways to teach. So much more fun than my
class. [RM TL: 95-98]
Resilience is often discussed in terms of special populations, specifically in terms of health, eating, exercising, and mind and body connections to managing self. Character, however, is a competency which Rachel did not feel comfortable discussing in terms of curriculum. Although she said issues such as the honesty code, plagiarism, and APA formatting are regularly discussed, the competency of character is not really addressed in any real sense in the curriculum. In the researcher’s reflective journal, the researcher noted that both Rachel and Gregory approached the answering of this question from very different perspectives. Whereas Gregory emphasized the importance of character as a fundamental competency required for all other aspects of the adult education graduate school experience, Rachel kept her focus during the interview on being able to provide specific examples of the competencies within the curriculum or co-curricular elements of the program. Both perspectives provided an important insight into the competencies, however the differences in approach led to a complete shift in the rank order for this particular competency.

*Managing people and relationships.* Regarding the category of managing people and relationships, Gregory provided the following rank order: (1) valuing people, (2) interpersonal skills, (3) teaming skills, (4), cross-cultural communication, and (5) empowering others. Considering these five competencies from primarily a programmatic perspective, Gregory said that valuing people was the “primary focus of any educational undertaking” [GH TL: 201-202]. Acknowledging that some students require more assistance than others, nevertheless “if you do not value people, you evolve into being a pompous ass with very little value in that teaching-learning process. You really can’t be effective in this field without valuing people” [GH TL: 204-206].
Valuing people, according to Gregory, is then reflected in the ways in which you communicate with others: “Teaching is a very, very personal undertaking. I like to think of the instructor standing between a body of knowledge and the student. And the instructor’s function is to create that bridge” [GH TL: 207-208]. Gregory described a primary goal of the instructor is to prepare students to transition into their own sense of where they belong within that body of knowledge:

So in a teaching-learning environment, the primary role of the instructor is to prepare the student to receive and present the material so it can be received, until the instructor drops out of the picture. To do that, you need the interpersonal skills. [GH TL: 212-215]

Regarding the competency of teaming skills, Gregory explained how well students of all ages work in conjunction with each other, rather than as independent thinkers. Describing the concept of the teamwork required in successful foxhole deployment in World War II lingo, Gregory emphasized the clarity, accuracy, dependability, and teamwork that developed during such stressful environments.

Transitioning from this battlefield concept of teamwork to jobs and employment, Gregory spoke of how teamwork can contradict work stress, with a development of reliance between people being the key to success. Offering a specific curriculum example, he said,

I don’t have a bit of a problem having two people turn in one paper. They both get the same grade. I don’t care if one person wrote the whole thing. I really don’t. Because if you and I are teamed up and you’re dumb enough to write my paper for me, I’ve got skill, Jack! [GH TL: 227-230]

Although Gregory believes that the acquisition of foreign language is primarily what people think of when discussing cross-cultural communication, he argued that the acquisition is not what is important at all. Rather, it is the understanding of the culture in
which the language is used that should dominate discussions of this competency: “This
tells you about the people, the society, their history. It gives you an understanding” [GH
TL: 233-234]. Grammar lessons are not the point of cross-cultural communication,
context and action within the language are important:

Our doctoral programs are amazingly remiss in foreign languages, because
we’ve had pinhead predecessors who only saw the value of learning the
grammar and the lexicon and the phonology of a language. They failed to see the real value in language acquisition. [GH TL: 240-243]

The final competency Gregory discussed within the category managing people
and relationships was empowering others. He was very clear about his feelings
regarding this concept: “I am so tired of this overused empowerment thing. The horse
has been beaten” [GH TL: 245-246]. Gregory does not view power as something that
can be given. He emphasized the recognition of skills and abilities in his students as a
source of empowerment. Power as a concept is not questionable, however. As the
instructor, power exists from position and expertise. However, even that idea created a
sense of unease: “Now we’re getting into the fuzzy wuzzies. What makes him an
expert? Is he or she recognized as such? That’s where power comes from” [GH TL:
250-252].

Rachel ranked the five competencies associated with the category managing
people and relationships as follows: (1) interpersonal skills, (2) teaming skills, (3) cross-
cultural communication, (4) valuing people, and (5) empowering others. She
emphasized extensive overlap between all five of these competencies, as well as
noticing that these competencies are addressed in nearly all the classes she teaches,
specifically The Disadvantaged Learner and Workforce Education.
She began the discussion of interpersonal skills by describing how in her most recent class, this competency was discussed in terms of interviewing:

One of their assignments is to talk about adult education with someone in the topics that they're learning, and then they have to transcribe these interviews and things like that. We've talked about being able to talk with a person, articulate, summarize . . . some people don't have very good interviewing skills and so that's part of it, being able to listen and just dialogue and maybe a sensitive topic . . . and being able then to respect the other person's opinion. I challenge them to choose somebody that they may feel uncomfortable dialoguing with rather than their spouse. [RM TL: 114-120]

Rachel added,

The number one reason people leave jobs or are fired from their jobs is because they have an interpersonal conflict. It's not because they can't do their job well, it's because they can't get along. These soft skills are very important in today's environment. [RM TL: 122-124]

With regards to cross-cultural communication, Rachel connected the ideas associated with this competency back to global mindset and being able to understand someone else's perspective. She talked about how she incorporates the process of learning to communicate with someone who shares ideas that are different from your own in her classes, whether those ideas are based for example on geography, religion, or social economic status, “being able to understand and have a tolerance for someone else’s different values and just being able to dialogue with them” [RM TL: 129-130].

Describing a recent presentation that illuminated this competency within a curriculum element, she said,

They’ll talk about different populations. Last semester, they highlighted ESL learners and some specific people like some folks from Saudi Arabia and Egypt and females. We talked about how it would be to work with them as a male instructor and how difficult that can be and why and things like that. [RM TL: 131-134]
Another example of cross-cultural communications in her classroom takes place during field trips to a local multi-national car manufacturing plant: “Although it’s very much a Korean company, with American workers but a lot of Korean management” [RM TL: 136-137], the students are able to see how the plant is run with such a cross-cultural mentality and what that looks like in terms of safety, training, and leadership techniques.

The discussion regarding teaming skills led to an acknowledgement of how the students really feel about working in teams, especially in an online environment:

I make my students work in teams no matter what. And they hate it. Yes, they do. In most cases . . . because I said, you never work at a job where you don’t have to work with somebody. I’m sorry but you can’t. You have to be able to work with somebody. You need some interpersonal skills, you need to be able to communicate, you need to be able to work as a team. [RM TL: 139-142]

Different kinds of team skills include presentations, papers, and online discussion boards. Sometimes, they have choices with regards to how they want to present their material, sometimes they can choose their own teams, sometimes they can choose how to present papers; over the years and with the advice of the program coordinator, Rachel said she has become much more flexible with regards to how the students conduct the work. But she holds fast on the idea that during the course of the semester, they have to work with each other and not just complete all work on their own.

Rachel seemed less certain about the ways in which valuing people is directly addressed within the curriculum: “It’s difficult, that’s a difficult one. Maybe you are able to understand that there’s a different culture in cross-cultural communication, but to value those people and their opinions can be very difficult” [RM TL: 159-161]. One suggestion she made regarding the application of this competency is the use of guest
speakers. She talked about having a guest speakers come in to talk with her students about prisoner education, as well as speakers from the mental illness society, NAMI:

I’m not sure if that didn’t influence some of that. I do use guest speakers in there because they can really add a whole new component. I mean I have guest speakers in all of my classes when I have a specific topic. Sometimes it works out well and sometime it doesn’t. Most cases it does and I invite those people back. They can offer so much more than I can sometimes and I can create dialogue around it. [RM TL: 172-176]

Finally, Rachel connected the competency of empowering others back to the ideas of self-management, self-efficacy, and self-regulation. She said,

We are taught that we are intrinsically motivated. So I can say to you, “I want you to take the lead in this assignment.” But do you want to do that? Do you have the skills to do that? I don’t know. [RM TL: 178-180]

She described how teaming skills could possibly help in the idea of empowerment, because in her classes, the students can decide whether or not they want to be the leader in a given online discussion forum or presentation:

Do you want to take a leadership role? You can be anything you want to be. Except, if you don’t want to take it on, there’s nothing I can do. I guess we have to make sure that they feel that they do have the power . . . that you really, truly mean it. And they have to trust you. They really have to trust you. [RM TL: 183-186]

Rachel’s thoughts on empowerment seemed to reflect a disconnect between the power a professor has in the day-to-day activities of the classroom and its curriculum development and the student’s desire to actually grab the power offered and make use of it [Researcher’s reflective journal, May 2015]. Rachel ended the conversation of this category stating that she has no problems with empowering people. Speaking of her power with regards to issuing grades, she said, “You earn your grade is what I say. You can get any grade that you want. Everybody can get an A. I want you all to get an A. Everybody can earn an A” [RM TL: 187-188]. Yet, she emphasized that students have
to be able to manage themselves successfully before any discussion of managing others are attempted. However, if students are able to achieve both categories of competencies discussed thus far, then that one competency with which she had previous conflict in reconciling into the discussion—character—can be represented within the actions and successes of the students.

*Business and organizational acumen.* Gregory’s discussion of the final category of Bird’s (2013) framework, business and organizational acumen, began with the following rank order: (1) vision and strategic thinking, (2) leading change, (3) organizational savvy, (4) business savvy, and (5) managing communities. Gregory began this part of the discussion with the comment that thinking as a competency is reflected by the adult education programs. One specific example from a program perspective is the proposal for a master’s degree with an embedded English as a second language certificate. This is the kind of strategic thinking required to keep adult education programs going. Collaboration with other countries led to this success. Referring to the Ecuadorian president’s proclamation for a bilingual citizenry of bilingual, Gregory stated, “I’ve got the degree and he’s got the finances. We’re together.” [GH TL: 272-273]. Similarly, the master’s degree with concentration in cooperative extension represents a specific example of vision and strategic thinking:

People in cooperative extension have an opportunity to gain teaching skills, because if you’re advising a pig farmer on how to raise pigs, like it or not, you’re in a teaching-learning environment. You’ve got to know who your audience is. You’ve got to know what your products are. And you’ve got to have the skills to make what you know, transferred to someone else. Those are teaching skills. Where do you get that? In an adult education program. [GH TL: 276-280]

Gregory associated the competency of leading change to taking risks: “If the most important thing to you is preserving your employment, then don’t take risks. Don’t
get involved in leadership” [GH TL: 282-284]. He did, however, acknowledge that it is important to know which battles are winnable and which ones are not worth winning. Additionally, there is no problem with bringing change about slowly. “Evolve the change. Don’t take it head on. And then, change will follow” [GH TL: 287-288]. According to Gregory, knowing how to lead is integral to any kind of organizational growth or stability. With many tools in the toolbox, teachers will be able to find a number of alternatives to any situation they face.

Organizational savvy within the adult education department is often a reflection of the experience of the faculty. Gregory spoke of the hope that faculty have studied this and have been involved in the practice of organizational structures. The problem, however, is in a lack of reflection on the part of the faculty. Instead of complaining when some organizational issue or change does not go the way a faculty member expects or wants it to go, faculty should reflect on the reasons why things happened the way they did. Questions such as who promoted it or who influenced it should dominate thoughts at this time. Unfortunately, Gregory sees this as a sign of organizational withdrawal rather than organizational savvy.

Business savvy, on the other hand, generated much more positive conversation. Certain business principles are very important to the success of adult education graduate programs. These include establishment of clear goals, the identification of resources to accomplish the goals, and the implementation of those resources. The danger, however, is the prospect of running the academic program on a business model: “A business model is there to produce profit. Without the profit, the business
goes away” [GH TL: 301-302]. This would be a dangerous direction. Discussing this idea further, Gregory said,

What is the profit in education? Most of the time we can’t even describe to you what our graduates should look like. Well, they’ve got to do research. They’ve got to understand educational foundations. Throw in foreign languages if you’d like. What the hell does that mean? Do they have to be skilled in these things? To what degree are they skilled? How do we figure out when they have the skills? What if they’ve got too much skill already? Why do we have prerequisite courses? What if the student already knows that? How do we manage that? I’ll tell you how we manage that, we make them take it anyway! . . . Your organizations are messed up, your business savvy is messed up if that’s what you want to rely on because you’re nothing more than the bureaucrat of the barnyard. [GH TL: 302-312]

Regarding the final competency under discussion, managing communities, Gregory said, “The phrase managing communities implies that there’s management taking place. . . . I would submit to you that managing is not so much being a manager as it is a collective undertaking, particularly in academia” [GH TL: 313-315]. Management might incorporate the organization, a committee, a department, a program. And Gregory acknowledged the responsibility of the coordinator to have these capabilities, to go to the requisite meetings: “But when the faculty are assembled within this program, it’s almost like Native American Indian leadership. That chief is no chief. It’s a confederacy. The leader only has the power granted by the followers” [GH TL: 317-320]. Managing communities, according to Gregory, is not a top-down perspective: “It’s got to be, we are managing this thing together” [GH TL: 321].

Rachel ranked the five competencies associated with the category business and organizational acumen as follows: (1) business savvy, (2) managing communities, (3) organizational savvy, (4) leading change, and (5) vision and strategic thinking. There
was a long pause as she contemplated the order in which she had just provided the list of competencies, before adding

This one’s the most difficult because you can definitely see that not everyone is going to be able to do all these. They’re just not. I just don’t think that everyone’s set up to be able to think at the larger level. I’m not sure that we teach it. We try, probably, in several different of our programs—in our educational leadership program and our higher education program, where we teach about administration and leadership, and organizational development. But we’re not allowed to teach them the stuff that would cross over to the MBA program. So you’ve got to name it something different or whatever. I don’t think we treat our people that way necessarily. I don’t think we expect them to go out and become great [managers]—I don’t ever—it’s interesting. [RM TL: 199-207]

At this point, Rachel stopped her train of thought and admitted that one of the reasons she was struggling to discuss details regarding these set of competencies is because she has limited experience with doctoral students: “I have not had a lot of Ph.D. students. See, that’s not my role. I work mostly with the master’s program—mid-level manager type of positions” [RM TL: 209-210]. She admitted some of her students could succeed at a team leader or supervisor position, and that she would certainly support their aspirations to achieve higher roles within their organizations, adding “but I don’t know if I even—those type of skills, rather than focusing on vision, mission, and things like that . . . or leading change. / / That’s interesting” [RM TL: 212-216]

Setting aside those thoughts, she began to discuss the five competencies associated with this category, beginning with business savvy. Rachel listed several specific skills that take place with regards to business savvy, including how to speak, how to articulate, how to present, how to conduct research, and how to use technology and share that information with one another. She spoke of receiving a small grant within the adult education department whereby ePortfolios are to be incorporated: “We’ve started it off in the Internship course and now we’re moving it into other courses”
She described the ePortfolio as much more than a website or resume: “It’s being able to showcase yourself using technology and being able to articulate yourself to a broader audience” [RM TL: 229-230].

With regards to the competency managing communities, Rachel spoke of the encouragement offered to students to attend and present at conferences, networking at conferences, as well as getting involved with different communities on campus. She mentioned again the impact that having guest speakers have on the acquisition of these competencies: “I tell them to get involved with those guest speakers if they feel passionately about it. Maybe that will help them in their career” [RM TL: 234-236].

Besides volunteer activities for the students, Rachel said that she believes the adult education department does a good job of managing communities by bringing in, for example, veterans resource center, outreach, the local center for lifelong learning and the older learner, and the cooperative extension. She described a specific curriculum exercise in the Foundations course whereby the students do a Schroeder’s typology survey in a city of their choice: “This semester, we had students say ‘Can I do Scotland? Can I do . . .?’—and I’m just like, perfect! They’re having fun with it. It gets them into a whole other community that they’ve never explored” [RM TL: 242-243].

The conversation regarding the competency of organizational savvy led to a discussion of politics: “We talk about politics a lot in classes. I struggle, all of us are going to struggle with politics no matter what organization we live in. We talk about that” [RM TL: 248-249]. She described conversations regarding the so-called black belt region in the state and what that means for adult education:

Some of us may feel one way, some of us may feel another way, but we need to educate ourselves as to why and understand. Sometimes we can do stuff about
it and sometimes we can’t. We talk about it though. The only way to do something is to be involved. And vote. Vote. [RM TL: 251-254]

Leading change was a difficult competency to articulate for Rachel: “I am concerned. . . . It’s one of my more difficult things in terms of dealing with the adult learner and the Ph.D. program” [RM TL: 259-261]. She said the Ph.D. is more than just a piece of paper. The change that is inherent in a student who attains that degree should be evident: “But I have to manage my expectations. I think that—I don’t know—there’s probably a broad definition of what that change is and how someone would assess it” [RM TL: 261-263]. She spoke of expectations for the student, including the ability to articulate, to present, to be an expert in some topic. She ended with a bit of uncertainty about the success of the program to actually complete this though:

You spent your career doing that, so I do expect that. I’m not sure that always happens. I do worry. Is it the program, or is it my expectations, or is it the person? I don’t know yet. I’m too early in my career, I think, to do that. [RM TL: 264-266]

With regards to vision and strategic thinking, she referred back to her relationship with Gregory: “[He] is just this wide open thinker and he has so much—he has a better perspective. I don’t necessarily agree with him on everything, but he has just so much experience” [RM TL: 267-268]. She spoke of her desire to be able to give to the students the kind of savvy and skills that Gregory is able to give to his students. She admitted she has not reached that level of proficiency yet within her role as a professor in the adult education department to adequately deal with issues of vision and strategic thinking. Not selling herself short, by any means, Rachel was just self-aware enough to be able to recognize that she has a long way to go in this area [Researcher’s reflective journal, May 2015].
When asked if there were any competencies that were missing from the model, Gregory quickly responded with the word discipline: “How often do you find discipline in your leadership lexicon” [GH TL: 337]? While it may appear in military leadership manuals, the strong anti-military bias has led to the word discipline being lost in the academic literature: “We just don’t find it that interesting. We don’t emphasize it. Well, it takes discipline to be a student” [GH TL: 340-341]. Managing time was the specific example Gregory provided:

It’s not the content of the courses. It’s managing the time to study, the time to be in class, the time for social activities, the time to wash your clothes. It’s utilization of a scarce resource and that’s what you learn as an undergraduate that sustains you the rest of your life. [GH TL: 342-346]

Rachel admitted again that she is less familiar with the Ph.D. program than she is with the master’s program. She asked herself if perhaps the reason she had been struggling with the concepts of strategic planning was because of her personal perspectives as a result of her own MBA experience:

I’m just wondering now if that’s where my issue is, but I ended up working in leading change. I don’t know. I don’t know. Maybe we should have more. I do have a section that we talk about organizational development and I’m wondering what we cover in that. I can’t remember. That’s interesting. [RM TL:283-286]

The final question asked Gregory to discuss the gaps between where the program is now and where he would like it to be. With a touch of pride in his voice, he said that there is not a lot missing because they are definitely approaching the goals that have been set for the program. The program has increased faculty. The employment of every student that has graduated the program can be traced for the last 18 to 20 years. The number of students in the program are approaching the goal of 200. More faculty are being hired. Upon reflection, Gregory did present the following: “I
would like to improve our distance education offerings. I think distance education, more
so than classroom revisitation, is a necessity. You’ve got to go back and revisit your
distance deliveries” [GH TL: 358-359]. Other aspects of the program discussed include
the creation of a new master’s degree, as well as the pleasure that comes from being
recognized for a job well done. Finally, he discussed program eminence. Recognizing
the adult education program at the University of Georgia as one of the best in the
country, Gregory talked about striving to reach the highest goals possible for his own
program: “If you want to really be good, pick the best you can find, and I would love to
help develop a program [here] with the same kind of recognition as the folks at Georgia”
[GH TL: 370-372].

Rachel’s response to the final question regarding what was missing in order for
the ideal situation to exist in the adult education department was immediate and
emphatic:

Time! Time! I just don’t have enough time to make my classes exactly what I
want them to be and to improve them every single time, because I do. I want to
make them better every single time and there’s so many resources and things to
look at and to try to put that into a class and develop an exercise or create a
dialogue. . . . I just need that. [RM TL: 288-291]

Case 4: Community-focused State University (CFSU). One quote that
provided insight into this case was:

The language of adult education has become integrated into everyone’s
consciousness through the media, through television, through notions of lifelong
learning. Even if you listen to [the President] talk about the community college
initiatives and the workplace training initiatives, he’s captured adult education
language, the retraining language, and the language of lifelong learning, and that
we are always learning and so forth. [JS TL: 112-116]

Overview of Case 4. CFSU is a public research university located in the
Midwestern United States. CFSU was founded in the early twentieth century and
gained university status in the mid-1960s. According to collegedata.com, it provides undergraduate students with advantages typically found at both large research universities and small liberal arts colleges. For instance, CFSU is an inexpensive public comprehensive university that is large enough to offer 130 different majors, has more than 300 student organizations, and offers a highly sophisticated computer technology infrastructure. However, like a small liberal arts college, more than 90% of undergraduate classes are taught by full-time faculty, the academic buildings are a short walk from the residence halls, and the average class size is 31.

CFSU serves over 20,000 undergraduate and graduate students. According to the 2015 Annual Survey of Colleges, the student diversity profile of CFSU indicates that 83% of the student population at the main campus is White, 7.5% Black/African American, 3.9% Hispanic/Latino, 2.5% multi-race, 1.1% Asian, and 2.2% other races. Additionally 2.9% of the students are designated as international students.

According to the institution’s 2012-2017 Strategic Plan, CFSU seeks to become recognized for providing bright and curious students a holistic learning experience in and out of the classroom, as well as for bringing fresh and pragmatic thinking to the problems facing communities, businesses, and governments in the state and beyond. The mission of CFSU includes a statement about transforming information, knowledge, and judgement into actions that address complex problems. Among the many goals of the Strategic Plan includes the drive to provide distinctive, high-quality educational experiences. One of the objectives of this goal is to be a university that attracts a diverse student body, faculty, and staff. The performance indicator for this objective is to increase the number of international students to at least 1,000.
Participants for Case 4. The two participants interviewed for this case study are current faculty in the adult education program, which is housed in the Department of Educational Studies. The adult education program offers a Doctor of Education (Ed.D.) in Adult, Higher, and Community Education, which includes a major track in Community College Leadership; a Master’s Degree (M.A.) in Adult and Community Education, which also includes the option for a dual major degree with Executive Development for Public Service; and finally, a graduate certificate in adult education. According to the university’s website, CFSU’s graduate certificate in adult education is targeted to non-traditional students, typically 25 or older and ideal for professionals who want skills for designing, implementing, and evaluating adult education programs.

The first interviewee was Dr. Janice Shows [pseudonym]. Janice has been working in the field of adult education since the mid-1990s, and her expertise is in adult learning, teaching strategies, learning communities, community development, social capital, international issues in adult education, power and program planning, social justice, inclusive pedagogy, sustainability, and transformative learning.

The second interviewee is Dr. Barbara Miley [pseudonym]. Barbara an assistant professor in adult and community education. She is originally from China and obtained her Ph.D. in Adult Education from a major university in the Southern United States. Her areas of interest include adult learning; learning and tools such as culture, media, language, discourse, and social networks; learning community; community-based adult education; knowledge construction; and social constructionism. See Table 11 for an overview of the demographic information for the participants of Case 4.
Table 11

Demographics for Case 4 Participants

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Janice Shows</td>
<td>Female</td>
<td>Ph.D.</td>
<td>12</td>
<td>Associate Professor</td>
</tr>
<tr>
<td>Dr. Barbara Miley</td>
<td>Female</td>
<td>Ph.D.</td>
<td>4</td>
<td>Assistant Professor</td>
</tr>
</tbody>
</table>

The interviews took place consecutively in May 2015. Each interview lasted approximately 90 minutes. After reading the opening statement of the interview protocol and obtaining IRB consent from each professor, the interviews began.

Synopsis of the opening interview questions. The opening question asked each professor to describe a positive experience in their respective positions as a faculty member in the adult education department. Janice’s extensive response to the first question hit on many areas that would be addressed more directly in later questions in the interview protocol. Her enthusiasm for being asked to take part in this research project was apparent and her response to the first question asking her to describe a positive experience in adult education led directly to a discussion about her students: “Of course, the students are fabulous” [JS TL: 5]. She has led almost 25 doctoral candidates through graduation. She said, “The most joy that I’ve had has been working with truly amazing leaders within their doctorate programs” [JS TL: 5-6]. Most were “transitioning adults between a previous career and a new role in adult education” [JS TL: 7-8]. She discussed the continued relationship she maintains with most of the
students, often inviting them back to be lecturers or coordinators of workshops, particularly in transformative leadership.

Janice went on to describe in more detail a specific course that she claimed is the most fun with regards to teaching: “I have the wonderful opportunity to work with a course called Institute for Transformative Leadership, and that’s a five-Saturday course in the fall. We’ve done it now about seven years” [JS TL: 12-14]. She described how the course rotates between the faculty, though Janice’s taught it five or six times: “We discuss lots of different leadership ideas. . . . It really gets people thinking deeply about what is leadership and how do they embrace leadership in their experience” [JS TL: 15-18]. She said the specific value resulting from this experience is the bonding of the community, especially through the five-Saturday workshop framework. You get a much richer level of conversation. You get to know each other a lot better. We eat together. We commune together for eight hours five times. Usually there are two weeks in between, so they have time to process, reflect, and then come back together. It’s just wonderful to see group dynamics grow and shift, and it’s just the level and the deep, rich conversation that can occur in that five-Saturday format. [JS TL: 18-24]

She continued, “We’re interacting with leaders about leadership” [JS TL: 25].

Janice described additional outcomes of this five-Saturday format, explaining how the conversations are much stronger: “Two and a half hours every week doesn’t quite cut it. People get tired and it just seems to go on and on forever. You never really get deep into anything because there’s not enough time” [JS TL: 28-30]. She also described resulting opportunities for publication of articles or book chapters from what has come out of the longer format: “So it’s contributed to the research and model writing for the learners as a part of a research team that doesn’t end when the course is over, but continues over and after that” [JS TL: 33-35]. Another value that this format brings
to the student is the opportunity to bring in researchers and professors from other
institutions for deeper discussions about the material.

Janice then described the use of two reflective tools in her classes: Critical
Incident Questionnaires (CIQs), which contain five reflective questions the students
write after every week; and Brookfield’s journaling, 11 questions for journals about
emotional responses to learning which she requires from her students at least twice a
semester. Addressing one of the competencies that would come up again later in the
interview, Janice linked the joy of teaching to the idea of empowering her students:

So the joy of teaching is to know where the students are, to see their growth, to
see their learning, to see how they come together as a learning community, but
also as newly empowered—I hate that word—the way I used that word in my
classes is that’s a passive word. We teach people in these classes to claim their
power rather than be empowered, because if someone empowers you, they can
take it back. If you claim your own power, it can never be taken back. It’s the
notion of the object versus subject in Freire. [JS TL: 58-63]

Janice said she loves teaching, but does not consider herself a teacher-lecturer.
She considers herself very much the adult education teacher, a “facilitator of bringing in
resources, the people, the learning community, the environment of safety and food—ah,
food is very important” [JS TL: 68-69]. She described the “container of learning, which
is the environment and creating a safe space for learning to happen” [JS TL: 72-73] as
described in one of the texts used in her class. Janice continued, “So, yes, I love my
job. I love my job and there are lots of good experiences” [JS TL: 75].

Once she thought she had completed answering the questions, she insisted on
providing another example. She described recent visits to Highlander under the
auspices of community education classes and courses in Authentic Leadership. These
trips included international cooperation with faculty from adult education graduate
programs in Ireland, Canada, and the U.S.: “Adult educators trying to use some of the popular education methods and brought in participation training as part of the tool to use and then the arts-based research” [JS TL: 83-84].

Barbara also began the interview discussing the positive relationships she has garnered with her fellow faculty members at CFSU. Though there is little daily interaction with each other outside of faculty meetings, there is a solid foundation of friendship built within the department since nearly everyone came into the department at relatively the same time: “All of us teach adult education. We know that it’s very important and you don’t have that hierarchy built up” [BM TL: 11-12]. Referring to her students, she continued, “When we teach students, we are more like colleagues, instead of I’m a faculty member and you’re a student and that kind of relationship” [BM TL: 13-14].

The next interview question addressed Janice’s thoughts toward the future of the field of adult education. She began this part of the conversation by discussing her current role in the American Association of Adult and Continuing Education (AAACE):

Right now, there’s a lot of change, growth potential and excitement about where the organization is going. The organization does not represent the nation, right. It would be nice if it had a broader reach but because adult education is so broadly defined, it’s hard to make people who do the work of adult programming aware that there is a discipline and a theoretical base for adult education. I think continuing to raise that awareness through collaboration, through the master’s and doctoral programs that exist, but also as AAACE tries to continue the links to other organizations that serve continuing education, that serve human resources, that serve military training, that serve the professional trainings, and make those bridges. [JS TL: 99-107]

Janice described how a prominent member of AAACE has worked to construct a notion of an “umbrella organization” serving many organizations: “I think that will be the future
of AAACE and will continue to raise the level of awareness that there’s more to the work than moving tables around” [JS TL: 108-110].

In addition to her belief that the national association will play a big role in the future of the field of adult education, Janice also described the zeitgeist in popular media: “The language of adult education has become integrated into everyone’s consciousness through the media, through television, through notions of lifelong learning” [JS TL: 112-113]. As an example, she offered President Obama’s recent discussions about the community college initiatives and workplace training initiatives: “He’s captured adult education language, the retraining language, and the language of lifelong learning” [JS TL: 115-116].

Explaining that the “hierarchy of knowledge” [JS TL: 121] does not have to only reside within associations, organizational training programs, and universities; but that each individual has the opportunity to take that language into their own consciousness, she explained, “The hierarchy of knowledge will continue to become more entrenched in the society as professionalization and skill-building contribute to the neo-liberal policies of our government and our consumer society” [JS TL: 121-123]. Janice believes that the bridges between all the disparate levels of knowledge creation and transfer will not truly be well-constructed until “we have our own house in order” [JS TL: 127]. She sees the grassroots efforts of popular education and community education—church training in non-violent protests of the recent Baltimore riots, for example—as well as in environmental training, arts-based training, place-based training, “serving the voices of the unserved” [JS TL: 133]. She concluded, “So adult education has a place
everywhere—everywhere—in many people’s role, we all are teachers, we all are learners. Let’s claim that and move forward” [JS TL:137-138].

Barbara described the future of adult education as promising, though she cautioned, “We feel adult education is declining, especially in an academic field like [the] adult education program for doctorate and masters students. However, outside the academic field in the practice, adult education is very active” [BM TL: 17-19]. Barbara described conversations she had recently had with professors and practitioners in the field of adult education, describing it as “more than what we can imagine” [BM TL: 21]. Providing a couple of examples, Barbara talked about how in the field of math, training programs are continuously ongoing to increase knowledge of skills of working professionals; and describing a scene in an AT&T store, she said,

I went there and their technicians introduced me to the new products. You know, the way they introduced it, it’s so much like they know adult education so well. And they know what you need . . . the way they introduce the product is based on the levels of your knowledge about that product. So a lot of this, they don’t even know that they are adult educators. [BM TL: 24-28]

She described this as just a daily example of how adult education exists everywhere in our lives, whether we are aware of it or not.

With respect to the third question regarding the 2008 CPAE Standards, Janice provided multiple examples of how the leadership standard was active, including a specific track on racial healing that one of her colleagues in the department has undertaken: “Leadership, absolutely . . . embedded throughout the other curriculum pieces” [JS TL: 162].

However, for the standard related to global issues, Janice admitted that “it is not as visible and not as obvious” [JS TL: 165]. She provided a few examples in the
doctoral program, including a lifelong learning seminar she runs periodically which has an international adult education focus:

Being that most of our students are pretty local, we don’t do a lot of international discussion because we’re trying to cover content and keep things where they are. When it’s appropriate, I try to bring things in. // I don’t know, I don’t know. [JS TL: 167-172]

Janice added that she has posted articles and readings with an international flair at times, but given the demographics of the students, it hasn’t always been met with positive reactions: “So it’s not as strong as it probably should be, but we try” [JS TL: 176].

When Barbara shifted to the question regarding the 2008 CPAE Standards, she said she had read them, but did not know them in detail. Discussing the standard associated with leadership, she indicated that the focus for the program at their institution was really on community involvement. One of the selling points for the university is its focus on the local level of involvement: The larger state universities have a broader focus on leadership issues, especially in a global context. Referring to the perceived focus of the university, Barbara said, “They just don’t think that way. I think they identify this university—we should address local issues and that’s what happened when I started to teach” [BM TL: 53-55]. She went on to describe an early attempt at bringing materials related to global volunteer efforts into her classroom, and how it was met with intense pushback from the students: “Why do we bother to even know this? We work for local places. We don’t really care about volunteers working out of the country because we never have that opportunity” [BM TL: 58-59]. Barbara also talked about how her conversations regarding her international experiences were not met with enthusiasm from the students, and they complained on the course evaluations that the
university “brought too many international students here” [BM TL: 64]. Lamenting this thought, Barbara added,

I think they’re probably concerned about the challenges after they graduate. These international students from other countries, they’re excellent. That is a big challenge. I think that’s probably one of the reasons why they really are against us bringing the international news. Because emotionally, you are against that. You don’t like the outside world to step in. You’re emotionally against that, so you don’t even want to read something about that. [BM TL: 64-69]

Barbara insisted she still provided readings and other materials which allow for conversation regarding lifelong learning processes in other countries, but she is convinced that “some students just don’t like that global mindset, or maybe after years of teaching, you gradually get used to it” [BM TL: 78-79].

The fourth interview question asked the professors to describe an experience in adult education with an international component. Janice talked again about the collaboration she undertook with the faculty from Ireland, including the trip taken to Highlander, presentations conducted with graduate students and faculty, and a conference trip to the Adult Education Research Conference (AERC) that year:

It was wonderful to spend the time with them and I see our own nation through their eyes and get a sense basically to see how they’re perceiving what we do here and interacting with our audiences because of course, you take the home environment for granted. [JS TL: 186-189]

Janice also discussed again her experience in Saudi Arabia: “The cultural competencies in Saudi Arabia are so hierarchically defined, it was very challenging to see this linear knowledge” [JS TL: 194-196]. She described the process of education in Saudi Arabia as very traditional, whereby the students demanded study guides and specific answers before taking tests. And while under a US-based structure Janice would not give traditional tests, she felt that she had to under the specific context in
which she found herself. She offered case studies and application-based assessments to the students, but found that this was met with irritation from many of the students who often protested the grade and protested the process because there was no way to cheat or collaborate. She added, “Three or four girls afterwards said, ‘You are the only teacher who has ever made me think in a class’” [JS TL: 203-205].

Janice also described a conflict of interest in the working relationship she had with one of the women who had invited her to come to Saudi Arabia. Janice said her work ethic was such that she took on additional responsibilities for herself and the department. When the colleague found out about this, it led to a complete disconnect between the two of them for the rest of the trip. She added,

American, Midwestern, white middle class girl with German-Polish background and that work ethic, as an adult educator, it means you can do a lot in the States. It means you can’t do a lot without hierarchical permission in some other spaces. [JS TL: 217-219]

As an international faculty member, when Barbara was asked about international experiences in adult education, she focused on her experiences working with scholars and practitioners from other countries. She emphasized the need for students and faculty to “have some other skills and knowledge which really connect to the international world” [BM TL: 90-91]. Speaking of her time in China, Barbara spoke about the need for the kind of cultural exchange of knowledge and information in order to function in today’s workforce: “You have to know this, some rules and culture that you need to know how to work with other people” [BM TL: 100-101]. She spoke of the leadership trainings directly invested by the country and the corporations, and how the universities encourage this kind of exchange which has resulted in so many of her colleagues receiving the opportunity to study and work in other countries. These kind of
exchanges are having a direct impact on the culture back in China. Speaking about her time with the electric power industry, she said,

Before, the power industry was really totally controlled by the government and they are not really worried about losing their nob, and now the situation is different. They really learn about the cultures and how to understand, how to work with leaders in other countries. [BM TL: 107-109]

Comparing this experience to the situation she sees in the states, Barbara continued, “So this is something that we need to know and also we need to know the management, knowledge, and skills, which is totally different from the management in China, which is really hierarchical” [BM TL: 110-112].

Barbara also described another international experience in Sweden. She had visited with a number of Chinese educators ostensibly to learn about study circles in the country. But it was the cultural exchanges that the group most remembered, such as ramps for disabled people at a bus stop, the hard-and-fast pace of the workers, and grocery stores where the customers weighed and paid for the vegetables themselves.

We were very surprised how the people have so much freedom and people trust each other, so highly trust each other. Even though that is not in the schedule, what they can see, what they can feel, and that really makes them feel that is a different world . . . and they are culturally shocked. [BM TL: 122-125]

These experiences are the ones that the educators bring back home, fresh ideas that generate the kind of change that only an expanded global mindset can provide.

The final question before addressing the specific competencies of Bird’s (2013) framework dealt with Janice’s impression of the term global leadership. She began with a description of “the American superpower as the directive military base for global leadership” [JS TL: 227-228]. She added that the first thoughts were those of global politics, for example the United Nations, the European Union, the relationships between
the American president and the other economic trade partners and defiance leaders such as Hugo Chavez. She also moved on to the idea of global organizations in the non-profit sector, such as Doctors Without Borders, the Peace Corps, and other non-governmental organization (NGO) sectors. Taking the next step, she thought of international businessmen, “because world business is a global world and what knowledge do businessmen provide in this kind of dialogue” [JS TL: 241-242].

Considering all three segments, she referenced Cunningham and said that her question is this: “Who benefits from even asking about competencies related to global leadership? For whose purpose are we defining it” [JS TL: 245-247]? Barbara’s concept of the construct global leadership is tied to the idea of leading change: “You need to really interest people and change things either through some ideas, some concrete actions” [BM TL: 141-142]. An ability to relate and understand others, while not necessarily agreeing with them, is important to the idea of leadership in a global context: “I think in order to collaborate with people in other countries, a lot of times the misunderstandings occur by not understanding why they do things” [BM TL: 145-147]. Additionally, Barbara emphasized the need for a global leader to be well-traveled and technically savvy, especially in the field of adult education. She highlighted the concept of a massive open online course (MOOC) and the access this kind of technology is providing to a world-wide audience. Describing an example of a time when she had to organize a conference, Barbara described the cultural differences she understood between how she was running the preparations and how her Chinese colleague expected her to perform. In China, the students would be tasked with much of the work as a result of the hierarchical position within the education structure, and the
colleague from China thought that all the work Barbara was doing was an insult to her position as a professor.

I did not say anything because I understand why she asked that question. This is because of the cultural difference. If she’s the professor here and she saw the student not do things for her, she would probably get very upset because that is where she comes from. [BM TL: 155-158]

Synopsis of the global leadership competencies. The material presented in the following three sections represent the three categories of Bird’s (2013) nested framework of global leadership competencies: (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen. Because each professor discussed the competencies in the order in which he or she rank ordered them, the data from Janice will first be presented with regards to the category managing self, followed by the discussion of the competencies of this category by Barbara. The same process will be repeated for each of the other two categories of Bird’s framework. A final selection of the closing questions will follow the presentation of data of the key questions regarding the global leadership competencies under inquiry.

Managing self. Janice chose to begin the conversation regarding the category of managing self by providing the following rank order: (1) inquisitiveness, (2) resilience, (3) character, (4) flexibility, and (5) global mindset. Briefly describing each, she offered inquisitiveness as the most important because if the students aren’t asking questions and showing curiosity, then they are not going to find success in a graduate program. With regards to resilience, she described the need for students to be able to survive the disorienting dilemma that occurs when deep questioning and reflection occurs during the course of the graduate program. Students must be able “to hear and be open to new knowledge coming in and they run away and hide, then they’re not going to learn
as well or be able to be as successful to transition into whatever is the new setting” [JS TL: 263-265]. Transition is key, “First ask the question; then be open to transition” [JS TL: 265].

Janice said character is helpful because the students need to know who they are and be able to reframe themselves depending on the context in which they are working. Flexibility permeates all of the above, and global mindset is directly associated with inquisitiveness: “Global mindset is being open to others, anyone else” [JS TL: 273-274]. She described the value the students are experiencing as a result of the large number of Saudi and Chinese students currently involved in the program. However, she reiterated that global mindset does not have to focus only on global issues. For example, it can also encompass issues such as race relations and LGBT issues and internationalism—whether that’s a reflection of the Latino culture, the American southern culture, or the acceptance of other people “where they are and being open to knowing and learning from others” [JS TL: 283-284].

Following this normative explanation of the five competencies within this category, Janice went on to provide more specific examples within the curriculum and co-curricular elements of the program. For example, she returned to her conversation about students learning together in the learning community: “By constructing a learning community, having working groups and sharing ideas that are not always easy, ideally these things will be provoked in that process” [JS TL: 287-289]. She provided further examples of specific courses and texts used in a variety of classes, including texts associated with transformative leadership, race-based workshop, and teaching strategies for diverse context:
Then, of course, once you start talking about race, you start talking about other groups that are in society and you raise the level of awareness about Americans, about Latinos, about the gay and lesbian community, and of course, people in the classes are part of those communities and they at times will contribute specific examples to that dialogue. [JS TL: 296-299]

Co-curricular elements where these competencies are fostered include the field trips to Highlander as well as external workshop experiences for the students. Additionally, the institution hosted the Midwest Research-to-Practice Conference which brought in around 100 professionals from the regional and national community, continuing the notion of asking questions about the learning process and a dialogue around the concept of self-knowledge. Internships were also mentioned as an example of opportunity for community work. Janice requires her students to go out and interview leaders in the field, to volunteer with organizations, and to serve as interns within many contexts. Janice described this process as *forced outreach*, claiming that it is even more powerful in an online community where the students “don’t touch each other unless you force them to go out to each other” [JS TL: 319].

Barbara began her discussion of the category managing self with the following rank order: (1) global mindset, (2) inquisitiveness, (3) flexibility, (4) character, and (5) resilience. Barbara’s comments regarding this category stayed within the realm of the competency of global mindset, however. She first spoke of the challenges that the institutional expectations of working with local community partners force her to face:

In our university, we provide grants to encourage faculty members to work with local communities. But I always said in our meetings, you know that's just not good because that means you only can stretch your work within the local community. You don't really give the opportunities to work with the people [and] institutions outside of the university, [you] don't really encourage students to look at much bigger contexts. Even though you can get money for this if you want to do that. [BM TL: 180-185]
Barbara described a curricular example where she asks her students to do projects exploring different organizations, offering them the change to focus on local entities or to go international with their selection. In her course Adult Learning Theories, the project she assigns ask students to investigate a program which they believe uses one of the theories and the framework in the design of the program, so that “through studying these programs, they will understand how these adult learning theories can be applied [in a] different, practical context” [BM TL: 190-191]. Rather than telling her students they had to choose a local program, she suggested that they can choose any program in the world. Some of her students took up her offer, and she got a number of projects where the students investigated programs in other states. However, she recalled,

I remember one student—he really found one program in Australia and they use transformative learning to design their program. He’s a very interesting man and he collected documents about how the program is organized. Then he contacted the leaders there who organized the programs. He interviewed them and then later he designed a program based on his experience about his [investigation] on that program. He has been known to evaluate that program he designed based on models he learned from their program. So later, their leaders were very happy with this experience. [They] even [wanted] to have a collaboration with him. Of course as a student he works in a library. He says, oh I’m sorry this is just my assignment [laughter]. But I think if that student is working at that adult education institution or something like that, I do think that is a very good opportunity. Why not, right? It’s very related to what we are doing and you build connections with outside work. So that is one example of how I encourage students to really view the connections with the outside world. [BM TL: 193-205]

Barbara explained that because she teaches a majority of her courses online, she can provide reading materials which relates to adult education in other countries, “just to give students some perspective from other countries” [BM TL: 208]. She also makes specific comments in the discussion boards relating the information under inquiry
to the global context: “I would highlight what we talk about and let students see that—to pay attention to that” [BM TL: 210-211].

Barbara also said that she often shares her experiences and examples from China and other countries in which she has travelled and worked, “because this is something new for them. They don’t really know about that” [BM TL: 212-213]. Barbara described a specific online discussion related to one of the adult education series regarding food and nutrition. Bringing into the discussions her experience of food and nutrition from multiple, global perspectives, including why Americans waste so much food, the trend toward fast food consumption, how to eat healthy food, and how this can relate to healthy bodies; Barbara said these examples challenge the assumptions that her students have and can really change attitudes as well. She added, “There’s different ways to address this. You don’t really need to say, okay, this is global—there’s a topic, let’s talk about this. There’s different ways to really embed these ideas” [BM TL: 221-223].

Managing people and relationships. Before providing a rank order of the five competencies in this category, Janice said that these were “all good . . . all good. Ideally, we do all those things” [JS TL: 325]. She then provided the following rank order: (1) valuing people, (2) interpersonal skills, (3) teaming skills, (4) empowering others, and (5) cross-cultural communication. Though she confidently rank ordered the first two competencies, stating “if you don’t value others, you can’t really teach” [JS TL: 327-328], she then hesitated and explained that this process was very difficult because there is so much overlap between all of them, “they’re always nested together” [JS TL: 329].
With regards to teambuilding skills, she emphasized the importance of these skills in adult education teaching methods: “How does an adult educator teach? They facilitate. How do you facilitate? You facilitate with small groups of people to act together to do something and that usually can be defined as a team” [JS TL:338-340].

Moving again to a conversation of empowering others, Janice explained that it’s “the notion of object versus subject power, a.k.a. empowering others” [JS TL: 345-346]. She continued, “It’s the idea that you have knowledge power in a relationship and that you can claim your own power to act rather than be a subject” [JS TL: 346-347]. Finally, she stated that cross-cultural communication incorporates all of the other competencies: “We have to be open, we have to be willing to engage, we have our group to engage with, we have to respect others, and you have to acknowledge . . . power in order to communicate” [JS TL: 350-352]. She ended that part of the discussion with the comment, “Hard! That was hard” [JS TL: 354].

Janice then began to discuss ways in which these competencies can be incorporated into the curricular and co-curricular elements of the adult education program. The learning community developed in both face-to-face and online courses provides opportunity to foster all of the competencies associated with this category. Valuing people is demonstrated by the required responses and postings associated with the words and ideas of the fellow students, which in turn requires an increase in interpersonal skills so that differences and similarities can be communicated effectively and critically. Collaborations in the process of providing contribution to the literature is another way of valuing people, demonstrating interpersonal skills, and often cross-cultural communication. Teaming skills gained from small group work and
presentations, especially in online learning communities, require constant communication across multiple platforms, which in turn is another way of acknowledging the power structure between individuals in a given scenario. Janice spent time reviewing the detailed way in which she facilitates the weekly online forums, demonstrating how the team-building, role-rotation, and empowerment of each student is fostered on a continuous basis.

Barbara began her discussion of this set of competencies by describing her philosophy that “knowledge really is power” [BM TL: 228]. Speaking of power, she said,

Some people, they may think not until you change or improve people’s situation to fight for their rights or something like that. That is fine, but I think what you really can change people is [to] really help them to understand what they are learning. I think that is a very big power that you have. [BM TL: 228-231]

She described one student who was a single mother with several children who lived in a poor neighborhood. This student had never really had a proper foundation in learning about the working environment. Barbara explained that in her course, the students are asked to go to the local community to talk to the leaders who organize the programs under review, to interview them, and ask questions related to the course assignments. Barbara said through the weekly online assignments and discussions built into the course objectives, the students are required to do a lot of work every week. They need to read, to respond, and do the assignments. After a few weeks, they really have gained a lot of adult education knowledge. Referring back to the student who was a single mother, she said at the beginning, this student claimed to be “very nervous because she never had a chance to go inside a community to talk with a leader” [BM TL: 240-241]. Barbara said this was all so new for the student and that she had no confidence at all:
She did not believe that she could even talk with them. And then when she talked with them, she asked them questions, she found out—oh, I know them all! And then for the first time she felt confidence. She [the student] said, “You know, I’m not that bad at all. I could become one of them.” That is so powerful. [BM TL: 241-244]

Barbara said, “So that’s why I said, no matter how you give them materials or other good things—give them help—but the biggest help is to help them understand, to have gained the knowledge, help them gain the confidence” [BM TL: 245-247]. Barbara said that afterwards, the student told her she had really gained so much confidence, so that she felt that after she graduates, she could find a job to work like those leaders in the field: “That is the one thing I think that you are asking about with regards to power” [BM TL: 248].

Barbara paused for a minute, contemplating her next words, then said,

I think sometimes students, you need to push them outside of the comfort level because sometimes they feel—especially some students from very small areas or small towns, much bigger world, so sometimes we don’t even think about things that are much bigger. Let them be aware of things, especially to let them know that you are capable of doing things. You are capable of communicating with outside world. And that is something they did not believe they had. So that’s why you give them assignments. You simply ask them to go outside, to communicate with these people, to access these resources. That is something we must do in order to give them a grade. So that forces them to go outside, to come in contact with these people and to talk and during the process of doing their assignments, they have to talk, they find out they actually knew a lot. So that is something that really motivates them to learn new patterns for the new material. [BM TL: 250-259]

She concluded with this thought: “Sometimes students are uncomfortable, but we need to push them. At the end of the semester they will see a bigger picture, [and understand] why I pushed them like that” [BM TL: 260-261].
Barbara provided the following rank order after her conversations regarding this category of Bird’s (2013) framework: (1) cross-cultural communication, (2) valuing people, (3) teaming skills, (4) empowering others, and (5) interpersonal skills.

*Business and organizational acumen.* After reviewing the five competencies associated with this category, Janice provided the following rank order: (1) vision and strategic thinking, (2) leading change, (3) organizational savvy, (4) business savvy, and (5) managing communities. She believed the vision and strategic thinking competency has to come from a deep desire: “People who can’t see themselves any other place won’t enter a master’s degree. . . . Folks have to have a vision of where they are able to move toward to be able to enter any kind of graduate program” [JS TL: 414-418]. By the same account, she said the competency leading change was next because “if you can’t change, then you can’t learn” [JS TL: 421]. Referring back to the first category of competencies, Janice stated that one has to be able to recognize where you are at the onset, and then discover the strategies to facilitate the change you are seeking as a result of undertaking the graduate program, emphasizing that deep reflection is a particularly effective strategy for this discovery process.

The competency of organizational savvy is evident in the selection process for the student’s doctoral committee. Understanding the dynamics of the committee members and knowing how to navigate the personality dimensions of all of the players is a skill which is developed as a result of the graduate program. Additionally, Janice said she was a very organizational person, “My program planning is what I do. It’s what I love. I love program planning. I love bringing people together for a purpose, an educational purpose that improves society, that’s what I do” [JS TL: 435-437].
Shifting to a discussion of the application of these programs in the curriculum, Janice stated that there is an ideal situation where all of these competencies are addressed, but the reality is that they are not always done as well as the faculty would hope.

Because this program is centered on social justice and community education, we hope that we do this well and that’s one reason we force again those conversations about race and around justice and around groups that are not always this centered. So we don’t serve corporate trainers in this program very often. When we do, they don’t like it. They run away screaming. [JS TL: 446-450]

Janice went on to say that if a student wanted to focus more on the HRD side of adult education, perhaps a different adult education graduate program would be better suitable: “Every program has its own context. We do transformative leadership here, community-oriented” [JS TL: 455-456]. She said while some skill building is addressed, it is not the focus of this program. As a result, vision is very important for the student at the onset of their graduate studies so that they know exactly what they are getting into when they start their program: “So we start with their enthusiasm for their own transition and their own change as an individual and then we tie it to the theories of adult development, societally and individually” [JS TL: 46-462]. Janice emphasized again the importance of the social aspect of change, claiming that individual power diminishes if you cannot help people think in a social group context. Providing an example, she said,

One crazy person protesting at the White House isn’t going to be seen—unless they land an airplane—but the grannies in Canada gather many women, they bring their rocking chairs and they rock in the state house. They protest in context in larger groups and they are seen as a voice of resistance because there are many. One would be invisible. If you want to make changes, you have to think in a global way and bring others along. [JS TL: 464-468]
Social change, privilege, whiteness, racial healing, acknowledgement of those in need—these are notions directing the vision for the adult education program at this institution: “A lot of our students are first generation college students, much less first generation graduate students, and can identify with marginalized groups in their various ways” [JS TL: 474-476]. Faculty provide direction for discovering the connections between individuals, and then building vision from this larger context towards the change that takes place during the graduate program: “It helps push forward an activist knowledge and a collective transformation. That’s the idea” [JS TL: 479-480].

Janice further discussed particular courses that address strategic planning, organizational savvy, and community education as well as a number of on campus initiatives from a colleague related to youth groups and the art museum. Janice also described on-site visits to local organizations in her Program Planning course, including a women’s homeless shelter and the connections between her Foundations of Adult Education course and the practical application of adult education. Cooking, shopping, budgeting, nutritional understanding are all useful aspects of the adult learning process. Furthermore, Freire’s acknowledgement of the subject-versus-object ideas and the discussion about empowerment are discussed in the program planning course: “It talks about revolution in a kind education way, and it talks about serving others. So it’s the why [emphasis added] part of program planning” [JS TL: 507-508].

Another example of curricular application of these ideas comes from a discussion of race:

We talk about more why [emphasis added and how [emphasis added] do you serve audiences that are hard to serve. So it’s all about power and practice. It’s all about these things in acknowledging the role that adult education has as a negotiator of power. We are never ever the one making the final decision
because there’s always someone funding us, there are always learning who can walk with their feet, there are always the other stakeholders in the room. [JS TL: 510-515]

Concluding her thoughts, Janice said, “If you understand that you have a place of power from the margins, as the program planner negotiating up and down, then you can do a lot of work and you can do a lot of really good work” [JS TL: 517-519].

Barbara began this part of the conversation complimenting the probing questions, saying that they really explained these competencies nicely in terms of adult education and helped her to understand better the context for the discussions. She said these five competencies may not be specifically trained in the program, but for her, she spreads all of these ideas throughout the course context. She said she highly emphasizes technology tools in her course: “In an online context, a lot of times people just write something. They don’t really talk, which really loses a lot of personal touch there. So that’s why some part of the course, I ask the students to talk” [BM TL: 269-272]. Explaining further, she said, “We record. I ask them to blog, to summarize what we have done every month, and what they expect to do in the next month and what their plan is for the next month. So it’s a very manageable process” [BM TL: 272-274]. She admitted,

Some students really don’t like that. They say, “Well this is not a technology course, why do we need to learn so many technology tools?” And I say, “Yeah, this is not a technology course. However, you’re in adult education.” Nowadays, everybody uses these tools. [BM TL: 274-277]

She asks her students how they plan to market their program if they don’t use social media; how can they reach the younger generation? Barbara said she helps the students through this process with short reading assignments on the development of the skills necessary to use the technology: “It’s very short, seven-minute readings about a
step-by-step [approach] to do that. Everybody can learn that” [BM TL: 280-281]. After one semester, the students have significantly increased their competency in the use of technology.

With regards to the competency of vision and strategic thinking, Barbara was less sure of how to describe this from a curriculum point of view: “I don’t know about that. I think I always ask a student to really connect to what they are learning to what they want to do in the future” [BM TL: 284-285]. Barbara said one student approached her midway through one semester and said the monthly summaries he was required to do was made so much more effective when he realized that he could connect it all to his work and his plans for the future: “I need to remind students to reflect that and to write a plan on how this can relate to your work” [BM TL: 289-290]. She said she also emphasizes this connection in her discussion questions.

Discussing the competency of leading change, Barbara said that these same ideas of connecting everything to the student’s career aspirations is another way in which she manages her courses:

So my course assignments are sort of like a program. One assignment leads to another. So for example, in the Learning Tool course, the first assignment is about literature review. And when I create an assignment, I can tell who learned well and who did not. I give suggestions. The next assignment I asked them to identify a program that relates to this Series and then if a student could not do the second assignment well, I know they did not learn from my feedback. [BM TL: 294-299]

Barbara talked about teaching the concept of “embodied learning” and how she was able to assess whether or not the students understood the concept:

If they don’t understand that concept, they could not do the second assignment because the need to locate a program which uses embodied learning. If you cannot learn that and not identify that program . . . they could not do that and I
tell them to go back to the theory to learn what specifically that is about. [BM TL: 300-302]

The next level, she continued, is to create their own program based on what they have learned about the concept of embodied learning: “And that is really how they turn what they have learned into actions; specifically, to create a program that is very detailed because you want to apply that and you want to use that in practice” [BM TL: 305-307]. This progression of assignments is her method for determining the kind of change taking place in the student’s performance:

The final assignment, we bring all this . . . together, to bind it together into a final demonstration. And then after the final project, all these things come together . . . to a bigger picture and now they really understand how this theory works. [BM TL: 308-311]

Offering another example of assessing change, Barbara said she also conducts a mid-term course evaluation which tells her what the problems are and what the students have learned. A final reflection is, of course, done as well: “Tell me specifically what you have learned. Then I know that they really learned something” [BM TL: 314-315]. In conclusion, she said they also have a final survival piece. This asks the students to describe how they survived the course, how to describe the ways in which they have learned new skills, time-management skills utilized, professional skills, team-working skills, and how the communication persisted between the classmates, including the interactions that took place: “So they can learn from each other, because all the assignments are presented so we can really interact with each other” [BM TL: 319-320].

Barbara provided the following rank order after her conversations regarding this category of Bird’s (2013) framework: (1) vision and strategic thinking, (2) leading change, (3) managing communities, (4) business savvy, and (5) organizational savvy.
The final question regarding the competencies asked each of the professors which of the 15 really stood out as most relevant to the adult education graduate program. Although Janice said they were all good, she mentioned vision and strategic thinking and inquisitiveness as the two that most stand out. Following that, knowing the territory is important, so she listed organizational savvy as a third competency to highlight. Interpersonal skills and empowering others followed.

Barbara listed vision and strategic thinking, inquisitiveness, flexibility, business savvy, and organizational savvy as ones that stood out for highlighted success for her students, though she declared that all fifteen competencies were important, even if they may not be specifically addressed in the adult education program.

I asked if there were any competencies missing from the list, and Janice immediately asked, “Where’s social justice? I know you can build that into everything, but if you’re using this framework in a business setting, you may not get that point of view” [JS TL: 537-538]. She then described the so-called triple-bottom-line, an accounting tool with the idea of sustainability built into it. It looks at the profit margin, environmental impact, sustainability of life, and wage and fairness. “You might want to bring that into your story as well. That’s a bridge that brings into life the notion of human resources, natural resources, profit—social capital. I think that is very close” [JS TL: 541-543].

The final question of the interview asked about the gap between where the adult education department is now and what the ideal would be with respect to global leadership. Janice discussed the desire for more activities built in to the program for cross-cultural communication, for example international trips and study abroad
opportunities. She said it may be available, but it is quite challenging to set up for faculty under existing workloads. Additionally, Janice would incorporate more cross-cultural dialogue between international students and faculty. Discussing her faculty, she said, “I like a lot of things that we’re doing in our program, part because I’m part of it, part because the people are really innovative and collective-minded. Personalities are always challenging and people like self-promotion too much” [JS TL: 561-563]. She believed a well-rounded experience by the students is the goal, however, with faculty who have different knowledge sets and different teaching styles.

Barbara addressed the final question by discussing the need for policy support from the institution:

I really think policy should play a very important role . . . because policy really drives people’s action. And when you’re working in an organization like this, you don’t really work outside of the policy even though you want to do something alone. However, if there’s no leadership support and no policy support that could be very difficult. [BM TL: 334-337]

She reiterated the university’s emphases on working with local communities:

If you work with a community, you will be highly supported and you get the financial support and you get opportunities and also this is a [state] promotion policy. . . . That can directly influence your salary and influence your promotion and tenure. [BM TL: 338-342]

Barbara said that even if you do not work on something, you may do so because you sometimes think it will be a benefit for your career:

That’s why I said policy is very important. And so for this—you talk about global leadership. If the university doesn’t really have the policy to really support this, I will not be very optimistic about including or integrate this global mindset into our teaching practice. Because we are very busy, we don’t really have time to address something we don’t really pay attention to. We don’t really highlight that. Why be bothered? [BM TL: 344-349]
She emphasized she would not always feel that way because of the seriousness with which she takes her duty as a professor, but the idea of exploring something new would be difficult without institutional support: “It takes a lot of time to even expose that, and then we don’t acknowledge that because there’s no policy for that. // If you think it’s important, embed that into the policy” [BM TL: 351-355]. As an example, she spoke of the success one of her colleagues has had in integrating the concept of race everywhere:

When she sends the emails, she can send an email to the whole university. There will be awareness or something like that. So at least you’re aware. And then once she had meetings and conferences, she sometimes would indirectly lead to this direction. [BM TL: 358-361]

She said this colleague, who is also a professor in the adult education department, has successfully incorporated the topic of race into all aspects of her career: “In teaching the course, she would embed the course materials, the readings, and specifically emphasize on the assignments” [BM TL: 363-365]. Barbara said any attempt to integrate the concept of global leadership into adult education must be integrated “from the top policy all the way to the variety of practices, emails, conference—everything” [BM TL: 366-367].

**Case 5: German Research City University (GRCU).** One quote that provided insight into this case was “I’m always looking for ways to explore more and to take it further, to have some collective learning or collective experience” [KE TL: 615-615].

**Overview of Case 5.** German Research City University (GRCU) [pseudonym] is a well-respected, metropolitan university with a strong international focus on research, teaching, and students. For over 200 years, GRCU has concentrated on scientific challenges, socially relevant research, and exceptional teaching. Recently chosen as a
“University of Excellence”, GRCU ranks among the top 10 of all German universities. Partly due to its location, GRCU has developed close relationships with northern, central, and eastern Europe. This network has now been extended to universities and research centers all over the world, with particular attention to institutions at the edges of the western world.

According to the university website, GRCU supports over 34,000 students, with over 5,000 of those students identified as international students. The university has nine faculties, and offers 190 undergraduate and graduate degree courses, including nearly 60 bachelor degrees, nearly 90 consecutive master degrees, and 15 postgraduate degrees. With over 2,000 lectureships and research assistantships as well as 419 professorships, GRCU stands as an example of academic excellence in Germany. For the purpose of this study, GRCU offers a Master’s of Arts (MA) in Adult Education and Lifelong Learning within the Faculty of Humanities and Social Sciences.

**Participants for Case 5.** The two participants interviewed for this case study are faculty in the MA in Adult Education and Lifelong Learning program. The first interviewee was Dr. Karsten Edelson [pseudonym]. Karsten is a junior professor, which equates to a non-tenure assistant professorship in the United States. After completing his Magister, he worked on a number of research projects and at two research institutions in Germany. He has wandered between the business education and vocational training worlds of adult education since the 1990s. He earned his Ph.D. in 2007 and began working at GRCU.

The second interviewee is Dr. Caroline Nieke [pseudonym]. Caroline is an extensively published and highly respected scholar in the field of adult education and is
a visiting associate professor at GRCU, on a six-month leave from the German Institute for Adult Education. Her areas of specialization include program planning, educational culture and professionalization of adult education organizations, and socio-spatial analysis for participation in learning organizations, as well as an international comparative perspective. See Table 12 for an overview of the demographic information for the participants of Case 5.

Table 12

Demographics for Case 5 Participants

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Karten Edelson</td>
<td>Male</td>
<td>Ph.D.</td>
<td>8</td>
<td>Junior Professor</td>
</tr>
<tr>
<td>Dr. Caroline Nieke</td>
<td>Female</td>
<td>Ph.D.</td>
<td>1</td>
<td>Visiting Associate Professor</td>
</tr>
</tbody>
</table>

Synopsis of the opening interview questions. The interviews took place on consecutive days in each faculty members’ respective offices in the large, inner-city stone building in the heart of Berlin. The first interview question asked each participant to discuss a positive experience in the adult education graduate program at GRCU. Karsten said that while a number of ideas come to mind, he decided to focus on the success of a specific course called Program Planning. He described this course as being attended by mostly working adults: “We have a very strong focus in this department on this issue, and still many people don’t really understand what it’s about
or the value of it” [KE TL: 26-28]. He said that skepticism regarding this course still exists from the students before they really get involved in the details of the requirements for the course. Many students believe it is simply a course on curriculum development or perhaps not really practical in nature. The students often come into the course with no clear understanding of what program planning is really all about. Karsten explained the preconceived apathy toward planning because in Germany, it is often perceived as a boring endeavor with significant amounts of paperwork, where people just sit around their desks and work on creating tables in spreadsheets.

Karsten mentioned another course he had taught recently at a different university which also created a strong positive experience in his adult education career. Having received comments beforehand from students about their low expectations in relation to the topic of program planning, he devoted a significant amount of time in his instruction relating the work to the people taking the class and their specific job situations. Whether the context was business enterprises, church associations, Volkshochschule (German adult education center), or one of many other specific working contexts, the students in his course were able to discover similarities in the planning and an “interactive notion of planning” [KE TL: 45]. Through his teaching style of relating the material to real-world applications, he was able to help the students understand the proficiency that can be gained by following a step-by-step approach, including needs assessment, scheduling, budgeting, creating, and evaluating the program. However, he added, “practice is a part of program planning. It was a very positive surprise for them” [KE TL: 46-47]. Karsten said he was still teaching some of these students through their final theses on the issue of program planning and the students were still actively
engaged in asking questions and seeking conversations. He said, “We started something which was not considered as being relevant or [somehow] less important” [KE TL: 51-52] and, according to the course evaluations, turned out to be one of the most interesting of subjects.

Caroline addressed the course in program planning as well. She spoke extensively about the sub-discipline of adult education within the field of educational studies at the university. She said although only two or three programs exist in the country explicitly offering degrees in adult education, the importance of the many universities around the country with adult education as sub-disciplines matter as well:

It’s quite normal [that] what you usually do if you don’t have that second field, such as literature or whatever, is that you become a program planner. You won’t necessarily become a teacher, would you? And a lot of people end up working in planning processes in adult education. So it’s really important that we get them, too. [CN TL: 52-56]

She went on to explain that in this department, while there is a Bachelor of Educational Studies and a Master of Education Studies, there is also a master’s program in Adult Education which is “really meant to bring in people who come from the field” [CN TL: 60-61].

The next question asked the participants about their perceptions of the future direction of the field of adult education. Karsten paused for a moment, then said it was an excellent question to consider. From a very broad perspective, lifelong education or adult education “is of increasing importance for the future” [KE TL: 58]. Changing demographics in Germany regarding the aging population and the issue of migration are creating an increased need for adult education measures: “We have to look at . . . the change of knowledge production and so on, all these explanations as to why adult
education will be of importance” [KE TL: 60-62]. This general micro-trend, he said, will likely continue, though it is only part of the story.

The other side of the story, he continued, demonstrates a cause for skepticism and a need to take a critical look at the future of the field of adult education. Karsten spoke of a recent convincing keynote speech he had heard from a Serbian colleague. The speech was about changes taking place in the field of adult education in Germany as well as other countries. Adult education was something that was often “left behind the traditional education system” [KE TL: 70], though it is now receiving increased attention and awareness by policy makers, administration, and corporate enterprises. He cautioned that this increased scrutiny could affect the future of adult education in order to meet the goals, ideas, and objectives of these outside influences:

I think it’s increasingly a challenge if you would describe something like a core idea of adult education connected to enlightenment, humanism, having individuals and groups to find orientation, to find their own way; but also to stimulate something like solidarity, joint action, community development, all these issues. [KE TL: 75-78]

Karsten said there is a danger that the development of the adult education field could be used to fulfill some of these different objectives, specifically in the sense of accomplishing specific economic goals.

Karsten also said he has analyzed and written about the education voucher program offered in different states in Germany for continuing education:

Administrative people in charge [of] these programs, who offered these voucher programs, they decided [that] all people have to attend a guidance and counselling session before they can receive this voucher, looking [to see] if education via the voucher can have a biographical value. It sounds very nice at the first glance, but I analyzed it on the basis of transcripts of real, taped conversations within the counselling dialogues. . . . I’m calling it regulative guidance and counsel. It means somehow that you can really clearly see real practice, regulations, objectives of administration given to the guidance and
counsel office, [and they] have a clear effect on how the guidance counsel is implemented. You could even follow procedures or the rules given, for example, to the documentation, clear structures [of] how the guidance and counseling sessions are done. [KE TL: 85-94]

Karsten fears that core ideas of adult education are being left behind or used as some kind of ideology, or “some nice phrasing [that] makes you warm in the winter when you need it” [KE TL: 98]. However, adult education under this mentality could easily become an instrument of competing agendas and a “mixture of expectations” [KE TL: 100].

The next question asked each participant to describe his or her international experience in the field of adult education. Both participants described a number of different international experiences, primarily focusing on work done with international colleagues and attendance at international conferences. For Karsten, these included conference attendances, close professional relationships with colleagues in Canada and other countries, and connections with the Adult Education Research Conference (AERC). He said, “When I was in Canada in June, I took part in a symposium with a colleague in India, but I would generally say I’m very much inclined into exchanges with North American and European exchanges” [KE TL: 116-118]. Karsten spoke about working with a UNESCO scholar when he arrived in Berlin and learning about issues that seem similar to the issues of literacy that often permeates adult education agendas. He said these are important issues, of course, but they simply were not the areas of focus for his research. He also talked about private contacts with an Indian colleague who was working on something similar to an educator system in India: “So it is useful for [someone with a] German background with professionalization and teaching, but it is a
different stage of development. It’s a huge country. It’s got totally different situations and problems” [KE TL: 129-130].

Karsten also spoke of being interested in working with his students regarding developmental issues in other countries, but he said that this has led to a sense of skepticism in the process: “What can our contribution [be] for other countries, so-called underdeveloped [countries]? It is problematic. But I would say it’s a different context. And I have the impression that sometimes it’s better to stay out and to give to people their own development” [KE TL: 136-138]. He quoted the famous saying, “The way to hell is paved with good intentions,” then added,

Stay at home or visit us as a tourist but don’t come and try to . . . tell people how they should live their life [sic] or how they should organize it because they have no clue how their life [sic] is. I think there is a true point at least partly in this. [KE TL: 142-144]

Caroline, likewise, spoke extensively of her international experience in adult education. Besides having studied in both England and the United States, she had great contacts with colleagues from the European Association on Researchers of Adults (ESREA) conference, which was held recently in Berlin. She also stated that she had been involved with the European Association for the Education of Adults (EAEA), which is located in Brussels; as well as an upcoming English-language international conference on program planning to be held in Hanover. Additionally, she spoke of a specific ongoing research project on the benefits of lifelong learning. This is a study carried out in 10 European countries and funded by the European Commission. The study was comprised of nearly “8,500 questionnaires and 82 interviews. We discussed the benefits of explicitly liberal adult education in Europe” [CN TL: 119-121].
Finally, Caroline discussed in more detail her work with the German Volkshochschule, or the German Institute for Adult Education. As soon as she began to speak about this, I informed her that I had actually been a student at the Volkshochschule when I lived and taught in Dresden, Germany. She commented, “That you were a student in a German Volkshochschule helps a lot, I think” [CN TL: 135]. There are over 900 Volkshochschulen all over Germany, and they became independent institutions in the 1990s, then becoming part of the Leipnitz Research Institute. She added,

So that is where I work, and that’s really the only research institute that works at adult education from the point of view of educational studies really. It’s really supported by the discipline of adult education, and does support the discipline of adult education. [CN TL: 137-140]

The next question asked each participants to describe his or her personal concept of the term global leadership. Karsten related the construct back to a time when he and his colleagues from Canada, India, and Serbia were working on a global curriculum project:

This Serbian colleague, she was working for a German research institute that tried to define a kind of global curriculum, adult education on the global level. It’s called Curriculum GLOBALE and they made it even in different countries, Afghanistan or Somalia or different countries, even courses on how to teach this curriculum to people from different countries. . . . You can try to define some basic competencies or standards, but when you put it in quantitative terms, maybe 30-40%, which leaves maybe 30-40% on the special regional context to try to define the basic principles or basic ideas which are going. And you should leave room for some stuff which is really cultural specific and so on. [KE TL: 152-161]

Caroline answered this question by beginning with an acknowledgement that there is no real equivalent in the German language: “I think really Bildungsmanagement [educational management] might come closest to it, but Bildungsmanagement then
again more focuses on being the leader of an educational institution” [CN TL: 150-152].

She added,

If you ask me this question as someone who works and teaches in the field of adult education—I’ve also been working as a practitioner as well—so I would ask, what does leadership mean? It is to my mind—it is really important that you sort of train program planning processes within an institution, and that is really the way that we look at leadership when we talk about leadership. This is my opinion when you are talking about the view of adult education. [CN TL: 154-158]

Caroline continued, describing the complex German view of institutions and institutionalization processes:

It is important that you understand all the different and very complex relations between institutions that we have on the markets, and also the interrelation of adult education institutions with, let’s say initiatives, small associations, all kinds of social groups, that give themselves a kind of institutionalization of what people do in terms of education cultures. You really have to understand that there are a lot of institutions that relate to each other, and that program planning also takes place, and within that kind of complexity, and that you have to plan very carefully—that you have to know what the needs are. And we have to talk to colleagues because generally adult education institutions are, at least in the public sector, structured in a way where they do offer a range of subjects within. Institutions that are publically-funded, such as Volkshochschule, and other institutions that have public funds, such as those church-maintained institutions of adult education or institutions that are maintained by the unions. [CN TL: 160-170]

Referring specifically to the faith-based institutions of adult education in the country, Caroline said,

It’s organized very differently in Germany compared to the U.S., because there are subsidies and taxes that go from the state to the churches. And what they do with those funds is they maintain hospitals and so on. So there is a whole range of public adult education institutions which are all publically-funded, and Volkshochschule is the biggest one. [CN TL: 175-178]

At this point, Caroline presented the researcher a copy of the Volkshochschule program guide for the inner-city of Berlin. The only one I had seen before was for the entire city of Dresden, and this one was almost twice as thick. I also described a part of
the literature review for this study that focused on the idea of complexity in the global leadership literature and how she was describing a practical application of that construct in her conversation regarding the complexity of the German concept of institutionalization [researcher’s reflective journal]. Responding to this discussion, Caroline said,

That’s good. So that makes some sense to you. And really, leadership in adult education institutions is about getting this complexity right, and getting the finance right, and leaving enough space for the program to develop really. It’s not just figures really. If you do that, you’re going to kill young pedagogical impulse and that very balanced interrelation between demand and supply that we have in adult education. [CN TL: 184-188]

Caroline continued to discuss this idea of communicating well between all the processes associated with leadership in these various institutions. She spoke of needs analysis and analysis of trends, of the zeitgeist and an understanding of what kind of society we live in these days. She said there is a great debate raging on the issue of diversity in Germany right now: “Germany is still trying to get to a point where the country and society understand itself [sic]” [CN TL: 191-192]. Migration is increasing from other countries and the degree to which migrants attend courses at the Volkshochschule is increasing. While there is a lot of debate about how to attract more migrants, it is also important to keep in mind the balance required of all the factors and societal interwovenness . . . of the institution. And at the same time, you have to allow for the creativity that program planners have and their ideas of what they want to do and how they perceive the society and the world and the cultural developments and what they want to offer. [CN TL: 199-202]

As a result of the current problem of refugees in Germany and throughout the European Union, she emphasized the importance of maintaining a much bigger perspective when trying to understand questions of integration:
So you have to become in your actions more globalized . . . [or] at the very least open-minded, but keeping up some ethical standards, human rights, women’s rights, and so on. Diversity is a very important point, but it has to be framed by human rights. And that would be something that I would attribute to global leadership in relation to adult education. [CN TL: 206-210]

Caroline continued to discuss the positive perception which exists in Germany regarding the idea of institutionalization:

In Germany, . . . we really do have theories that look at the interrelation of programs from planning and institutionalization and societal developments, because we assume that these really do interrelate and that you really need strong support financially, and also support from the society in order to balance this, and that we do need institutions, and we do need institutionalization. [CN TL: 213-217]

Comparing these ideas to her experiences in the United States, Caroline said,

I found out that when I was in the U.S., when I talk about institutionalization—this is something to your point of cultural differences—people didn’t really think of institutionalization as something positive, but we do. We do think of institutionalization as positive because it allows for institutions like the Volkshochschulen, and they have not only a very broad offer, but also a broad educational idea, you know, being open to the public, being open to everyone. I mean, you (the United States) do have public libraries and that’s a good thing, too. You have community education programs, and these kind of things aren’t all that strong in Germany, but generally, we do believe that the state should give money and fund adult education and do it in a broad sense; and the term of institutionalization really sums that idea up. [CN TL: 219-227]

Regarding funding comparisons, she added,

There are complaints in the U.S. about funding and they always have to sort of go around and beg for money, and this is not a good thing. In Germany, it would be really strange if you had to do that. I mean really strange. It is more the idea that there are public tasks really that should be maintained, like for example adult education. [CN TL: 229-232]

The final issue Caroline discussed regarding the concept of leadership in general and adult education is the idea of arts education for adults. She spoke about the value that an institution such as the Hyde Park Art Institute in Chicago has to arts-based education in the region of Chicago, but trying to incorporate such a program like this in
over 90,000 offerings in Volkshochschulen in Germany would be unrealistic. While there may be a strong focus on art education right now in Germany, there is still the reality of what she calls “economization . . . so that everything becomes more market-driven and market-oriented” [CN TL: 246-247]. Art education may help people be more creative and fulfill their work tasks better, but it is a need to be addressed more carefully in the future. Her research with other colleagues in Germany showed clearly that (a) arts-based course offerings for everyday business professionals are increasing across the country, (b) arts-based course offerings for visual professionals are increasing, and (c) these courses correlate to greater fulfillment in students’ lives. She said, “I think it should still be possible to attend an adult education course that really doesn’t take you anywhere on purpose, just for the joy and for experiences and these kinds of things” [CN TL: 262-263].

Synopsis of the global leadership competencies. The material presented in the following three sections represent the three categories of Bird’s (2013) nested framework of global leadership competencies: (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen. Because each participant discussed the competencies in the order in which he or she rank ordered them, the data from Karsten will first be presented with regards to the category managing self, followed by the discussion of selected competencies of this category by Caroline. The same process will be repeated for each of the other two categories of Bird’s (2013) framework. A description of the closing questions will follow the presentation of data from these key questions regarding the global leadership competencies under inquiry.
Managing self. Before addressing the five individual competencies associated with this category, Karsten’s initial impressions indicated that these competencies do indeed run through all of the dimensions of the program: “I wouldn’t say we have a special module just for one of them, but I would say some of them; and of course, we didn’t shape our program in line or reflective of this one model” [KE TL: 166-167]. He perceives these elements as being more or less a reflection of teaching and the expectations of exceptional students. Likewise, referring to this category of managing self, Caroline said, “We don’t really talk so much about the personality in terms of managing yourself. It is more something that we do ‘between the lines’, for instance. It is more something that you get from the professors when you talk to them face-to-face” [CN TL: 291-293].

Caroline’s take on the competencies of managing self focused exclusively on character and global mindset. She insisted that this aspect of curriculum and program development is based primarily in terms of what the students bring to the classroom. The competencies are discussed in the course of teaching, on a more face-to-face basis between the faculty and the students. Although some of the domains may be addressed in the reading assignments that are brought into class, these competencies were not specifically identified in the curriculum.

Karsten agreed to an extent. The competency of inquisitiveness, for example, is represented by the students themselves and their drive to experience and discover new answers or new perspectives. Karsten admitted there may be some students who are in the program for less inquisitive reasons, such as simply requirements from their institution or organization. But for the most part, he believed this is an inherent
competency associated with the quality of the students entering the adult education program.

The competency of global mindset generated a lot of conversation. Karsten reiterated that he and his colleagues are continuously attempting to integrate global and international discussions throughout the teaching experience in the adult education program. He related this to the previous competency of inquisitiveness and discovering new ideas about how to view the world around us. He cautioned, however, that not all of the students are immediately open to this idea. He described the concept of the didactic principle, whereby there are different phases required when you want to learn something new, and this new meaning is translated from these connections between where the student is now and where he or she will be with the new knowledge or skill:

You have to relate to people where they are standing now to what they know right now, what their experiences [are] or their working context, and if you bring something new, yeah people have to connect it. If it’s totally alienating, somehow something new which I can’t relate to . . . it’s just academic if it doesn’t make any sense practically. [KE TL: 189-194]

Beyond the discussion of curriculum, Karsten also spoke of programmatic challenges associated with the idea of implementing the competency of global mindset. He described the changes that were occurring in Germany over the course of the last few years with regards to immigration and migration. One of the results of this kind of policy change was a re-focus on language courses in adult education institutions in Germany: “This has much to do with intercultural learning. But also, what is our concept of integration as a model of literature—is this integration, is this assimilation, is this multiculturalism—this whole big debate on it” [KE TL: 199-202]. In support of this focus, Karsten described a special module on Interculturalism from the cultural department.
He said the course is very popular with the students and includes “intercultural mission, intercultural values, [and] intercultural learning” [KE TL: 203].

In addition to this new focus from the institutional level, Karsten said that many of the students are looking to travel abroad, study abroad, or work abroad in order to gain a greater global experience from other countries: “So it’s again a dimension which is included [in the program], and especially in the last few years, it has accelerated” [KE TL: 207-208].

The final idea Karsten discussed within the competency of global mindset was a term he referred to as intersectionalism. He described intersectionalism as a cross-section look at issues such as discrimination and the role of race and gender, among other hot-button issues, which “can be seen as scandalous somehow” [KE TL: 211]. There have been long discussions with professors from multiple departments regarding the need to raise the awareness of these issues, including the struggle to decide which language should be used. Karsten said, “At the same time, you have a neo-traditionalist, conservative, to right-wing neo-fascist—I would frame it [as] so-called negative globalization” [KE TL: 214-216]. Many ideas surrounding all of this dialogue in the halls of GRCU is that there is a need to “shut down the walls and go back to some kind of mythological solidarity” [KE TL: 216-17]. The students, according to Karsten, are not always inclined to the idea of learning interculturalism:

It’s also a question of how do you deal with these global challenges. For example, what I’ve mentioned before with this global language or culturalism or a discussion about exclusive or inclusive, there are some students who are very inclined to it—for example, there was a student who was organizing an exchange program with Namibia in Africa—and I noticed that some other students were fed up with this, that it was somehow exhausting for them. [KE TL: 219224]
These students often have the mentality that because they are staying in Germany after graduation, then what is the role for this kind of global mindset in their individual lives?

Karsten said that it’s very different from student to student:

There are some students asking for having more literature from other continents or other languages, from other research traditions. At least some of them are looking for that because there is an organization of students and there was a group of five or six students who were looking for some different literature from Africa, from South America. [KE TL: 225-229]

The competency of flexibility is very challenging in the German system and culture. According to Karsten, “I have to confess somehow that it’s—that’s a challenge for the students. I don’t know if they are really looking for the opportunity to travel within the Bachelor or Master program.” [KE TL: 231-232]. He sees similar hesitancy on the national or European level as well because of very strict program requirements:

It has become very rigid as to which levels to visit, which credits you are receiving. You have to make an examination at the end. It is very different to the study programs when I was studying for example. We had more free choice. So I have to confess that the organization of study nowadays in Germany has become much more curriculum-oriented, much more structured and less flexible. [KE TL: 233-240]

He added,

The students are now complaining about a lack of flexibility for students. It’s related to the structure because I can understand it and I have to somehow to crunch all the structure and because you can make some free space and sometimes wish that it were more flexible. [KE TL: 240-243]

Karsten discussed the competency of character in terms of the ways in which ethics is incorporated into the both the curriculum of his courses and the program itself.

First, he mentioned the importance of ethical standards associated with research, so that it can be published and accepted into the greater field of adult education literature. Second, he discussed a three-step model from a leader in the field regarding program
planning. This includes a technical level, where the specific skills associated with design and evaluation are required; a socio-political level, where the relationships between all key stakeholders are understood throughout the planning process; and finally a third level, which deals with ethical goals and examples. Because program planning is such an integral focus of the adult education department as a whole, these ideas are constantly integrated throughout the teaching of the curriculum across multiple modules.

The final part of Karsten’s discussion regarding character and ethics involves what he calls enterprise-based training or vocational training: “This is, from my point of view, a key economic perspective, and then an educational perspective” [KE TL: 258]. He described the challenges his students have when doing internships or presenting final projects for an enterprise:

When they start to go into enterprise or maybe go into HRM departments and so on, they experience some challenges, some sort of challenge for them, and they are somehow taught very often from colleagues or heads of the departments the perception of the enterprise—that it’s all about economics. The training has to pay off. The training has to deliver for the enterprise, so the education for the staff or these issues, it’s all about money. And that’s a struggle for them. [KE TL: 260-265]

Karsten said the students often ask themselves why they majored in educational studies and learned about ethics when the real world is all about the money. Karsten even said that some students cynically encouraged him to get rid of discussions about ethics altogether. But he encourages them to stick to their learning, adding that it is always important to understand there is often no global interpretation regarding what the right decision is which one should make. He tells his students, “In the situation, you have to
decide how can you judge it, how can you decide what’s something you can do or you shouldn’t do. So I mean it’s a continuing issue” [KE TL: 270-272].

The final competency associated with managing self is resilience. Karsten focused his discussion of this competency on the importance of the mentoring program that exists in the adult education department. The decision regarding a student’s final project is a long process that takes into account all of the education and life experiences the student brings into the program with them. Karsten makes sure that the company involved is on board with the final project so that the bridge between what the student brings is tied directly with the outcome of the project. Expertise in other fields may also be taken into account, for example language training. Describing this process, Karsten rhetorically asked, “How can you really combine these sorts of issues in a biographic way and a content way which makes sense?” [KE TL: 284-285]. He said the professors in the program often deal with student frustration, lack of understanding, and their constant drive to understand what this process is all about and how they can actually use it in the real world. There are also students who struggle with certain aspects of prestige within specific disciplines. Students often return to enterprise-based training “where there’s a huge amount of business administration literature, economics literature, [or] adult education literature” [KE TL: 288-289]. Mentoring, according to Karsten, is a big issue, and he is constantly learning how to deal with it from different perspectives:

I’ll give some guidance and counseling regarding anxiety issues and how to deal with this stress. And maybe I also approach it myself—it’s like moving them out of their comfort zone and experiencing things by themselves. I’m not this kind of teacher who takes your hand and guides you and says you have to do it this way, or this way. I would say I’m just not that kind of charismatic guy which states this is what I would like you to do, to tell you which issues are important—no, you
have to do it. And if it helps to do some brainstorming, you have to start doing it.

[KE TL: 290-296]

Resilience, said Karsten, is learned from your experiences: “You have to go through some phases of struggling and of course you shouldn’t be totally left alone. We have a sense of obligation I perceive, but first they are going to do it and then we can talk about it” [KE TL: 297-299].

After discussing all five competencies associated with the category managing self, Karsten provided the following rank order: (1) character, (2) inquisitiveness, (3) resilience, (4) global mindset, and (5) flexibility. Flexibility, said Karsten, is often added on to some student experiences: “I would say [for] 20 to 30% [of the students], it’s a core element, it’s a core issue” [KE TL: 308-309]. Caroline reiterated that all of these competencies are really a byproduct of the interaction between the learners and the teaching, and the individual aspects of self that each learner brings into the program. Her rank order was (1) global mindset, (2) character, (3) inquisitiveness, (4) resilience, and (5) flexibility.

Managing people and relationships. Karsten began his discussion of the second category of Bird’s (2013) framework of nested global leadership competencies by immediately describing the institutional encouragement to value people and their thoughts, ideas, and opinions throughout the organization: “Everybody at some point has ideas, so please don’t undervalue people making and trying to keep or organize something” [KE TL: 317-319]. He said he tries to teach this idea throughout the framework of the adult education department. Taking this idea one step further, Karsten discussed a unique educational concept in Germany called Bildungsferne, meaning supporting an educationally disadvantaged population who may not understand or
perhaps respect the educational process—who may not be familiar with the learning process: “It’s like [an] uprising, people coming from a background where education wasn’t appreciated or valued very much. And I don’t like this discourse very much because it has some kind of stigmatizing [sic]” [KE TL: 323-325]. Karsten added that he always tries to use a needs assessment in order to understand what the values are of all student populations. He emphasized the need to be able to articulate and consider the images of people we all deal with on an individual level as well as how all student populations are affected by stereotyped information or public images or clichés: “So for me, it’s a basic principle with respect to teaching” [KE TL: 332].

Caroline had little to add about the competency of valuing people. She said this would definitely be competence, but that it seemed “like a psychological way of framing the teacher as a person, and we don’t really do that in the program” [CN TL: 340-341].

Karsten was eager to speak about the next competency, empowering others, because he felt it was closely related to his way of thinking. Relating this competency to the previous one, he said, “I know when you value people, you should also somehow empower them or give them free space to act” [KE TL: 336-337]. Another connection he immediately made was to the leadership issue of character:

I would feel uncomfortable with the idea of leadership that was connected solely to one person in the sense that leadership is about making some person who has the power and uses the power wisely and organizes everything. That’s an agenda where I would somehow feel very uncomfortable, because my understanding of somebody even in a leadership position is he or she offers some space, or structures, or influences, or stimulates an atmosphere or culture where people feel as if they have the possibility and chance to contribute, to make their own contribution, so to empower them. [KE TL: 338-344]

Karsten said in today’s world, he does not think it is suitable to maintain this old-school image of a charismatic leader at the top: “I’m pretty familiar with matrix
organizations. I do think there has to be some responsibility and some leadership people [who] can have some trickling down effects” [KE TL: 347-349]. Karsten said ideally, leadership is a mixture of traditional top-down leadership structure along with creating and offering a space where people have the power to act out: “I would see it as a top down and a bottom up development at the same time, and if leadership or the organization can create this atmosphere where both are happening at the same time, this is somehow my idea” [KE TL: 353-355].

Caroline related the competency of empowering others to the counseling program that exists for the students at the institution:

"We do have a counseling system, both for the institute for education, as well as specifically for our program. It’s good that you helped me talk about it, because all of these kinds of more personal things, the psychological things, may be addressed in the counseling. [CN TL: 443-445]"

Speaking more broadly about empowerment, Caroline said, “We don’t really use it in Germany, but we do use it in Europe” [CN TL: 455]. As an example, she mentioned a European Union project, funded by the European Commission, which worked specifically with practitioners entitled Empowerment, Development, and Outreach Involving Diversity. She said the goal of the project, which involved 17 institutions in 14 European countries, was to help bring migrants to the educational system. She said, “So, I think on the European level, you talk about empowerment. We don’t do it so much [at the university]. It would be more professionalization, something like that” [CN TL: 462-463].

The conversation with Karsten regarding the competency of cross-cultural communication began with a discussion surrounding the multicultural demographics of the student population in the adult education program. As a result of the access rules
for the institution, there are exchange programs that have brought in about 30 to 35 students from countries such as China, Poland, Ukraine, Czech Republic, Slovakia, and others. While dealing with national borders, Karsten also discussed the difficulties of accomplishing successful cross-cultural communication from within the border of Germany as well:

We have students coming from a Turkish migration background, of course—with the head scarfs you can somehow see it. So within the last fifteen years or so in Germany, we have this continuous expansion of access routes to university studies. [KE TL: 366-369]

He said when he began to study in 1994, about 20 to 25% of all people leaving school in Germany were going to study at university: “Now we are about 40%, and that is a rough estimate, so you can see it’s increasing participation at universities” [KE TL: 371-372]. In addition to culture, he described this as milieu-connected: “In general, our students have increased in diversity. It’s not nearly as homogeneous as it was before” [KE TL: 372-374].

Foreign language is not a requirement in the program. Although Karsten said he always tries to use work written in English, he does not teach in English. He also looks for literature from a global perspective, “but written English is some kind of lingua franca” [KE TL: 378]. He said he uses this language issue to stimulate conversation in the classroom. Additionally, many of the international students in the program, especially when they do research or projects in their home cultures, often use their native language. Study visits are another way of increasing cross-cultural communication. At the time of the interview, there was a visiting scholar from Denmark who, although he speaks German very well, communicates more comfortably in English. Although teaching in English is not really part of the plan for the program,
Karsten spoke about “some students, or at least some groups of students, [who] are very active and very eager to learn something in English or in other languages or from other backgrounds” [KE TL: 388-390]. However, this is not universal: “In others, when they see the case that I have some texts written in English or something else, they will ask ‘Is there no other possibility?’” [KE TL: 390-392].

Caroline’s comments regarding cross-cultural communication focused both on discussions that take place in the classroom, as well as the need to improve cross-cultural communication across the student population. She said, “Cross-culture communication and communication skills, or communication in the classroom in general—that is something we do in this course on micro-didactics” [CN TL: 425-427]. She also discussed the multicultural make-up of the classes:

The make-up of the class is multi-cultural, but not as much as it could be. As I said before, we are really trying to actually open up education institutions to all kinds of communities. And what I mean by open up is that institutions are of course open. Everyone is entitled to go there. It’s not that people are not really prevented from going. It’s more that there are barriers that lie within the circumstances that prevents them from [attending]. [CN TL: 429-433]

She said the barriers were not so much institutional, but rather a stronger sense of communication needed to take place:

It [a recent study] came up that migrants find that it’s very important that the staff are really in the know, taking them through the course calendar, telling them look at this [emphasis added], this could be interesting for you, that kind of thing. These kinds of things should happen more, this kind of counseling, or, I don’t know, talking to each other, those kinds of things. And I think this is true for university higher education. But it’s improving. It’s improving, but still a way to go. [CN TL: 434-439]

With regards to the competency of interpersonal skills, Karsten spoke of how much more interesting this concept is becoming in Germany. He has a colleague who teaches and works within the idea of emotions in the learning process: “She is very
much inclined to doing research on the role of emotions for learning and she is still teaching in the program, also doing research on the role of negative emotions” [KE TL: 405-407]. Learning, said Karsten, “is connected to the emotions you feel with your other students, your siblings, the background when you are coming to learn in adult education” [KE TL: 409-411]. He often teaches one module which is an analysis of learning situations, using material from another colleague in Germany who makes videos out of real-life learning situations. He said they put these videos on the internet so that it can be accessed as a kind of teaching material:

So I let the students make an analysis of these learning situations, and of course you can see very well that it is a relationship between a teacher somehow and the learners. And it’s interesting to see from the students how they relate to what they are seeing on the video screen, especially at the beginning of the course. I just let them see the video and just let them comment, without any knowledge, without any introduction, yeah somehow going out of the comfort zone, just doing it without any idea what I want to do, what to hear somehow because when you are starting to get those structures across the framework. [KE TL: 414-421]

Karsten continued, explaining that at the beginning of this exercise, he often hears students talk about how poorly the teacher is doing and giving a mostly critical explanation of the teaching. However, because they do not yet have the vocabulary or knowledge to articulate this critical analysis correctly, their reviews are not very solid:

“It’s partly connected to some prior image in their minds regarding teaching” [KE TL: 425]. Through the course, the students grow their understanding of specific psychological structures taking place in the classroom and they become better able to articulate these interpersonal skills.

Caroline also addressed the competency of interpersonal skills, saying, It’s more about what you really need to know about clients or learners, what you need to know about how the program relates to the environment, what you need to know about institutionalization of programs, what you need to know about
This would be these kind of interpersonal skills, and in that sense, we do talk about interpersonal skills. [CN TL: 345-349]

However, Caroline emphasized that the discussions of this competency is not so much how do you as a person have to develop in order to be a good teacher. It’s just not the approach of the program. I don’t think that it’s really the approach of any of the other programs in the country. It’s really more about what do you need to know when you want to plan, what do you need to know when teaching class, what you need when you are talking to politicians about your field and how to get funding and so on. Yeah, it’s basically more about what you need to know. [CN TL: 349-355]

Caroline said the instructors in the program do not speak so much about leadership, but rather on management and managing an institution. She went into detail about the research of a colleague who came up with a theory of how different processes of institutionalization emerge with regards to Bildungsmanagement (the management of educational institutions) and program planning within an institution. Caroline said that this kind of “theory building” [CN TL: 367] goes into the direction of interpersonal skills when it comes to really expressing what the program is like. Explaining what the program really means and how the single offering or bundling of offers is something that is taught in the graduate classroom.

Caroline added, “Nowadays in the program, we have more this space for transfer as well” [CN TL: 378]. She described again the micro-didactic planning course, which means the instruction of teaching methodology and settings:

We do distinguish between micro-didactics, which is what is going on in the classroom, and macro-didactics, which means program planning. This is maybe a German thing as well. It’s not only at this institution, but that is something that is shared among professors of adult education in this country. [CM: TL 380-384]

Providing an example of a learning outcome associated with the micro-didactic module, she said,
We do have two weeks at the end of the semester where they [the students] do their own concept for, I don’t know, an hour of classwork or a day or whatever, where they include all of what they’ve learned in terms of not only didactic principles, but also about, for instance, social dynamics that can go in the classroom. So we collect all the information that we have from research and theory-building in this respect. So we read it, we discuss it. And in the end, they should be able to do their own concept for one-on-one teaching or one day or whatever, one course, and include this information that they gathered over the semester into this concept. [CN TL: 385-392]

The final competency associated with the category managing people and relationships is teaming skills. Just as so many other participants in this research study have expressed, Karsten commented, “Well, some hate it and some love it” [KE TL: 434]. He said he tries to incorporate group work continuously in the teaching of the modules, so it is really a question of the individual’s preference. Regarding one exercise, he explained:

We have sometimes these free writing problems. People are there doing teams and doing less work within it. So some still like it. It is becoming in more general terms more popular to do it in Germany I would say overall—we have been starting already in school—this teamwork. And of course when something is increasing, sometimes also it’s misused: “Oh yeah, let’s do teamwork, let’s do it together. It’s better. It’s more effective. It’s participatory.” It is sometimes too much used. I can imagine it especially in online course. [KE TL: 435-440]

Similarly, Caroline incorporates teaming and group activities into her coursework. She said,

They do it all the time. That’s something I ask them to do, because I think it’s fruitful really. They really benefit from it. I don’t like those conversations where everyone says bits and pieces and doesn’t really relate to the next person. [CN TL: 411-413]

She explained that although the primary way in Germany for students to prove they did their own work is through presentations, the group conversations that take place are an opportunity for the students to get as much as possible from the text or the material provided in the class. Caroline likes for the conversations to be structured, however,
adding that she does not really encourage “these kind of free conversations” [CN TL: 419]. She explained further,

But if I ask them to really go through the material and identify the key points of it, and discuss those key points, and then present the result of their discussion to their fellow students, I think they always come out with fascinating results. So I mean, they are used to working in teams. [CN TL: 419-422]

After discussing all five competencies associated with this category, Karsten provided the following rank order: (1) valuing people, (2) empowering others, (3) interpersonal skills, (4) cross-cultural communications, and (5) teaming skills. In comparison, Caroline’s rank order was (1) interpersonal skills, (2) empowering others, (3) teaming skills, (4) cross-cultural communications, and (5) valuing people.

Business and organizational acumen. Karsten began his discussion of the third category of Bird’s (2013) framework of nested global leadership competencies by stating the importance of vision and strategic thinking. He said this competency is especially important when teaching program planning:

They have to learn some techniques, they have to learn some basics, some kind of modules, some knowledge about how is it organized. So, somehow to put it bluntly, so that they can adapt to the departments that they might want to work in. [KE TL: 453-455]

However, Karsten went on to ask about additional dimensions that differentiate adult education programs: “What is adult education about if they are doing program planning or working in an HRM department and so on? What would you consider as your own contribution coming from an academic background or a background in adult education?” [KE TL: 458-461]. While it is important for students to learn how to adapt to a given situation, they also need the visioning skills in order to get started:

I would consider it important in teaching or discussing program planning. I don’t want to teach them how to be just the best adaptable people, they should be
singled on issues where they can create a change in the labor environment or labor conditions, working conditions. So I would say it’s essential and it’s also a part on the pragmatic phase. [KE TL: 464-467]

Describing these pragmatic issues, he continued:

Strategic thinkers, for many working conditions of adult educators in Germany, are very essential because in our work, there is structure. If you are working in an enterprise or if you are working in a voluntary organization . . . you have to secure the future of your organization . . . by extra funding, finding people to support it, finding people to attend courses, learners willing or able to pay for it, or public or private funders to finance it. [KE TL: 468-471]

Karsten believes strategic thinking is important in the sense of knowing where the field of practice can be funded: “We have to find some money for this, so where will I receive some money for it. Because it’s nice to have ideas but if you don’t get any funding by anybody, it affects your work somehow” [KE TL: 474-476].

The discussion regarding the competency of leading change began with techniques to assess change that occurs in the students during the course of completing the adult education program. Karsten said in principle that it is the responsibility of the professors to observe the students and to get an impression of where they begin and where they are headed. It depends on how much you see the students and how often you see them in the courses you teach. Regarding designated programmatic reviews, he said, “I wouldn’t say that we are making a continuous record or assessment for all students. This is not possible. It’s just an impression of different students you have” [KE TL: 482-484]. There are, however, exchanges that occur with the colleagues in the department:

We have quite often discussions with each other, some impressions or some exams which we have to do jointly where we can also get an impression. So that’s an issue of continuous reflection and then discussing [with the] students themselves when they finish their studies, for example an assessment of their final work. [KE TL: 485-488]
Often, Karsten is quite skeptical at the beginning of a student’s academic career, yet through the course of the program, he can see that they have changed and developed a lot. On the other hand, he admitted there is also the situation where some students have not achieved as much as he would have expected. He may ask himself if he did not see signs that this student might have needed support. When this happens, he understands it is a question of teaching methods in the program.

Karsten added one final thought about the competency leading change. He said very often students come in from organizational backgrounds, or perhaps they are doing their thesis in collaboration with a specific organization, and sometimes the organizations themselves report back to him that they can see change taking place in their perspectives of the student. Karsten said he loves it when this occurs because it is a different way of assessing change: “The changes of the student, for sure, but also change because they are doing their work in something that’s being practiced outside” [KE TL: 502-504].

Regarding the competency of business savvy, Karsten admitted that a lot of students would probably say they have not received enough knowledge in this area of interest. He mentioned specific skills such as accounting, financing, and planning as areas where the program simply does not address the business side of entrepreneurship. He added,

Of course, I would say this could be or should be the idea of a major subject. We don’t do it because of resources. It’s also a question of teaching capabilities, because I know a lot of people working in organizations and it seems there’s a lot of context difference. [KE TL: 509-512]
Another issue that would provide challenges to teaching courses associated with business savvy is the speed at which many of these courses would change:

So I would see, for example, doing a course in accounting—I think it would change rapidly. There is also the question of which competency level should you obtain at the university level. This is still something you can learn rather rapidly when you are working. [KE TL: 513-516]

On a positive note, Karsten said that he often invites practitioners into the courses. He is attempting to bring graduates of the program back in order to address contemporary issues occurring in the workforce, but unfortunately “it’s really partly disappointing because the participation of students from our program is so not high, it’s not as high as I would’ve expected” [KE TL: 521-522].

Regarding the competency of organizational savvy, Karsten said that he would simply try to talk to the students about organizational skills: “These ideas of organization theory and organizational literature, at least give them some kind of a representative organization, or a typical organization” [KE TL: 530-532]. He said he would rather perceive the competency of organizational savvy from published studies, since so many organizations are so very different:

When you start to work in an organization, you have to start to try to understand how the organization is working, who are the people in the background, who are the important people, what are the official and what are the hidden rules, and how people act within their roles they have in organizations. [KE TL: 533-536]

Karsten provided an example of trying to give the students an image of a very hierarchical structure, such as a professor, which is a position that a variety of people can fulfill:

So I try to teach the students don’t stick totally to the assumption or the images or the prejudices. For example, try to experience, try to improve your reading skills, to challenge your own assumptions and experiences and to reflect on and to learn to talk with other people about their experiences. I think for me it’s the
most elementary skill when you are working in an organization. You have to understand how it works, how it moves, in what context does it move, and how can you trust people, who you shouldn't trust or who you're more comfortable with. [KE TL: 540-546]

For the final competency under inquiry, managing communities, Karsten said the students have a lot of opportunities for networking and building ties to strengthen their connection to the field of adult education. It begins with the students themselves as a result of the variety of backgrounds from which they come: “They have some possibility to see this. When I know about it and when it relates to the course content, I try to stimulate this discussion and these kind of exchanges” [KE TL: 551-553]. However, Karsten still returned to the idea of inviting practitioners from the outside:

For one class, I invited somebody who was working in the Volkshochschule on a program planning level. And I invited somebody from a big car manufacturing enterprise in Germany. So you would somehow expect two totally different contexts and environment and program plan. It’s a totally different context. And it was very interesting that both of the speakers invited mentioned how surprised they were about how similar their work was in many respects. [KE TL: 554-559]

One example of the similarities is something Karsten called unsafe budgeting: “Some were for political reasons, others were for economic reasons, or micro-politics, but they both talked about how things change often within a half year, and so this is an example of networking taking place” [KE TL: 559-561].

Networking is also facilitated as a result of the variety in which the field of adult education in Germany finds itself. According to Karsten, it’s not only an educational discipline, but research in adult education focuses on concepts such as economics, studies from psychology, cultural studies, and many regional contexts where you can see different approaches toward the entire field:

You have a chance to get some in-depth results or you can see different perspectives. So at least on the knowledge level, there is a high awareness of
the importance of networking—part of your work in adult education is building networks, different networks. And with real people, practitioners coming to the course, there is a kind of stimulation. [KE TL: 565-569]

Before Caroline began to discuss her views regarding this category of Bird’s (2013) framework, she began to draw a diagram of the modules that students take within the adult education program which connect the micro- and macro-related ideas. Addressing competencies associated with the category of business and organizational acumen take place within the module on macro-didactics. Using the diagram, she compared the macro-didactics course (Module 7) with the micro-didactics course (Module 5), where the other categories of Bird’s (2013) framework are better addressed. While those competencies are covered in conjunction with conversations with professors, research assistants, and personal counseling, as well as classes on emotions and emotionality in adult education decisions and learning processes and a range of classes on educational counseling, she pointed to the diagram she created on the spot and said, “This tells you that we really have a strong purpose and emphasis on that part of the professional competencies, because we do a lot of research and this would be program planning, management, educational institutions, and evaluations” [CN TL: 475-477].

Caroline admitted that there is not a strong focus on business savvy, but “organizational savvy in combination with program planning, that brings us back to the beginning of the interview” [CN TL: 487-488]. She advised to review Module 4 (Learners and Needs) and Module 6 (Counseling Competency) in detail as well to cover some of the competencies associated with Bird’s (2013) framework. Finally, regarding the teaching of an entrepreneurial spirit, Caroline said,
Not so much, but I think we should maybe. The interview is also making me think, of course, about what we are doing. I mean, there could be something that really—quite more in the direction of this managing self [category], and developing an entrepreneurial spirit, and so on. I mean, why not? It could be helpful. [CN TL: 499-502]

Asked if there was anything missing from the discussion thus far, both Karsten and Caroline said that the framework was quite comprehensive. Karsten said only that he questions how this framework of competencies can be related to specific content-related material. For example, if there is a discussion about environmental issues, how can these competencies relate to goals and sustainability? He said that he dislikes the idea of management literature in general because most of it is not content-specific: “I dislike it. It doesn’t depend if you are managing a hospital, a car manufacturing, or a wagon producing company. It’s all the same—it’s just managing” [KE TL: 579-581]. He emphasized that the content of the discussion is very specific. He asked, “What are your objectives? What are you dealing with? How can you apply this model? What is the framework?” [KE TL: 582-583]. Describing the competency of character, for example, he feels uncomfortable relating character only to the category of managing self,

because character is also, of course, here related to cross-cultural communication. What is our assumption how we want to live? What are the norms or the ethics of our society what you want to strive, like issues of solidarity and so on—global solidarity or solidarity within the society? [KE TL: 586-590]

He continued,

If you’re just staying with the headings of the competencies, the character is something related to the individual, and I think that character is also associated no more with just norms and so on, but it’s related to situations. // So, I would consider also the issue of relating it to a wider scale or to a level beyond the organizations. [KE TL: 590-597]
Caroline added only that she wanted to bring my attention to “this idea of institutionalization and how it matters to the program and to what we’re doing here” [CN TL: 506-507]. She also emphasized that in Germany, there is more of a focus on qualification-oriented training as opposed to a psychological focus:

There is a vast body of literature emerging right now that is more about—not so much emotional intelligence, because that would be something you could look at from a scientific point of view—but more about motivational literature in the field. [CN TL: 509-512]

Motivation, Caroline said, is something that can be addressed in research and theory as well:

There is just this kind of literature that really motivates you as the trainer yourself, which is more self-entrepreneurial and that kind of thing. That is something where we have a growing body of literature, but we don’t include this kind of literature in our program. As I already mentioned, it is more theory-based classes on emotions and emotionality in adult education decisions and learning processes, on differentiated patterns of emotionality, on educational counseling as a part of the adult education system and in terms of counseling techniques and so forth. [CN TL: 516-522]

The final question asked each participant to describe what was missing between where the adult education program is now and the ideal they envisioned when all things are exactly as they wished it could be. With laughter, Karsten said that money was definitely the first answer: “What can I do with the resources? How can I achieve the best results with the resources I have?” [KE TL: 601-602]. He said it is fun to imagine a perfect world with all the resources needed, but that’s not the case. With regards to bridging the gap, this thought exercise generated ideas such as having more space, more chances to get the students to learn more things, to have more conversations, to have more possibility from the students’ starting points and how they perceive their knowledge: “We are trying to teach them, we are trying to structure things for them” [KE
He also said more time was necessary to do all of this, as well as to encourage students to have a greater connection to the context.

Karsten said that an instrumental change he made in the structure of the program was to create a better societal climate. He compared this more open climate to the time when he was a student where he just went to learn the content. Areas such as inquisitiveness and enlarging the space for greater understanding has created a more experimental atmosphere “where I’m a familiar face, where the students are familiar faces, because I’m only one person. When you make a mistake, someone notices” [KE TL: 612-614]. He admitted that he is often just one step ahead of the student because “I’m always looking for ways to explore more and to take it further, to have some collective learning or collective experience” [KE TL: 615-615].

Caroline was much more emphatic about which competencies to add to the existing adult education programs:

There has to be empirical research. It’s important. We can’t just stick to non-scientific literature that exists in the field. Even more, I think we need more empirical findings about how the adult students feel and how they perceive themselves. There is some literature, but not as much as there could be. And if there was a great volume of literature, this would be easier to really include and cover in the programs. [CN TL: 526-530]

She added, “And of course, there just isn’t enough time to go over all of these things that you would like to. I mean, there may be other programs who focus on these basics” [CN TL: 532-533]. She concluded with the idea that she does not believe every program in the country need to be everything. The emphasis of the program at GRCU is on the area of program planning, which other programs in the country do not have. Other programs may focus on the learning process itself, or on the self-perception of the professional. She concluded,
I really think it depends on where your focus lies and what you do research-wise. I think one is better able to teach in the fields that one does research in. It appears that you are really very close and looking at the scientific ways in those areas where you are teaching as well, if that makes sense. [CN TL: 539-542]

**Case 6: Irish Fast-growing University (IFGU).** One quote that provided insight into this case was:

I do think traveling between local and global is also crucial. I think it’s important for social reasons. It think it is important for good learning. I think it is important for a shared future on this little piece of rock. [FC TL: 204-207]

**Overview of Case 6.** Irish Fast-growing University (IFGU) [pseudonym] is a young university, though internationally-recognized for the quality and value of its research and scholarship. A member institution in the National University of Ireland (NUI), IFGU is a modern institution, dynamic, rapidly-growing, research-led and engaged, yet grounded in historic academic strengths and scholarly traditions.

IFGU comprises over 9,000 students and 800 staff from more than 20 countries. The university's most recent *Strategic Plan 2012-17* charts a clear and ambitious direction for the development of the university, including major enhancements in undergraduate and postgraduate education, focused investment in research, further internationalization, and deeper engagement with enterprise and the community.

For the purposes of this study, IFGU offers the following degrees in Adult and Community Education: a Higher Diploma in Further Education, a Master of Education (M.Ed.) in Adult and Community Education, a Master of Arts (M.A.) in Community Education Equality and Social Activism, an M.Ed. in Adult Guidance and Counseling, and a Postgraduate Diploma in Arts (Adult Guidance and Counseling). The M.Ed. in Adult and Community Education is particularly suited to students who are seeking ways of understanding the connections between theoretical frameworks and the assumptions
that underpin their work practices. This program provides the opportunity for students to critically reflect on their experience in the field, develop the public debate on social justice and critical citizenship, and have a thorough grounding and an understanding of the background to and influences on research in adult and community education.

**Participants for Case 6.** Two faculty members were interviewed for this case. The first was Dr. Johanna Taggert. Johanna is an extensively published Lecturer whose research interests include critical pedagogy, gender, community, and group work.

The second participant for this case was Dr. Frederic Croizer. Frederic is also a highly respected Lecturer whose research interests include social class and education, access and student retention in higher education, critical realism, critical theory and critical pedagogy, non-traditional student experience in higher education, and the history of radical adult education and the role of education in progressive social movements, among many others. See Table 13 for an overview of the demographic information for the participants of Case 6. The interviews took place on successive days via Skype.

Table 13

**Demographics for Case 6 Participants**

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<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
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<tr>
<td>Dr. Johanna Taggert</td>
<td>Female</td>
<td>Ph.D.</td>
<td>30</td>
<td>Lecturer</td>
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<tr>
<td>Dr. Frederic Croizer</td>
<td>Male</td>
<td>Ph.D.</td>
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<td>Lecturer</td>
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Synopsis of the opening interview questions. The first interview question asked each participant to discuss a positive experience in the adult education graduate program at IFGU. Johanna began by stating that all her standout moments as a faculty member in adult education have been with the students. She said it is the development of the relationship between herself and the students that occur, often outside the classroom, that stand the test of time: “I meet people that I might have missed 30 years ago. They mean as much to me as my current students. I think that actually is the most wonderful thing about adult education, that it’s incredibly meaningful to everybody” [JT TL: 14-17].

Frederic’s response to the first question focused on his students as well. He described the experience that often occurs in the classroom “in which I see students really taking ownership over learning and knowledge. A type of critical engagement and participation which is a sign of a particularly healthy group” [FC TL: 16-18]. He said this often takes place towards the end of a semester or at the end of the year after quite a lot of group building, reading, and writing where he sees the students take over:

It could be a presentation. It could be—I mean, one of our graduate courses, we really encourage them to do a range of things, everything from inviting guest speakers into the classroom to doing a walking tour of the campus, or a sort of critical dialogical picnic—those types of things in which people’s full range of capacities and passion come in. [FC TL: 23-27]

The second question asked each professor to discuss their views regarding the future of the field of adult education. Johanna explained a three-layered vision she sees in the field right now: “First there is a grass root layer that is just vibrant and strong and powerful” [JT TL: 25-26]. Then there is a middle layer,

that really has been sort of sputtered by the powers that be, especially the economists, who really do see it as just the roots to employment. In fact, [they
Finally, there is a third layer. Johanna explained, “These are the people who are kind of in the sight of struggle, they really are trying to sort of reclaim adult education for what it ought to be. And I have really such high hope in that layer” [JT TL: 31-33]. The middle layer, Johanna believes, can be regained “because of the strength of the top and the bottom layers” [JT TL: 33-34].

Frederic, likewise, expressed a positive outlook. He said,

Like a lot of people in adult education, I did not come through academia through a direct route. I had been a practitioner, as a community educator working at intercity context for quite a number of years. So my passion for seeking the scholarship, and the passion is the thing that keeps me in it. If I thought that this is just another job, I wouldn’t be that interested. So yeah, of course I have hope. [FC TL: 31-35]

The next question asked each professor to provide examples of international experience in the field of adult education. Johanna’s response focused on her initial impressions of the word leadership and how it is used in an international setting, especially within the context of the field of adult education. She considers the construct of leadership to be “very gendered, classed, raced, and business-orientated; and that there is a real implication that there is some charismatic leaders and then the rest of us are dumb passive slouches. So I am very suspicious of the word leadership. [JT TL: 39-42]. She provided two examples of international leadership of which she has been a part, beginning with her role in the Popular Education Network (PEN): “That is completely global—that is, we have people from other continents. // The leadership really is shared leadership. [JT TL: 47-51]. Another example Johanna discussed was her role in the European Association for the Education of Adults (EAEA):
That was more formal. People elected us into the president’s role and to the different roles, like vice-presidents and so on. But because we were all adult educators, there was this more facilitative way of doing things. All our meetings were held around tables and we all had something to do at these meetings and so on. [JT TL: 54-57]

Johanna said, “I do think that the underlying principle of this adult education, this quest for a type of new organization in our lives—and the way we manage to do that is to share the leadership” [JT TL: 58-59]. She concluded that it was important not to see the ego as leading the way, but rather to understand that we are all in this journey together. She added, “And we have a big job to do” [JT TL: 60-61].

Frederic’s response began with a clarification of how the question should be framed. His understanding is that the best parts of adult education as an academic discipline have always included local, national, and international aspects: “There’s always been ideas and experiences and practices in crossing boundaries and borders” [FC TL: 49-50]. More specifically, he indicated that the practitioners he speaks and works with in the field of adult education are certainly international. He said he has been involved in a lot of international research and is involved in a lot of international networks. Leaders in the field, or at least helping to shape the field, are drawn from all over the world, not least of all North America, “which has had a peculiar influence on Irish adult education” [FC TL: 56].

In addition to the practitioners are the students and educators who make up adult education: “And certainly, inevitably, we live in an intercultural global world” [FC TL: 62]. Frederic said that much of the work he did before entering academia was done in an inner city context working with migrant communities and working class communities.
This melding of international context with the field of adult education is “an organic part of how I understand it” [FC TL: 66].

Regarding their impressions of the term global leadership, each professor provided unique points of view. For Johanna, she began with an incredibly positive sense of connection to the construct: “First of all, the word global, I think, is so wonderful. I do think that we have to see ourselves on the small cloud” [JT TL: 63-64]. She believes that there is a lot of common, shared interest in “keeping this planet going. So I do think talking across cultures and space and things like that are very important” [JT TL: 64-65]. However, she also believes that there are many forces trying to break up the common ground. She talked about the refugee crisis in Syria and how painful it is to think of what they are going through right now. Yet, she also talked about the beauty of being able to be in social media contact with people in Cairo during the Arab Spring and the “amazing potential” [JT TL: 69] that time demonstrated.

Global leadership, according to Johanna, “is a way of combining those [shared] interests, especially against the forces that are really trying to break it up—to see us in competition with one another or in different stages of development” [JT TL: 72-74].

Regarding the perception of developing nations, she added,

You know that is one of the things that really pisses me off very strongly is the idea that people whose economies are pretty poor after colonization and ravaging and everything like that, that there is a kind of a sense that they are not quite as human as we are in the West because they are only a developing nation. All of us humans are on the same—we may have different problems that we face in our societies. [JT TL: 74-78]

Frederic said he was happy with the word global, but less comfortable with the term leadership. He said the vast literature on leadership coming primarily from North America has taken a foothold in adult education. He said it is a term that is quite often
used in compulsory education, especially for people moving into management positions in schools, but it is less commonly used by adult educators. The reason for this, according to Frederic, comes from political and historical roots. He did not deny that leadership exists, and adult education certainly has a role to play in “fostering types of leadership in the community and educational settings, but there is a version of leadership that I encountered amongst colleagues in North America which sounds to me very much like management speak” [FC TL: 84-86].

Frederic also said those in the field of adult education can avoid some of the trickier questions about power and participation which go right to the heart of adult education. He asked, “What is it to build a general capacity for leadership? What is it to build grassroots democracy? What type of leadership is required?” [FC TL: 89-97]. These are relevant questions to ask, rather than “What are the qualities or characteristics of a given person, like an individual, who is deemed the leader?” [FC TL: 91-92]. This approach to leadership scholarship makes him feel a little bit uncomfortable.

Frederick then provided a unique example of global leadership taking place in the world today that is worth reflection:

You know this very interesting group of revolutionaries in Mexico called the Zapatistas, who have a whole theory of leadership based on obedience—by which they mean you learn by listening. You learn by listening and you can only lead by listening. So, rather than the Robinson Crusoe fantasy about the individual risk taker who builds this little fortress, who leads the way to his man Friday, I'm much more interested in averting that and saying, “Well, what is it that adult educators can do in and outside of classroom to build more egalitarian, participatory, democratic, selfless spaces?” [FC TL: 95-102]

**Synopsis of the global leadership competencies.** The material presented in the following three sections represent the three categories of Bird’s (2013) nested
framework of global leadership competencies: (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen. Because the interview with Johanna took place first, the order presented in this section follows the order in which she discussed each competency within each of the three categories. Discussions of each competency are presented individually with Johanna’s comments proceeding Frederic's comments. The same process will be repeated for each category of Bird’s (2013) framework. A final section of the closing questions will follow the presentation of data from the key questions regarding the global leadership competencies under inquiry.

**Managing self.** Johanna began her discussion of the five competencies associated with managing self by describing the importance of ethics and respect. The competency of character ranked as her foremost construct with regards to Bird’s (2013) framework. Johanna talked about the focus on research within most programs at the university and that the “number one attribute that we need for that in terms of the personal disposition really is ethics” [JT TL: 82-83]. Continuing to talk about the importance of good research, she said the students “really have to sort of watch themselves that they don’t try to do something that’s underhand or try to take advantage of someone else or exploit someone else” [JT TL: 84-85]. She said one of the things discussed in the adult education program is the avoidance of “smash and grab research . . . where elite people go in to grab the knowledge of marginal people and scurry back to the university and sell the knowledge around the place” [JT TL: 86-88]. The moral compass must remain high, and yet it is sometimes hard to separate that idea from the kind of morality that is preached in religion: “Ireland is a very Catholic country, so we
really have to kind of separate our own personal ethics from the discourses around what is moral behavior” [JT TL: 91-92].

Before Frederic began to discuss any of the competencies, he wanted to make sure that the terms were translated properly “across our little sphere of adult education” [FC TL: 113]. He admitted that he was “less vested in the language of competency, standards, [and] professionalization than maybe other educators; and as you can see here, I have a certain kind of political analysis of what good leadership is” [FC TL: 115-118]. Frederic sincerely wanted to understand exactly what I was asking him to provide before the key questions were addressed in the interview. He was adamant that I clarify the intentions of the questions—in other words, to tell him what kind of data I was looking for. Admittedly, I felt momentarily insecure by the questions, as I reiterated that this interview was semi-structured and allowed for the direction of inquiry to flow in multiple directions. I had the feeling he was not too happy with this response [researcher’s reflective journal], but he pressed forward and said, “I’m just going to go through them, make very brief comments, and then see if it is working for you” [FC TL: 140-141]. The insecurity I had felt quickly dissipated as we began the discussions of the individual competencies, and I believe that allowing for a more free-flowing exchange of ideas generated great data points in the end [researcher’s reflective journal].

With regards to the competency of character, Frederic offered once again his reservations that leadership should be seen primarily through the lens of certain characteristics of certain individuals. He said, “I think of it [leadership] as inter-subjective qualities. I think it depends on care and it depends on openness, quality
rather than the particular characteristics of an individual” [FC TL: 176-178]. Ideas and words such as concern, care, love, and solidarity all play a part in leadership. Mirroring Johanna’s comments about the importance of ethics, Frederic said, “I think there’s a very clear and endlessly negotiated ethical balance” [FC TL: 179-180].

The next competency Johanna discussed was inquisitiveness. She reiterated the need for solid research in adult education graduate programs:

People have to be really passionate about that. They want to find out more. It’s not just about confirming what they already know. They really have to go out to find out new stuff and to be really sort of open to what comes up, even if it challenges their fundamental beliefs in very profound ways. [JT TL: 95-98]

Frederic had very similar opinions about the competency of inquisitiveness. He said this “sense of curiosity and openness [is] fundamental to all adult education—absolutely crucial” [FC TL: 145-146]. He added that part of our jobs as educators is “to stimulate, enlarge, encourage, complexify [sic] that sense of curiosity about the world, to find the sense of interconnection and difference in the world, see things in their full complexity, and how to use that curiosity to change things” [FC TL: 146-149]. Ultimately, Frederic believed that inquisitiveness is most central in day-to-day work . . . or at least a sense of curiosity. I think it is actually fundamental; not just fundamental to education, it’s fundamental to life. It’s a sort of growing outwards. It doesn’t matter if you’re reading John Dewey or you are reading Paolo Freire or you are watching the constrictions and opening and the breaks and the discoveries of educational work, what you are looking for is the care for that and to help shape that in a really powerful way. [FC TL: 194-200]

Johanna was able to provide an immediate, recent example of the next competency, resilience. She described the difficult conversation recently with one of the students in the program who was told that she was not going to be able to submit her thesis because it just was not good enough yet. She said, “And what we had to do was
to stay with her, to say all this means is that you are just not ready now. It doesn’t mean
that you don’t have time to work on this” [JT TL: 103-104]. Johanna said resilience is
what this student needed, because it can be so easy for a student to walk away from
that news with a sense of total failure—to think that she was stupid. She took time to
work through these feelings with the student, to talk about the improvements to be
made, and how to focus on the positive aspects of what needed to be done. Johanna
continued, “I suppose it underpins another word that is used, which is confidence—you
know, self-confidence” [JT TL: 109-110]. She said that so much of the discussion in
today’s culture comes from the outside world, though she spends the necessary energy
with her students helping them to see that it really comes from within, “their insight into
themselves [and] the way that they know themselves in the world. And that confidence
is really almost like a little flame burning inside and sometimes it waivers, but
sometimes it just glows” [JT TL: 111-113]. That insight really carries the students on
towards becoming more resilient while also being more curious about the rest of the
world and their place within the world. Johanna added, “A little knock back isn’t the end
of the world. That’s for sure” [JT TL: 115].

Frederic described resilience as a student’s capacity “to keep on keeping on,
despite the knocks and the blows” [FC TL: 186]. It is a very important construct for the
student’s success in a graduate program: “You cannot underestimate people in their
capacity in an educational situation for agency and resilience” [FC TL: 187-188].
According to Frederic, resilience is associated with “respecting people’s power to get on
in looking to encourage agency” [FC TL: 212-213].

232
Johanna connected the idea of global mindset with the previously discussed competency of inquisitiveness: “They are almost like twins in many ways. Everything that you do has to be about the rest. It’s the fluttering of the butterfly wings. Anything that you do is really about the rest of the world” [JT TL: 118-120].

Frederic said that global mindset was something that he is conscious of working towards, but finds it difficult to achieve. He said, “It does need a certain amount of negotiation of working across different forms of social experience and bringing them into the classroom or a curriculum, and that takes quite a concerted effort in terms of curriculum design and process” [FC TL: 156-159]. He also said he has not quite cracked how to do this in the classroom:

I think the intention is there, but I do think traveling between local and global is also crucial. I think it’s important for social reasons. It think it is important for good learning. I think it is important for a shared future on this little piece of rock. [FC TL: 204-207]

The final competency discussed under the category of managing self was flexibility. Johanna said that the whole idea of flexibility in the work place “has really been used to hammer people” [JT TL: 123]. While it has been promoted as an ideal human quality, quite often it has really been used against people. She agreed that the ability to change one’s mind is a good thing, but not at the expense of “core values and principles so you’re . . . just at the mercy of the winds of change, that plenty of people want you to do” [JT TL: 125-126].

Frederic was antithetical about the language of this competency. He said it was “an almost meaningless term to me, in one way associated primarily with neo-liberal economic and endless drive to reform yourself under the imperatives of someone else’s agenda” [FC TL: 163-165]. He considered flexibility a political term, “unless you are
talking about flexibility of an educator in terms of negotiating how you arrive at a more
critical conceptualization” [FC TL: 218-220].

Johanna provided the following rank order for the category managing self: (1) character, (2) inquisitiveness, (3) global mindset, (4) resilience, and (5) flexibility. Frederic’s rank order was (1) inquisitiveness, (2) global mindset, (3) resilience, (4) character, and (5) flexibility.

Managing people and relationships. Johanna began her discussion of the five competencies associated with managing people and relationships by adding to the first question of this interview regarding the things she loves about working in adult education. The first competency discussed under this category was valuing people, and she said she could not believe she did not mention her colleagues and how wonderful they are to work with. This construct is what characterizes the staff members and co-workers and is the thing that “really fires us all up” [JT TL: 163]. She added,

We really do place a really high value on people. It doesn’t mean we suspend our judgment or anything like that. It’s all conditional positive regard. It isn’t really like in those freely idealistic terms which are good in their own right. It’s really being able to see everybody with their flaws as well as their good points, and really be able to see what their strengths are. [JT TL: 165-168]

Johanna said this competency is not only what the faculty try to impart as teachers, but also what they really try to foster in the students.

As an example, she described the scenario where students who have recently finished their research return to help work with students who are just starting. Johanna said, “If anybody said at the end of their program, ‘Why would I talk to them? I’m finished!’ we would think we have failed because they in their turn were welcomed in as first years and brought all the way along” [JT TL: 172-174]. She continued, “We really
do live in each other's shadows. That's a really important part of the job. It's an incredibly rich space because of that” [JT TL: 174-176].

Frederic concurred. He said valuing people was "crucial to adult education where it has to be integral to curriculum" [FC TL: 237-238]. He said he did not like thinking of this competency as a skill, but that it rather "has certain capacity for collaboration, and the goal and the process which is parallel is absolutely fundamental; and I think it does exist at a very deep level" [FC TL: 258-260].

The next competency discussed was interpersonal skills. Johanna tied this competency to the one of valuing people from earlier in the conversation, though she said she supposed interpersonal skills go beyond that:

I think that really being able to include emotional intelligence, being able to read somebody so that if somebody is upset, you can sit down and talk to them. But if you are upset, somebody has to sit down and talk to you. We make a cup of tea for people! It isn't just being pleasant and polite. It really goes into what we called affective capital, as it were. We care for people and therefore, that is part of the way we interact. We might have an abrasive part of our personality, but we can put up with that in another person if we know there is another side to them. So [it's about] really about knowing them to that extent, so that we just don't judge them on that . . . abrasiveness. [JT TL: 180-188]

Frederic’s only comment regarding this competency was that “fundamentally, you can’t work without them on any levels of students and educators” [FC TL: 243-244]. His comments regarding each of the comments in this part of the interview were very brief, though insightful [researcher's reflective journal].

The next competency discussed was empowering others. Johanna said that there have been many meetings at the institution where this construct has come up in the conversations, “because really what empowerment means is that I have something like power, and I'm able to give it to you—because that’s what the word implies” [JT TL:
191-192]. Johanna said she disagrees with this implication, however: “I know what it actually means. I do know about the redistribution of power. I think that is a very important thing” [JT TL: 192-193]. Johanna said she thinks that holding on to power is a big failure of leadership:

We see it in so many ways. I mean, in political leaders or in autocratic leaders, this holding on to power is so detrimental and the way that people hold on to power through fear, coercion and so on is really very questionable for the 21st century. [JT TL: 194-197]

Johanna said investigating the way power works is “incredibly important so that we don’t fall into the trap of manipulating people or coercing people or in any way diminishing a person’s capacity to have control over their own lives” [JT TL: 198-200].

Frederic’s response and reservation regarding the word were similar to Johanna’s. He said empowering others was absolutely fundamental for adult education, but he defined it as “negotiating the meaning of education all the time. You empower people by relativizing your own power, by relativizing and opening up the criticism, the idea of set or given knowledges. It is a constant dialectical process” [FC TL: 251-254].

The next competency discussed was teaming skills. Johanna said that both teaming skills and the following competency, cross-cultural communication, had been “colonized by business to the detriment of people” [JT TL: 204]. She sees the intense pressure that is put on other team members, particularly in an organizational setup, “where instead of the manager managing, your teammate is managing you” [JT TL: 205-206]. She said it is with a “heightened awareness” [JT TL: 206] and strong reservation that she values team building and teaming. Frederic had not much to add regarding this competency, only that he sees it interlinked with the competency of interpersonal skills.
The final competency discussed under the category of managing people and relationships was cross-cultural communication. Johanna began to discuss this construct by talking about the overarching idea of diversity in Irish society today. She said,

Ireland has been really quite mono-culture for the last 15 years or so. We’ve had a lot of refugees, asylum seekers, and other migrants into Ireland. So that meant we were all sort of similar—that is, all white. There were vast differences and all spoke English of some kind, but I think the way the new populations of Ireland have enriched our country is just without measure. However, we as a country have really been absolutely appalling in welcoming people to the country. [JT TL: 209-214]

She went on to describe the current issues of the Mediterranean refugees fleeing Syria and Mali and South Sudan, and the way Europe is turning their back on huge numbers of people in crisis. She said, “In many ways, Ireland has been pretty bad as well. We’ve had an appalling record” [JT TL: 216-217].

Johanna then described a part of the master’s program where diversity is addressed in more detail. She said that students from Nigeria, the United States, and other parts of Europe add so much to the learning. However,

because of the way the legislation works and the way just horrible things happen in the social welfare and so on, sometimes we have to do some things under the radar. It wouldn’t just be quite right, but we try to do it anyway. And that would be work with people that are very, very marginal altogether. By hook or by crook, get them into the classroom. [JT TL: 221-224]

Frederic agreed that cross-cultural communication was important and “one of the higher end goals, but it’s tricky” [FC TL: 240-241]. He reiterated Johanna’s comments that Ireland until the 1990s was an “incredibly homogenous place” [FC TL: 264], at least in terms of ethnicity. He continued, “It’s only been in the mid-90s where there is very distinct, very cultural differences—differences in class, gender, in religion—and these
are fundamental to our society, as they are to every other” [FC TL: 264-267]. He said that cross-cultural communication has become a much more pressing issue as a result of migration, “and I think we are at a very early stage of understanding how to do that” [JT TL: 269-270]. He said that the people in Britain understand aspects of cross-cultural communication and global mindset “in a much deeper way than we do in Ireland” [FC TL: 272-273]. Comparing the issue to the United States, he said, “Interestingly, the trouble in America [is there is] great knowledge about this, but I think racial color exists so savagely. And in some ways, it seems even more blocked than in Ireland” [FC TL: 273-274]. Frederic described how struck he was to witness this on multiple trips to the United States. The issue of cross-cultural communication is inescapable, but flawed and difficult in America:

It's very confusing. Primarily it has to do with structural power. I mean, the south side of Chicago is special. So what I am saying once again is that collaboration links to certain types of disposition and orientation, [it] links to the goal to encourage people to process this. [FC TL: 277-281]

Finally, he said that cross-cultural communication and intercultural communication and the varying levels of power in between different groups and communities, classes, and genders is fundamental in the bigger society: “But actually getting people to negotiate that in a meaningful way, rather than an antagonistic way, is tricky” [FC TL: 286-287].

Johanna provided the following rank order for the category managing people and relationships: (1) valuing people, (2) interpersonal skills, (3) empowering others, (4) teaming skills, and (5) cross-cultural communication. Frederic’s rank order was (1) valuing people, (2) cross-cultural communication, (3) empowering others, (4) interpersonal skills, and (5) teaming skills.
Business and organizational acumen. Both Johanna and Frederic made a few opening comments before discussing the five competencies associated with this category. Johanna said,

I do think Mr. Bird has a blind spot. I think he has managed to sort of bring together really important ideas and I think we were really talking about those in the other two categories. I think that by bringing them into business or organizational category, what he is doing is that he is bringing very good ideas into the service of a particular way of looking at the world. [JT TL: 235-238]

Frederic said he believes it is possible to mistranslate the fundamental aspects of adult education into a foreign language that they can make into something else:

It doesn’t mean that every complex cultural activity, including the department, including educational work, including institution, including a whole other set of key organizational acumen [are] not there. [It’s] being precise by what we mean by those terms and what is behind those terms is where it gets very interesting. [FC TL: 293-297]

The first competency discussed for this category was vision and strategic thinking. Johanna said that if we look at vision and our future, our work, and what is meaningful to us as a continuum from the other two categories, yet label it as a competency under the category of business, then “we are falling into a trap” [JT TL: 242]. She said one of the problems in Ireland now “is the complete dragging of our social lives into a neo-liberal economy” [JT TL: 244-255]. She talked about the 2008 financial crisis which was built upon a model from the United States as part of that neo-liberal economic outlook. Ireland, she said, has
gone through incredible austerity. We have had a terrible time in Ireland. The poorest of the poor have really suffered hugely. But there is no questioning of that model. All they’re going to say is that we are going to make sure that banks never have that kind of power again. They really do think that the basic model, the basic business model, is exactly right. [JT TL: 247-251]
Johanna spoke again about that “squeezed middle” [JT TL: 252] from the first question as the sight of struggle for adult educators:

Everybody wants a job. Yeah, absolutely. But the whole purpose of our lives isn’t a job. When you are in that frame, what’s the outcome of all our thinking, or feelings, our relationships, our educations? It’s all going towards this—our job. When, in fact, it’s really so much about the rest of our lives. [JT TL: 253-256]

Johanna insisted that the framework of a business organization must be interrogated very fundamentally so that

all those other wonderful things in our lives . . . [don’t] get corralled into simply business as usual, because I think it has to be the opposite of business as usual. I think it has to be about really a different way of looking at the way our working lives are organized. [JT TL: 258-261]

Johanna fondly recalled her childhood when her mother was a baker with her own bakery shop:

Everything about her work was how much she absolutely loved her work. It was very desperately not about becoming richer or anything like that. It was perfect for her because we all lived at the same place. There was no child care and it was really, really good. Because it was a bakery, it did mean that it was serving the entire community—that everybody had to go to the shop for bread and cakes and everything like that. That kind of business to me is a business that has been forgotten about when we talk about neo-liberal economics. Marx would have called her a petty bourgeoisie—that is somebody that really didn’t matter—in fact, he wouldn’t have called her a she [emphasis added] at all, he would have only called her a he [emphasis added], because he didn’t know there were women in the world. [JT TL: 264-272]

Johanna believes that the way our lives and our futures are focused on economics is not good:

I really do fear for adult education if it does go down that road globally. I do think vision is the most important thing. Vision really has to connect back to our first quality, which is values. If we have ethics and ethical principles underpinning that vision, I think it will be okay. [JT TL: 274-277]
Frederic’s comments regarding vision and strategic thinking were brief, but paralleled the importance and context which Johanna placed on the competency. He said,

In a complex, modern society, you can’t have any sort of medium-term activities without vision and strategic thinking. Unless there’s a vision of what’s valuable now and what could change and what you take from the past and what you want for the future, you will atrophy. That, of course, given the complex drivers and forces which are in control, demand strategic thinking and vision. [FC TL: 301-306]

The next competency discussed was leading change. Johanna talked about how dynamic the human race and the world is. “In fact, all living things are dynamic, because that is the way we are” [JT TL: 280-281]. She said we can design our future or let the future design us, and being able to combine the ideas of vision with the kind of future desired would be an important part of any design. Frederic spoke of change in terms of empowering others, “in terms of tapping into the fundamental human capacity for critical thinking and curiosity” [FC TL: 310-311]. Yet, he still sees leading change as a political question, even though he likes the idea of leading by following, “without which there’s no grassroots leadership” [FC TL: 313-314].

The next competency discussed was managing communities. Johanna interpreted this term from a management perspective, saying there is a lot to be learned from management and that some management theories are very good. She said, “I like the idea of a manager being able to have all these qualities that we are talking about, that are really good human qualities” [JT TL: 286-287]. Frederic also considered this competency from a management perspective: “I’m not there to manage. I’m there to interact with people, to hope in a sense of what it means to flourish in this world, what it means to be critical, what it means to have a good life” [FC TL: 342-344]. According to
Frederic, this requires self-management, not to be managed by others, and is fundamental to the field of adult education.

The next competency discussed was business savvy. Johanna approached her discussion of this competency from the perspective of the entrepreneurial skills obtained from the adult education graduate program. She said, “I think the skills that we get from research, from thinking, from talking about our research, from talking to people and so on, I think that they are incredibly valuable qualities and skills . . . nested in those other [competencies]” [JT TL: 290-292]. Johanna explained we used to live in a knowledge society, though we have lost that because of the way the economy has “colonized knowledge” [JT TL: 294], and as a result, this knowledge is something that must be reclaimed.

Frederic said business savvy is a competency he sees on a day-to-day basis in the adult education department. However, he was also apprehensive about mistaking business savvy as “sort of the driving logic of what education is” [FC TL: 322-323]. He added, “I think education and learning has non-linear knowledgeable aspects. So we need business savvy, but it shouldn’t be dominating how we talk about education” [FC TL: 323-325].

The final competency discussed was organizational savvy. Johanna admitted adult educators have to try to resist strict organizational structures, even though it is hard to resist it. She said it is possible to have flat communities and flat organizations, and she could see it mirrored in her department where there is a lot of teamwork and interaction with the larger institution:

If we were drawing an organizational chart as it were, we’d be in a little circle around a table, but then outside like a chimney coming out of a caravan would be
our president and all of these guys and they would be sending smoke up to them, obscuring what we were really doing and getting on with creating a model under which we could work. [JT TL: 306-309]

Frederic related the competency of organizational savvy back to character: “Strategy demands ethics” [FC TL: 329]. He mentioned Paolo Freire again and said we need trickle-down education which is organized within and across communities. The key, he said, is knowing when to listen: “To quote a grumpy old German philosopher, part of organizing is educating the educator. So you have to know when to be quiet, sit back and . . . develop a propensity capacity for people to do self-management” [FC TL: 333-336].

After discussing all five competencies of the category business and organizational acumen, Johanna provided the following rank order: (1) vision and strategic thinking, (2) leading change, (3) managing communities, (4) business savvy, and (5) organizational savvy. Frederic’s rank order was (1) vision and strategic thinking, (2) leading change, (3) business savvy, (4) organizational savvy, and (5) managing communities.

Upon review of all the competencies associated with Bird’s (2013) framework, Johanna agreed that it was an interesting and timely topic, one which the adult education department should perhaps think about more often if the predominant models are going to ever be challenged. She said,

People like you . . . are going to do that. I think much more than Mr. Bird . . . you can create a model that would really interrogate some of the assumptions that he has. I think your interest in the topic is really coming through and I think it’s really terrific. [JT TL: 313-315]
She emphasized the competencies of vision, self-reflection throughout the model, and an analysis of power as the highlights of the discussion. But she added, “All very relevant. All to be interrogated. All to be questioned” [JT TL: 327].

Frederic emphasized his attempt to generate discussions around different conceptions of leadership. He said the term competence itself is “linked to a certain way of envisioning learning education and social change, and not necessarily which is trying to cover all experiences about adult educational or aspirations of adult education” [FC TL: 369-371]. He wanted to make clear that he intentionally put some critical pressure on the general nature of the framework and conceptualization of the model. He said,

I think there is a whole world of difference between social practices and our description of social practices, and I think part of adult learning education is not to reify the world . . . not to take relationships and people as things, not to use categories to deaden our understanding of the world. [FC TL: 374-378]

He emphasized the necessity to never separate socio-historical understanding from any discussion around leadership: “I think it always has a content, and there’s always a power dimension” [FC TL: 380-381]. Frederic also said he does not decry the level of academic discipline that has arisen from the professionalization of adult education and the standards that have emerged from particular types of historical circumstances. But the history and the social activities of the field are important to understand as well.

Frederic took time to discuss some of the difficulties he had with regards to understanding the goal of the interview. He said that one approach could have been to discuss the ways in which these competencies are observed on a day-to-day basis in the real world of program design, curriculum development, and managing various imperatives of the institution. The other approach would be to provide a set of
normative descriptions, which are important as well. He provided a more normative approach to the conversation and he believed we covered that very well, but he was unsure if he provided the kind of information I was really looking for in the first place. This was a very different interview than most of the other interviews, and that’s neither good nor bad. It was simply a different perspective and I found the conversation fascinating [researcher’s reflective journal].

The final question asked each participant to discuss the gap that exists between the current state of the adult education graduate program and the ideal program given all available resources. Johanna contributed ideas such as the importance of a beautiful environment in which to learn, more time to be able to provide all the learning desired, expanded access with the use of technology so that all the libraries and journals in the world are at one’s fingertips, expanded use of guest speakers who can provide wise and expansive thinking on a variety of topics, and great food. She also said that many of the women in the program would have a greater learning experience if child care and elder care were provided by the university in order to help break down some common barriers. Finally, she said she supports a basic income for everyone. She described a project in Ireland advocating “that a rich country like Ireland, in spite of the austerity, could actually afford to have a basic income for everybody” [JT TL: 354-355]. She asked, “What is the point of capitalism if you could not provide a basic income for everybody?” [JT TL: 356-357]. Johanna said there is a terrible urgency to only work for money rather than self-expression, and that freedom would come from working at a thing you loved doing.
Frederic concluded the interview by exploring the grander role in which adult education and adult learning can play in the society as a whole. He believes that adult education has a social significance which goes beyond what is addressed at the university level: “I think building a genuinely democratic, participatory, ecologically sustainable, just, equal, global society is going to take a massive effort” [FC TL: 438-440]. Learning means renegotiating the very meaning of knowledge, and a new ecology of knowledge, a “sharing of artistry democratic preferences” [FC TL: 442-443] has the potential to unleash an unprecedented creative force among humans, if we as a society understand how to do make good learning happen and aspire to that.

Yet, taking into account where the field of adult education stands now and the forces that are lodging and shaping the field, there are “very real profound reasons to be apprehensive and anxious” [FC TL: 449-450]. Frederic said we are in difficult times, quoting a German philosopher Walter Benjamin who said, “The angel of history flies backwards” [FC TL: 452]. He said,

We are in a world system, but not a global society. It’s a very, very different thing. Very rich, tolerant, genuinely fluid, trans-world community, but there’s so many obstacles to that. And actually, I think, adult education, part of adult learning is point that out and as much as possible on a local level trying to overcome that. [FC TL: 455-459]

Frederic concluded, “Our era is going to be defined by the intention of the meaning and possibility of democracy. // Adult education has played a major role in fostering a global community” [FC TL: 461-463].

Case 7: Grand Italian University (GIU). One quote that provided insight into this case was: “People have this idea that there is a time in our life to study and this is . . . at the university, and then a time to practice that in the workplace” [JC TL: 207-209].
**Overview of Case 7.** Grand Italian University (GIU) [pseudonym] is one of Europe’s oldest and most prestigious multi-disciplinary institutions of higher learning. Located in northern Italy, GIU has over 70,000 students admitted in 32 departments (colleges), offering 81 first-cycle degree courses (Bachelor degrees), 80 second-cycle degree courses (Masters degrees), eight single-cycle degree courses (Bachelor + Master degrees), and a vast array of post-graduate courses.

For the purposes of this study, two participants from the Department of Philosophy, Sociology, Education, and Applied Psychology were interviewed. According to the university website, this department brings together scholars from various fields with the aim of developing interdisciplinary analyses of human experience in social contexts. Research topics mainly cover inter-cultural problems, analysis of social, educational and psychological processes, and individual choices and practices in sociocultural and historical contexts, with due consideration of basic underlying values.

**Participants for Case 7.** Two faculty members were interviewed for this case. The first participant for this case was Dr. Janet Callaway [pseudonym]. Janet is an assistant professor whose research interests include adult learning, adult and continuing education, teaching and learning methods, organizational behavior, and human resources management. Janet has published widely in many peer-reviewed journals and has presented in conferences all over the world. Janet has been working at GIU for 15 years. She is fluent in Italian, English, German, and can communicate in French as well.

The second participant for this case was Dr. Elaine Columbo. Elaine is a permanent researcher and assistant professor in education. Her research interests
include research and the teaching field, pre- and in-service teacher education, assessment and evaluation in educational contexts, on-line learning, and research methods. She has been in this position at GIU for over seven years. She is fluent in Italian, French, and English. See Table 14 for an overview of the demographic information for the participants of Case 7.

Table 14

*Demographics for Case 7 Participants*

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Gender</th>
<th>Degree</th>
<th>Years at Institution</th>
<th>Position at Institution</th>
</tr>
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<tbody>
<tr>
<td>Dr. Janet Callaway</td>
<td>Female</td>
<td>Ph.D.</td>
<td>15</td>
<td>Assistant Professor</td>
</tr>
<tr>
<td>Dr. Elaine Colombo</td>
<td>Female</td>
<td>Ph.D.</td>
<td>7</td>
<td>Assistant Professor</td>
</tr>
</tbody>
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The interviews took place on site in Italy in the offices of each participant. Each participant had received the interview protocol beforehand and had reviewed the questions prior to conducting the interview. In this section, I will present a synopsis of the opening interview questions as well as the key questions associated with the global leadership competencies from Janet only. The reason for this as outlined in Chapter 3 is because of human error with the recording of the second interview. The information provided below from Elaine is taken only from the researcher’s reflective journal and notes written during the course of the interview. This includes Elaine’s rank order for each category, which was captured in handwritten notes by the researcher during the interview.
Synopsis of the opening interview questions. The first interview question asked each participant to discuss a positive experience in the adult education graduate program at GIU. Janet began the interview by explaining how adult education instruction is incorporated into the Italian higher education system. She described the four different sectors identified in the field of education in Italy. Within the sector labeled Methodology and Special Pedagogy, there are scholars and practitioners interested in methodology related to children, teenagers, schools, and organizations. Under this sector is methodology for adults—teaching and learning for adults. Janet explained, “This is my area of study. My field of study is teaching and learning methods for adults—how to train, how to educate adults [who] have to teach other adults” [JC TL: 8-10].

The department at GIU merged two programs recently and the new program is called Management of Educational Scholar and Organizational Services: “So that means that in this program, we prepare students to work in the management of educational services and also in the organization in the field of human resources” [JC TL: 16-17]. She explained further that the students have courses such as foundations of adult education, special education, other educational disciplines, as well as philosophy, sociology of education, and psychology of education. Of the two master’s degrees offered in this new program, one is directed toward people working in management of educational services and educational programs, and the other is related to sociology and social change. There is also a doctorate program in education. Adult education is one of the many contexts in which doctoral students can focus their research.
She concluded this opening conversation by explaining that while there is no specific sector called adult education proper: The construct of adult education encompasses a wide-range of educational opportunities in formal, non-formal, and informal settings. She claimed the justification for the selection of GIU for this study was that this institution is one of the biggest and strongest in the field of education in all of Italy: “This is really the place where the educational faculty grows up. It’s a reference point for the starting faculty in Italy” [JC TL: 41-42].

In response to the first question regarding a positive experience in the field of adult education, Janet discussed a research grant successfully won in 2013 which was unique in Italy in the field of education. As the principle investigator of the project, Janet admitted she did not really have high hopes of being awarded the grant, given the size of the project and the fact that the entire team consisted of assistant professors. However, she and her team won the project:

> It was incredible and unbelievable because all these professors here—the full professors—when they were looking right at me, they were thinking that I was doing a good writing exercise. And when we won, they were so astonished because there were a lot of projects and we took all the funds allotted to these kinds of projects. [JC TL: 64-68]

Janet said this experience not only proved to be a great challenge, but also informed a lot of practice in her teaching and learning methods and her relationship with the students.

Unfortunately, Janet’s response to the second question regarding her feelings toward the future of the field of adult education was less enthusiastic. She said she did not feel good about the future of the field as it relates to Italy: “I think that there are a lot of new and interesting things to do, but we don’t have money at the moment . . . and
this is a big constraint” [JC TL: 76-77]. She said adult education is not a stable sector in Italy: “People don’t believe that education can really help or support people and improve their lives—not only their way of thinking, but their lives” [JC TL: 77-78]. Janet provided a great example of how difficult it is to understand the value of adult education as opposed to the hard sciences: “We are not heart scientists, engineering, or so on. That’s very difficult to share with people the values about education” [JC TL: 79-81].

Elaine also stated that she was uninspired regarding the field of adult education in Italy. She stated she did not appreciate the way the current system in Italy does adult education, which has an almost exclusive focus on theory rather than practice. Change is difficult, and “there is a constant loop from year to year” [EC TL: 7].

As with the majority of the faculty interviewed for this study, the question regarding the Standards were met with a shaking head: “Nobody has looked at this and many professors are not aware of this. Or they’re aware but they don’t utilize it in any way whatsoever” [JC TL: 90-91].

The next two questions asked the professors to describe an experience in the field of adult education in a global or international setting, as well as to describe their ideas with regards to the term global leadership. Janet said this aspect of her work is very important. She added, “I am doing just a little part of the program that has the aim to develop leadership competencies. I think that to be a global leader would be a challenge, really” [JC TL: 93-94]. However, she was excited to have this discussion because she felt that she would like to learn more about areas such as managing relationships since she is leading a research team with such global goals. Additionally, both Janet and Elaine spoke about their extensive international experiences traveling
for conferences and studying in other countries—Janet in the United States and Elaine in England.

Janet defined global leadership as leadership in a diverse culture, and agreed that this is a nice idea to strive towards increasing competence. She said, “I think about a set of competencies that people can use in a multicultural context and a multicultural setting, a bridge of diversity that can be related to organizations, to different contexts, and also to adult education as well” [JC TL: 100-101]. Elaine concurred, saying that in the educational system, we need people thinking globally. She said, “We have such a multi-cultural society, but it’s not reflected in the classroom instruction” [EC TL: 20].

**Synopsis of the global leadership competencies.** The material presented in the following three sections represent the three categories of Bird’s (2013) nested framework of global leadership competencies: managing self, managing people and relationships, and business and organizational acumen. Because the interview with Janet took place first, the order presented in this section follows the order in which she discussed each competency within each of the three categories. Discussions of each competency are presented individually with Johanna’s comments proceeding Elaine’s comments. The same process will be repeated for each category of Bird’s (2013) framework. A final section of the closing questions follows the presentation of data from the key questions regarding the global leadership competencies under inquiry.

**Managing self.** Janet began her discussion of the five competencies associated with managing self by describing how challenging it is in her institution, and in Italy in general, to try and work on these competencies:

> We are not working a lot on this [category]. . . . I might be aware of the importance of . . . a lot of them, and I’m trying to encourage the development of
these kinds of competencies in a certain way. But I have to say that I feel so alone; it’s more isolated to do these kinds of works. So we are not all working in this stage. [JC TL: 108-111]

However, Janet did discuss each competency in terms of normative statements as well as specific curriculum examples. With regards to the competency of resilience, she said,

We push our students a lot and we sometimes put them in front of a lot of difficult situations, but the problem is the difficulties are not related to the research—that can be normal because doing research can be difficult—rather, it’s related to the behaviors that some professors have. For example, not being available, giving appointments and not coming, taking three weeks to reply to an email—these are the kinds of things that we really have to avoid according to the needs [of the students]. [JC TL: 112-117]

These issues related to the behaviors of the professors is also connected to the competency of character. Janet emphasized that a professor in Italy is not only a scholar, but he is also a political person with many different responsibilities that are often matched in ways that are not conducive to being a good professor. She said, “so we put together our didactic activities . . . together with management, with political issues, with involvement in commissions, [and they] are not related to our program. . . . It needs to be political” [JC TL: 120-122].

Janet continued discussing issues related to the competency of character by discussing a specific example of a professor from another university who was also involved in a big research project, and as a result was never available for his student simply because there was no time. She said, “This is something that is not well balanced for me” [JC TL: 127]. She said the national center in Napoli checks on how the professors are preparing courses or doing peer observations, yet “we are just evaluated from the students at the end of the course with some stupid questions you
can’t even imagine!” [JC TL: 129-130]. With laughter, but a very serious undertone,

Janet said,

I think the best professor is the professor that does nothing [for] the students. That’s really a challenge. This evaluation tool is not enough, and we don’t have a teacher’s community, for example. We don’t share with the colleagues. We are working very isolated. . . . We are not asked to prepare a very pulled together and precise syllabus to the students. We just put there contents, evaluation methods, and a general description of the teaching. So that’s not enough. [JC TL: 131-136]

Janet continued, stating there is no faculty development in Italy, no teaching and learning center for professors: “We are only measured on the basis of our research, not on the basis of our teaching. That’s the problem” [JC TL: 138-139]. She said when she went for her promotion board, she just presented her research and her teaching was not taken into account at all. They did not consider whether or not she was teaching multiple classes while conducting her research, nor the evaluation of her students. The result is that you can teach one course in the year as an assistant professor and become associate only on the basis of your research alone. Janet said she has a real problem with that.

Regarding flexibility, Janet only said the students have to be flexible: “It’s just required” [JC TL: 148]. Elaine added that her students do not appreciate the opportunities that online learning provides. The discussions surrounding the competency of global mindset was met with the most surprising of responses [researcher’s reflective journal]: “Not in education. We don’t have this issue, I think” [JC TL: 149]. Janet said she was the very first professor to teach in English in the department. Also, she said she had only seven or eight international students in her
courses this year: “We have really very few or no international students. That’s weird” [JC TL: 151-152].

Janet discussed the challenges she faced with regards to adapting an English language textbook in her course. She was met with such resistance from her students because the book, which was a human resource management book, written in English and using an English-centric context, was irrelevant to the Italian context—according to her students. She said,

These examples are from other countries . . . and they [the students] were really not seeing the link or the bridge between these examples or how to transfer these competencies or these examples, these practices to their organizational context . . . of this [Italian] territory. [JC TL: 159-162]

The final competency discussed in this category of managing self was inquisitiveness. Janet said it is very different in Italy compared to the United States. She is trying to use learner-centered teaching in her courses but the students resist it continuously: “They’re used to just attending the class and listening to the lecturer, to the presentation, and maybe to 30, 40, 50 PowerPoints, and taking notes” [JC TL: 165-167]. Janet said the idea of the students taking responsibility for their own learning is a big, big challenge in Italy. After two or three classes, she asks the students what they thought of this approach and to write their questions or reactions. Half the classes answered that they simply wanted to start with theory and maybe, if there is enough understanding, move toward practice:

But to do practical things in class, it’s very difficult because we are not used to it. We understand this can be important, but in the last year, the last course, it’s too late. . . . Maybe if we had started earlier. . . . [JC TL: 173-175]

Janet trailed off without finishing the sentence, then with obvious frustration she said the students otherwise just say they do not understand what she is asking them to do.
She completed this line of thought by saying that she does not believe the students do not necessarily want to learn in a learner-centered approach, but that they simply are not used to it and have never really been encouraged to learn this way: “In America, they use this more” [JC TL: 180]. Janet said she had been promoting a lot of self-directedness and independence in the classroom, but she has stopped it over the last year: “Not because it didn’t bring results . . . but because it’s very difficult to encourage self-directed learning in this context. And I’m always trying” [JC TL: 185-188].

At this point, Janet provided her rank order for the five competencies associated with managing self: (1) resilience, (2) character, (3) flexibility, (4) inquisitiveness, and (5) global mindset. Elaine’s rank order was (1) inquisitiveness, (2) global mindset, (3) character, (4) resilience, and (5) flexibility.

*Managing people and relationships.* The first competency Janet began to discuss within this category was valuing people, specifically the lack of listening to the needs of the students that most instructors take into consideration. Janet agreed that each class is different and each student is different, so a strong needs analysis at the beginning of the courses would be beneficial. Yet, the reality is that there is never any change occurring: “We’re teaching the same courses in our careers. Normally, we don’t change courses. I started with at least three courses and then I have been doing that since 2008” [JC TL: 227-229]. Janet said it would be interesting to change the courses and the topics which she teaches, but there is a sense of ownership among the professors in Italy: “We are not doing that [changing courses] because the course is our property. So I’m teaching the Learning Methods for Adults course, this is my area and I have to possess it” [JC TL: 230-231]. Janet said there is never any fighting over
curriculum among the professors because the courses that are taught are so isolated and the same offerings are repeated year after year. “If we change something, we [would] fear disaster. We [would] cry . . . and fight about that for months” [JC TL: 234-235].

The next competency discussed was cross-cultural communication. Most surprisingly to this researcher, there was no sense of focus on this competency in the Italian case [researcher’s reflective journal]. Janet said, “I think that we are not aware about that [cross-cultural communication] as teachers” [JC TL: 237]. As an example, Janet said there are 38 faculty members in the department and less than half of them know a second language, and the second language most spoken is French. She said very few of her colleagues are able to read in English: “This is because of the structure of education in Italy, the old generation—old generation, I mean people between 55 and 70” [JC TL: 240-241]. Internationalization and cross-cultural communication and cultural education are silenced in the department, although admittedly, some of the other departments are making better headway: “Sometimes over at the business school, they are teaching all the courses in English. All the master programs are in English, but not here. So that’s the thing that’s just fascinating” [JC TL: 246-248]. Janet said only her and one other colleague have a couple of classes in English; all the rest are in Italian: “[Cross-cultural communication] is not emphasized in Italy, and not in the sector of education” [JC TL: 250-251]. Janet compared this to Germany, where she recently completed teaching a course for another institution with a very multicultural classroom.
The next competency discussed was interpersonal skills. Janet’s facial expression after I described the competency was very cynical [researcher’s reflective journal]. She described recent attempts to incorporate art-based teaching—learning how to deal with emotion using art, respecting different cultures, and diversity training—in an experiential learning environment. Together with another colleague she brought in to help her, there was measurable success and interest from the students. But when she tried to explain this to her Italian colleagues, she was met with instant resistance. She said,

The students are more open . . . if you justify the approach, relating some feeling or emotion to the field of adult education. They are scared at the beginning, but if you encourage them, they’ll slowly do it. But not the colleagues. [JC TL: 261-264]

The competency of teaming skills generated a lot of energy in the conversation. Janet provided an example of an online group work exercise where she asked her students to describe the meaning of adult education. They were allowed to discuss it online or in person, however they wanted to accomplish the discussion. The students were unable to process the value of teamwork. The students would say, “It’s too difficult. This work is too difficult to meet and to work at. If we had to do some work, it’s better to do them in class, not outside the class” [JC TL: 193-195]. Janet said that was indicative of a deeper issue with regards to teaching style, that her students do not appreciate the practical application of knowledge. She said, “I will not be discouraged of that for sure because I think that this can be really a way to let people think about that and to share with them some new perspectives. But this university is much too old” [JC TL: 198-200].
The big problem in Italian universities, according to Janet, is that is not a place to practice: “University is a place to study in Italy. And to study means for us not to do practice. So for us, theories and practice are completely divided. That’s a very strong position of the Italian university” [JC TL: 201-204]. When I asked where practice is taught if not at the university, Janet laughed and responded, “Yeah. Yeah. Exactly. Yeah. Exactly” [JC TL: 207]. She continued, “People have this idea that there is a time in our life to study and this is just to study at the university, and then a time to practice that in the workplace” [JC TL: 207-209]. Janet even lamented attempts to bring in guest speakers, people working in business for example just to allow the students to see that kind of work a student might move into after graduation: “It’s something that is, for some, for a group of my colleagues here, terrible. We don’t have the duty to prepare people for work” [JC TL: 213-215].

The final competency discussed associated with the category of managing people and relationships was empowering others. Janet admitted that this is an area that she is learning more and more about. She said she was the first scholar in Italy to teach Brookfield’s idea of giving up power related to teaching, sharing the power, and moving it around the room while you are teaching:

It’s the first time that an academic was talking about this in all of Italy. But because I’m working a lot with the American colleagues . . . and teaching with the text of Brookfield, and just talking about participatory approach—Power, oh my God. [JC TL: 270-275]

Her colleagues were flabbergasted, saying that the students are not to worry about the power: “It’s very, very difficult to introduce this issue or to discuss this. I think that very few students are aware of the power that they have in the class” [JC TL: 277-278].
Upon completion of her discussion of all five competencies in this category, Janet provided the following rank order: (1) teaming skills, (2) interpersonal skills, (3) valuing people, (4) empowering others, and (5) cross-cultural communication. I found it incredibly interesting that in an interview about global leadership competencies, and at an Italian university, the number five rankings for both of the first two categories were global mindset and cross-cultural communication [researcher’s reflective journal].

Elaine provided the following rank order: (1) teaming skills, commenting that the students need to learn how to move into the world and the workforce from the school environment, because only in school do people work alone; (2) empowering others; (3) valuing people, mirroring Janet’s belief that the student voice is very important; (4) cross-cultural communication, agreeing with Janet that this university does not really focus on this competency; and (5) interpersonal skills, saying that this is great in the Italian culture, but not so much at the university.

Business and organizational acumen. The final category associated with Bird’s (2013) framework brought out a lot of ideas from both professors. Janet said that these were important questions to address because she does not think the Italian universities are working enough in this area of knowledge transfer. She said that in her master’s program, which has 70 to 80 students now, only around 5% of the students are making any kind of connections in their theses to areas of business and organizational savvy. One reason for this is that the majority of the students are full-time students, without real world experiences yet. There has been a push in the last few years with professionals returning to the higher education system because of austerity measures or job promotions, but for the most part the students are just working in hotels or pubs to help
pay their way through school. As a result, the primary focus of the students is not yet on these macro-level competencies.

For the discussion of the competency leading change, Janet spoke about a student survey administered by a national institution that all students must complete. After three years, the students are asked if they are working yet in the field of education. Elaine said, “Change is the engine of the life. Change is movement. Progress is important. Change must be active” [EC TL: 43-44].

Managing communities is not encouraged much at the institution. Janet said she is really trying to change this. She was scheduled to present her research into teaching and learning methods the following day to a group of students from a different department in an attempt to bridge boundaries between the departments and student experiences. She said in the age of facebook, Twitter, and other social media, she is surprised at how little of this kind of community building is taking place in the university these days. Elaine also commented that these networks must be more than just institutional, that collaboration is important for bridges to truly be strengthened.

Janet also said that vision and strategic thinking is rarely emphasized at the university. She spoke again of the big research project she had been awarded. She and her team decided at the last minute that a group of students needed to be included in the project in order to give them feedback on the research. Janet said she rarely sees that kind of input allowed in the field of education: “We are not developing strategic thinking so we are not putting them in . . . the process of thinking for themselves for their future, their future job, future situations” [JC TL: 323-325]. She said most students who are working in the field of education are underpaid and dissatisfied, and few can get
good jobs directly associated with the degrees they are obtaining. She added, “It’s not a very successful thing, I would say. But we are improving” [JC TL: 328-329]. She described another university who is developing a six-month course for master students that help to develop organizational competencies: “It’s really new and they are trying to test this kind of course, so we will see. We are thinking about that a lot in terms of research, but not yet put it into practice” [JC TL: 330-332].

With regards to understanding the Italian mindset with regards to organizational savvy, she explained:

The faculty here did a very linear career. They are not coming from other professional contexts. So they graduate, they did the Ph.D., they worked 10 years as a contractor [instructor], then after 10 years they enter as an assistant professor. But for some of them, this is the only context that’s there. So it’s very difficult to relate their job in the class to a professional context. [JC TL: 335-338]

Janet said it is very difficult for the professors because they do not really know business or other organizational contexts in order to teach the competencies associated with this category. To top it all off, all of the academic experiences are usually conducted at the same university! Elain concurred, stating that in this department there really is not much attention given to talking about the business side of adult education.

Although she said none of the competencies are strongly identified in the curriculum, Janet provided the following rank order: (1) leading change, (2) managing communities, (3) vision and strategic thinking, (4) organizational savvy, and (5) business savvy. Elaine’s rank order was (1) leading change, (2) managing communities, (3) vision and strategic thinking, (4) organizational savvy, and (5) business savvy.
Upon review of all 15 competencies, Janet said the only competency really missing from the discussion thus far is the need in the adult education sector to be politically involved in the organization: “So a good leader in Italy, a global leader in Italy, has to be for sure involved in the political context” [JC TL: 352-353]. She also really wanted to emphasize her desire to do more cross-departmental relationship building, for example with the business school:

Because I have a good relationship with the business school, otherwise I couldn’t do what I’m doing in this department. Because if you are not related to them in some way, you’re not allowed to teach a course called human resource development or organizational development. That belongs to business. [JC TL: 365-368]

The final question asked each professor to describe the missing pieces between the ideal situation for the study of adult education and the current situation. Janet provided the following elements: denaro (money), better networking between departments, professors, and students; more collaboration, sharing notes, insights, and ideas on a global level; a greater focus on teamwork in the classroom; more mobility for teaching staff to expand their teaching offerings; and finally a very important, serious dialogue with the stakeholders to let them know what the field of adult education is really all about, “because it’s not clear yet. Even my father doesn’t know exactly what I’m doing. This is not a problem in other departments. This is our problem. A lot of people don’t understand because we are not communicating well” [JC TL: 379-381].

Summary of Chapter

This chapter presented the narrative findings from all seven cases selected for this study. First, an overview of all seven institutions was presented. Each case consisted of data collected from two participant interviews, as well as data from field
notes, the researcher’s reflective journal, and supporting documentation. For each of
the seven cases, an overview of the institution, a short introduction of the participants,
and a synopsis of the opening interview questions and the global leadership
competencies were presented. The data represented the participants’ responses to the
interview protocol in support of the research questions for the study.
Chapter 5

Thematic Analysis of Findings

The purpose of this study was to explore the extent to which global leadership competencies were addressed and developed in adult education graduate programs in the United States and Western Europe. This chapter presents a discussion of the findings from an iterative analysis of the emergent themes in the data for this study. Following the research questions as a guide, discussions are presented first for each of the a priori categories identified by Bird’s (2013) framework of nested global leadership competencies to determine which global leadership competencies were addressed in the selected adult education graduate programs. Emergent themes are presented from the iterative analysis of each identified competency. This is followed by a presentation of data indicating which competencies the participants perceived to be most important and less important in their programs. Next, a review of the best practices which emerged from the data is discussed. Finally, a discussion of the comparisons between the cases of the United States and those of Western Europe is presented. The chapter ends with observations from the study.

The data sources for each case included two participant interviews, field notes, the researcher’s reflective journal, and supporting documentation. Supporting documentation included sources such as course syllabi, university strategic plans, departmental guidelines, and information gathered from official websites of the selected institutions. The following research questions guided the analysis of the data:
1. Which global leadership competencies are addressed in the selected adult education graduate programs in the United States and Western Europe?

2. Which global leadership competencies are perceived to be the most important by faculty and administration of the selected adult education graduate programs in the United States and Western Europe? Similarly, which global leadership competencies are perceived to be less important by the interviewees?

3. What are the reported practices to develop global leadership competencies in the selected adult education graduate programs in the United States and Western Europe?

4. Based on the researcher’s analysis of the data, what are the similarities and differences in the development of global leadership competencies between the selected adult education graduate programs in the United States and those of Western Europe?

**Research Question 1: Global Leadership Competencies Addressed in the Adult Education Graduate Programs**

The first research question was designed to determine which of the 15 global leadership competencies associated with Bird’s (2013) framework of nested global leadership competencies (see Table 1) were addressed in the selected adult education graduate programs. An a priori coding analysis of the global leadership competencies within each case was combined with an emergent thematic analysis of descriptive codes arising from the data. Table 15 presents the 15 competencies used as a priori categories in the initial stages of the iterative analysis of the data. The semi-structured interview protocol (see Appendix J) was also developed with the intent of providing the participants the opportunity to identify global leadership competencies which may not
have been included in Bird’s (2013) framework. These identified competencies were also included in this presentation of the findings for research question one.

Table 15

*Nested and A Priori Categories Used at Beginning of the Data Analysis With Emergent Categories*

<table>
<thead>
<tr>
<th>Nested Category</th>
<th>A Priori Category</th>
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<tbody>
<tr>
<td>Managing Self</td>
<td>Inquisitiveness</td>
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<td>Global mindset</td>
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<td></td>
<td>Flexibility</td>
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<td>Character</td>
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<td></td>
<td>Resilience</td>
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<tr>
<td>Managing people and relationships</td>
<td>Valuing people</td>
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<td></td>
<td>Cross-cultural communication</td>
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<td>Interpersonal skills</td>
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<td>Teaming skills</td>
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<td>Empowering others</td>
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<tr>
<td>Business and organizational acumen</td>
<td>Vision and strategic thinking</td>
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<td></td>
<td>Leading change</td>
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<td></td>
<td>Business savvy</td>
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<td>Organizational savvy</td>
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<tr>
<td></td>
<td>Managing communities</td>
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<td><strong>Emergent categories</strong></td>
<td><strong>Mission</strong></td>
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<td></td>
<td><strong>Discipline</strong></td>
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<td></td>
<td><strong>Technology</strong></td>
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<td></td>
<td><strong>Social justice</strong></td>
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*Note:* Derived from Bird’s (2013) Framework of Nested Global Leadership Competencies

The 15 competencies associated with Bird’s (2013) framework were categorized into three broad themes: (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen; and are presented here in the same manner. The following section discusses the data collected for each category and competency.
identified from Bird’s (2013) framework, as well as competencies that emerged from the data not included in the model.

**Managing self.** The competencies associated with the category managing self were described by most of the participants in this study as important and solid components that permeate throughout the curriculum of the adult education graduate programs. Admittedly, though the programs were not designed around a framework which focused on these kinds of competencies, the development of these competencies were integrated into every aspect of the student experience. While there may not be particular courses or modules associated with them specifically, they are an important part of the interaction that takes place between the professors and the students. These competencies are often a reflection of the teaching practices and expectations of the students themselves. As Caroline stated, “We don’t really talk so much about the personality in terms of managing yourself. It is more something that we do *between the lines* [emphasis added], for instance. It is more something that you get from the professors when you talk to them face-to-face” [CN TL: 291-293]. The participants in this study were keenly aware of the value these competencies played in the success of their students.

**Inquisitiveness.** Three themes emerged from the data: (a) student experience, (b) role of professor, and (c) teaching practices.

**Student experience.** The findings indicated curiosity was a necessary quality for student success. Other descriptive terms coded within this competency included the students’ open-mindedness to the learning process; willingness to ask questions; desire to find their passion within the broad field of adult education—even if it challenged their
fundamental beliefs in profound ways; and a genuine interest in continuing this academic journey over the long haul. The overall finding was that the development of this competency was firmly based in the student experience. From admissions to graduation, the opportunities to experience something new was unparalleled in their lives, providing new perspectives on their personality, their career choices, and their place in the world on a regular basis.

Role of professor. The role of the professor, however, was also crucial. As Frederic stated,

Our job as adult educators is to stimulate, enlarge, [and] encourage . . . that sense of curiosity . . ., to find a sense of interconnection and difference in the world, to see things in their full complexity, and how to use that curiosity to change things. [FC TL: 146-149]

Adult educators have a powerful role to play in the expansion and shaping of their students’ ever-expanding ideas. The findings suggested this is often facilitated by the implementation of self-directed learning techniques, including the allowing of personal selections when it comes to the multiple strands of a student’s research agenda, topics for discussion, classroom and course-long projects, readings, and publication options.

Teaching practices. Other data emerged regarding specific teaching practices associated with the development of inquisitiveness, including a focus on writing as “a way of knowing” [JK TL: 29] and exploring of new ideas. Special courses and assignments designed to facilitate the student’s interaction with areas of inquiry in which they are deeply interested and curious about were also discussed.

Global mindset. The competency of global mindset represented the most easily identifiable connection to the phenomenon of global leadership under inquiry for this study. All 14 participants provided comments to some degree, though the range of
explanations regarding the extent to which global mindset is addressed in the adult education programs shifted from crucial in every aspect of the curriculum (Case 1) to simply not addressed in any real way in education (Case 7). Four themes emerged from the data: (a) encouragement to learn new perspectives, (b) personal and institutional resistance, (c) “global” applied to local issues, and (d) teaching practices.

**Encouragement of new perspectives.** All 14 participants described the encouragement they offer in and outside the classroom for their students to learn new perspectives on the world; to expand their cultural experiences; to engage with the other; and to incorporate historical, cultural, and geographical facets into their research and learning experience. Additionally, the integration of international students into the day-to-day student experiences emerged as a powerful support in the development of this competency. Describing global mindset in the classroom, Lynn said, “almost all my classes have something with international—international students, for example—in it; certainly the International Adult Education class really gets people thinking about what is appropriate to learn about” [LF TL: 71-72]. However, the extent to which students find success in developing this competency is often based on how much they are willing to engage in the process. Frederic said,

> This is something I’m conscious of working toward, but it’s not easy to achieve. It takes a concerted effort to negotiate across different forms of social experience and bring that into the classroom in terms of curriculum design and process” [FC TL: 155-159].

**Resistance.** Also, there is often resistance from the students of the attempts to incorporate more of a global mindset in the classroom. Karsten from Germany stated that while there is a constant awareness from students and instructors to engage with the global society inside the classroom, there is a segment of the population which is
distrustful of this process: “You have a neo-traditionalist, conservative to right wing neo-fascists [segment of the population who] would frame it as so-called negative globalization. We have to shut down the walls and go back to some kind of mythological solidarity” [KE TL: 215-217]. Five of the 14 participants stated there are some students who have a very difficult time transferring new knowledge learned from a global perspective into real-world, practical, and local applications. Janet said many of her students were unable to transfer the lessons of international examples to their local arena; while Joyce was more adamant, saying students have a hard time taking what they have learned and applying it in any new context, much less global. Similarly, Buell said for many students, it is very difficult to begin this process of expanding their worldview.

There were also many examples of success which emerged from the data. Programmatic expansion of opportunities to travel, work, and study abroad emerged as a theme, as well as the integration of internationalization of curriculum in assignments, discussions, texts, class trips, and research. Many students took the opportunity to increase their global mindset through independent study, research projects, and selection of courses, although only one case offered a course exclusively called International Adult Education.

*Global applied to local issues.* Finally, the word global was described by many of the participants in a broader context than just international. Many issues within the borders were discussed in terms of expanding global mindset, leading many participants to discuss how the integration of “global” issues such as immigration, migration, language use, discrimination, race/ethnicity, gender, gay rights, social justice,
and human rights permeate the discussions and assignments offered in the adult education programs. For example, the syllabus for an Organization and Community Processes course at AESU describes the responsibilities associated with creating a model organization associated with solving a social issue. Joyce stated, “Most of the organizations which the students create deal with some social justice issue” [JK TL: 396-397], and many of these issues traditionally associated with global mindset are often incorporated into these elements.

**Flexibility.** Four themes emerged from the data associated with the competency of flexibility: (a) benefits for student success, (b) byproduct of neo-liberal economics, (c) influence of professors, and (d) teaching practices.

**Benefits for student success.** This competency of flexibility generated the most diverse of responses between the two geographical areas in this study. The participants from the United States spoke about this competency in terms of the benefits it can bring toward student success. It was described as necessary and important for the student, though some students often have a hard time accepting change and instability in their studies. Caroline said students who are flexible learn to be tolerant, to understand others, to think outside the box, and to take care of themselves.

**Byproduct of neo-liberal economics.** However, of the six participants interviewed from Western Europe, five ranked flexibility at the bottom of the list of competencies for this category. Frederic from Ireland stated that flexibility was “an almost meaningless term to me, in one way associated primarily with neo-liberal economic and endless drive to reform yourself under the imperatives of someone else’s agenda” [FC TL: 163-165]. This was a theme addressed by participants in both the United States and Western
Europe. Johanna in Ireland said that flexibility has been hammered into people and promoted as an ideal human quality, though it has in reality been so often used against people in society. Meanwhile, Janice said each individual has the opportunity to take the language used in this discourse into their own consciousness: “The hierarchy of knowledge will continue to become more entrenched in the society as professionalization and skill-building contribute to the neo-liberal policies of our government and our consumer society” [JS TL: 121-123].

In Germany and Italy, meanwhile, the higher education system was described as extremely rigid with regards to the structure of the graduate programs, often hindering the development of flexibility. Karsten explained that the organization of university studies in Germany these days are much more curriculum-oriented and less flexible than ever. In addition, there are school-leaving examinations that must be addressed and centuries of culture within the halls of the institutions of higher learning that seem insurmountable when it comes to flexibility.

Influence of professors. Yet, there was also a positive sense when describing flexibility in terms of the influence the professor brings to the classroom. Frederic described this competency as a way of negotiating how a faculty member can arrive at a more critical conceptualization of the curriculum. He said it was absolutely crucial to be able to manage and structure the curriculum and program with enough flexibility to allow negotiation between experiences. Johanna said that although it is good to be able to change one’s mind, it is not so at the expense of “core values and principles so you’re . . . just at the mercy of the winds of change, that plenty of people want you to do” [JT TL: 125-126].
Still another interpretation of this competency from the professor point of view came in the form of risk-taking. Robert said students have to be able to stick their neck out and feel comfortable with trying new things. Learning how to navigate the relationship between the student and faculty is also a theme which emerged in the data. As Joyce stated, “I'm really more flexible that people think. I'm hard, but I’m also helpful” [JK TL: 112].

Teaching practices. The participants provided numerous examples of how this competency was manifested in the curricular and program elements, including providing multiple alternatives for study and research, negotiated assessment options, and flexibility with regards to due dates and classroom readings.

Character. Two themes emerged from the data regarding the competency of character: (a) expectations of the students and (b) teaching practices.

Expectations of the students. Most of the participants said a solid foundation of character was an expectation of the student entering the program, although a few of them said it was also a competency which can be developed along the way. Only one professor, who ranked character last in this category, claimed she only did that because she felt character was the one competency over which she had the least amount of control. Ethics was a common term used throughout the conversations about character, with some professors claiming to discuss this more than others throughout their curriculum. However, none of the professors said this was a focus of their teaching. Robert and Lynn both said they do not do a lot with this in their classes, but admitted maybe they should.
When addressed both in the classroom and between the professor and student on a face-to-face individual basis, it was usually in terms of discussions regarding plagiarism, student handbooks, ethical behavior in the classroom, and students taking personal responsibility for their own work. Another common finding was discussions of the value of ethical research in the scholarly field of adult education. Johanna spoke against the idea of “smash and grab research” [JT TL: 86], where elite people go in and grab the knowledge of marginalized people and scurry back to the university to sell that knowledge around the halls of higher education. She said researchers should respect themselves and their place in the world. Ethical dilemmas are discussed in some coursework, specifically Internships and human resource development course.

Three of the participants specifically discussed the fact that character is not always static: Oftentimes, the professor cannot tell the student what the ethical answer is in a given situation. They can explain what they would do, but students will always have to make some of those decisions on their own, and they may choose a different path.

*Developmental practices.* Experiential opportunities to help develop character included allowing the student to help with research, with teaching classes, and shadowing; especially if the faculty member is also involved in the administration of the department.

*Resilience.* Three themes emerged from the data: (a) surviving the disorienting dilemma of graduate school, (b) student agency, and (c) teaching practices.

*Disorienting dilemma.* Frederic described resilience as a student’s capacity “to keep on keeping on, despite the knocks and the blows” [FC TL: 186]. He declared
resilience a very important construct for student’s success in a graduate program, adding that their capacity for agency and resilience cannot be underestimated. Karsten agreed, adding that resilience is learned through experience. Dealing with the frustrations associated with being a graduate student is just a part of the process. Janice said students need to be able to survive the “disorienting dilemma” [JS TL: 261] that occurs when deep questioning and reflection occurs during the course of the graduate program. Students who run away and hide when new knowledge comes into their lives are not going to be able to successfully transition into any new setting. As Janice said, “First ask the question, then be open to transition” [JS TL: 265-266].

**Student agency.** Lynn stated helping students work through some of the problems and anxiety levels they are experiencing along the way is a constant part of her job as a professor. Buell and Gregory both commented that most students come into the program with a certain propensity for this, which can often be seen during the admissions process. Robert added that resilience is also a competency which professors can help to develop in their students. When students say they do not know how to write an article or conduct a certain kind of research, the professor’s role is to help them gain agency and survive the criticism that is bound to come along on their journey through the graduate program. Johanna added, “A little knock back isn’t the end of the world. That’s for sure” [JT TL: 115].

**Teaching practices.** Specific practices within the curriculum and program elements which help to develop resilience included formal and informal mentoring programs, detailed guides for specific skills such as presentations and writing for
publication, and regular communication between advisor and advisee at all stages of the graduate student process.

**Managing people and relationships.** Findings from the second broad category, managing people and relationships, identified more specific teaching practices among these five competencies and, in general, the most energetic moments of the conversations occurred during this phase of the interviews [researcher’s reflective journal, June 2015].

**Valuing people.** Four themes emerged from the data regarding the competency of valuing people: (a) conditional positive regard, (b) importance of student voice, (c) capacity for collaboration, and (d) teaching practices.

*Conditional positive regard.* The majority of the participants spoke about this competency in a multitude of positive terms, including descriptors such as crucial, most important, showing mutual respect, and the primary focus of the professor and the program. Four of the participants specifically emphasized the importance of the student voice, even in times when barriers must be overcome. Rachel, for example, described the difficulty of achieving this competency. She explained, “Maybe you are able to understand that there’s a different culture in cross-cultural communication, but to value those people and their opinions can be very difficult” [RM TL: 159-161]. She said student capacity for understanding and respecting differing opinions are easier to perceive, but to actually value something a person disagrees with is a challenge. Janet spoke about the lack of value often placed on the needs of the students by the structure of the higher education system in Italy, while Caroline said this kind of psychological
way of framing the learner as a future teacher simply was not the focus of the program and not addressed in the curriculum.

*Importance of student voice.* Elaine emphasized the importance of the student voice, and Johanna said the value placed on the students is what “fires us all up” [JT TL: 153], though it does not mean professors should suspend judgement along the way. Valuing people is something that is both imparted as teachers and fostered among the students. Frederic described the goal and process of valuing people as absolutely fundamental, existing at a very deep level in the adult education field.

*Capacity for collaboration.* Capacity for collaboration describes the relationship between the faculty, learners, organization, and greater goals of the adult education field. Karsten said this competency starts from within the adult education department as well as the organizational structure of the institution. Everyone at all levels of the organization have ideas worth valuing, even those who are traditionally disenfranchised. He described the German concept of *Bildungsferne*, which is a program targeting groups of learners who have major barriers to overcome with respect to the learning process, and are often undervalued in society. The discourse about these people is challenging, but important in order to avoid the stigmatizing and stereotyping that often occurs in dealing with these populations of learners.

*Teaching practices.* Specific practices manifested in the teaching and associated with the development of this competency included embedded discussions, targeted assignments to determine terminal values, readings from multiple disciplines and cultures to facilitate respect for other research models, modeling, and utilization of
alumni in order to help students understand the value of paying it forward to their fellow students following behind them in the program.

**Cross-cultural communication.** Three themes emerged from the data regarding the competency of cross-cultural communications: (a) demographics of student population, (b) program support, both positive and negative; and (c) teaching practices.

**Student demographics.** Changing demographics, especially in the European cases, dominated the conversations regarding this competency. In Germany, the high level of Turkish migration into the country over the past few decades has led to an increased culture- or milieu-connected aspect to the student population. Likewise, in Ireland, both participants spoke about how the general demographics of the population in the country has been changing over the last 15 years. Refugees, asylum seekers, and migrants have moved into a country that previously was extremely homogenous, at least in terms of ethnicity. While this change has “enriched our country without measure” [JT TL: 212], many of the governmental and educational policies “have been absolutely appalling” [JT TL: 213]. Frederic said cross-cultural communication as a competency is clearly one of the higher end goals of the program, but it is tricky when trying to navigate the societal implications which led to the demographic changes.

**Program support.** Increasing the number of international students within adult education programs was another programmatic finding across all seven cases. Touted as a positive aspect of the theme program support, the majority of the participants in this study described the value this part of their student population brings into the day-to-day discussions and activities of the coursework. In Ireland and Germany, the
participants spoke about the changes that have occurred in the legislature allowing greater access for international students into their programs, as well as individual programmatic attempts to bring more of these students on board. All four of the cases in the United States emphasized programmatic attempts to increase international student participation. Robert said, “It’s just this wonderful crucible for all these different kinds of people. It quite naturally comes out in the classrooms. . . . It’s just the nature of who our students are” [RW TL: 199-201].

Another positive aspect of the program support theme which emerged from the data included specific courses that address some of these issues. MGU offers a specific course called International Adult Education, while the adult education program at AESU offers a number of courses and certificate tie-ins with an international, cross-communication flair.

However, the findings were not all positive. Both participants in Italy declared that their departments were not focused on this competency: Janet said the teachers in the department were not aware about this at all. In fact, she said that of the 38 faculty members in the department, less than half speak another language, and that is primarily French. She and one other colleague—both participants in this study—were the only two who had tried to communicate to their students in English. The idea of the internationalization of curriculum and cross-cultural communication was silenced within the department by the other faculty. Similarly, Gregory at AGU, speaking about doctoral programs in general in the United States, said adult education is amazingly remiss in foreign languages. He blamed “pinhead predecessors who . . . failed to see the real value in language acquisition” [240-242]. He said a student can earn a master’s degree
in English as a second language in this country without ever speaking a second
language, and he is determined to change that.

*Teaching practices.* The final theme associated with this competency were the
teaching practices designed to develop cross-cultural communication. These included
allowing research to be conducted in one’s native language, employing guest lecturers
from other countries, conducting field trips to international businesses, conducting
cultural quizzes, embedded discussions, and presentations about the topic.

*Interpersonal skills.* Two themes emerged from the data regarding the
competency of interpersonal skills: (a) building affective capital through teaching and (b)
teaching practices.

*Building affective capital.* Twelve of the 14 participants spoke about this
competency in a positive sense. Participants from both Ireland and Germany spoke
about the value of learning the kind of counseling skills future professionals are bound
to experience in the field of adult education. Johanna talked about the care required to
communicate with students and the affective capital that is gained when we “make a
cup of tea” [JT TL: 143] for people. Caroline said these skills are taught in the
counseling module within the program and Karsten emphasized this as a central issue
at the beginning of his courses. Understanding how the psychological structures of
interpersonal skills are applied within teaching situations or for a specific learning
situation is addressed in the program. Likewise, Frederic said these skills were
fundamental and that it was not possible to work without them on any level as students
and educators.
Gregory agreed, claiming teaching as a very personal undertaking. The instructor serves as a bridge between the body of knowledge and the student, and the role of the instructor is to prepare the student to transition into their own body of knowledge until they can do so without the lifeline provided by the instructor. Rachel took that idea of a bridge beyond academia into the workforce, saying that most people leave jobs not because of job-specific knowledge, but rather it is the soft skills, their ability to get along with others, which stop their advancement. Robert concurred, claiming that at the end of the day, it is the interpersonal skills rather than the technical skills that get you in the door. And once you are in, the interpersonal skills are the ones that will allow you to advance.

Janet and Joyce were more skeptical. In Italy, Janet had tried to incorporate experiential learning and arts-based teaching into her repertoire of teaching approaches, and while the students eventually bought into it to some extent, trying to share this with her fellow colleagues on the faculty was horrible. She said they were inflexible to try something so new and non-traditional. Joyce’s mindset regarding this competency was more emphatic. During the course of the interview, she mimed gagging and claimed that these kind of psychological constructs of development were not her area of focus. Although Joyce agreed there were other faculty in the department, as well as specific classes offered within the curriculum, that offered development of these skills, she provided numerous examples of one-on-one counseling she had to do with unique cases, students with major barriers, in which she was able to model the best of interpersonal skills.
Teaching practices. Specific courses which address this particular construct included Learning Styles, which is all about becoming more self-aware of personal idiosyncrasies; and any online course where collaborative learning takes place. Other teaching practices included assignments designed to practice interviewing skills and programmatic opportunities for students to come together outside the classroom in order to build a better sense of community among themselves during the course of their studies.

Teaming skills. Three themes emerged from the data regarding the competency of teaming skills: (a) working in teams is necessary, but challenging, (b) structured support, and (c) teaching practices.

Working in teams necessary. Every participant in this study said they incorporate team work into their curriculum. The primary reason for this was the necessity of learning how to be a part of teams once the students enter the workforce after graduation. Elaine claimed only in education do individuals work alone; Rachel said no one will ever have a job in adult education where he or she will not work together with someone else; and Gregory said we are not independent thinkers, but rather individuals who work very well in conjunction with each other.

However, five of the 14 participants declared that their students hate this requirement. Lynn said she does not like working in teams herself, but she still incorporates it into her classroom, because she believes it is an essential skill. Johanna cautioned that the language of business has colonized teamwork to the detriment of people. The pressure put on team members in an organizational setup is often hierarchical and often creates an imbalance in the power structure.
Structured support. Caroline admitted that while she also incorporates teamwork in her course, often finding them very fruitful, she insists that a specific structure be set in place. She does not like the free-flowing conversations that often take place with comments not really connecting to one another and just coming in bits and pieces. Similarly, Robert claimed that much of the teamwork attempted in the adult education program is quite haphazard, usually self-selected groups, with no clear structure. Finally, Janice described herself as a facilitator of what one leading scholar calls the container of learning: By bringing structure to the environment, outside resources, outside people, the learning community, as well as food and safety, she is very much the adult education teacher.

Teaching practices. Within the co-curricular practices associated with this competency, two cases discussed ways in which they incorporated peer review groups or dissertation review groups as a way of building stronger teamwork among the students in the program. Other teaching practices mentioned include specific assignments requiring joint online discussions, joint presentations, joint papers, and joint teaching practice projects. Additionally, some of the participants discussed bringing the learning environment outside the classroom, teaming up with practitioners and participating in projects that are ongoing outside academia.

Empowering others. Two themes emerged from the data regarding the theme of empowering others: (a) helping students to claim their own power in the classroom and (b) teaching practices.

Student-claimed power. Discussions surrounding this competency generated some of the most passionate dialogue in the entire study. Karsten, for example, linked
the idea of empowerment to deeper questions of the role of leadership in society. His stance was that a leader was someone who offered space, structure, and influence, stimulating an atmosphere or culture where people feel as if they have the possibility to make their own contributions, thereby empowering them. Many of the participants in the study offered ideas regarding how to fulfill this theme of helping students to claim their own power. For example, students have to be made aware that they have power. Janet in Italy explained that this is very difficult in her institution, because the organizational culture is such that the students should not worry about power. She said she was the first in her department to introduce the idea of Brookfield’s sense of power and how power moves around the classroom. Just to talk about a participatory approach was astonishing to her Italian colleagues. Meanwhile, Frederic in Ireland said empowering others was absolutely fundamental for adult education, although he defined it as “negotiating the meaning of education all the time. You empower people by relativizing your own power, by relativizing and opening up the criticism, the idea of set or given knowledges. It is a constant dialectical process” [FC TL: 251-254].

Similarly, many of the participants talked about the necessity to create an environment where the students can empower themselves. The development of a strong learning community, mentoring, and advising the students through their studies all help to accomplish this goal. Lynn said she helps to empower her students by respecting them; similarly Gregory emphasized the importance of recognizing the skills and abilities of his students as a way of increasing a sense of empowerment. A more practical application of this construct came from Rachel who discussed the power her students have in determining their own grade: “You earn your grade is what I say. You
can get any grade you want. Everybody can get an A. I want you all to get an A. Everybody can earn an A. It's in your hands” [RM TL: 187-188].

Teaching practices. Specific teaching practices also emerged to help develop this competency. Joyce emphasized the step-by-step method she helps students prepare their writing for the publication process. She also described empowerment in terms of the detailed discussions and reflections that occur following teaching presentations, and the empowerment gained from the students' increased skills and knowledge in their profession. Similarly, Barbara described a project where students are required to go out into the community to interview program leaders. Again, the step-by-step approach towards discussions, readings, and application of new knowledge in the field helped her students reach a level of self-confidence they had never experienced before. This increase in confidence is also manifested in the ways in which some of the participants support their students through conference attendances, assignment of leadership roles in online learning communities, and personal research. The dissertation process itself, in the end, creates an amazing sense of empowerment for the student, and the role of the faculty is to help provide the space for that success to manifest.

Business and organizational acumen. The competencies associated with the category business and organizational acumen were described by most of the participants in this study as important, but there were some very specific caveats and reservations regarding the application of business vocabulary to the field of adult education. On one hand, none of the participants denied the value of possessing competencies related to this category as their students move into their individual career
paths. However, there was also a hesitancy towards bringing the world of adult education into a discourse of this nature. As Johanna described, this process brings some very good ideas into the service of a particular way of looking at the world. Frederic said there is a real danger in mistranslating the vocabulary associated with this category into the fundamental aspects of adult education, and that precision regarding the definitions of these terms and what are behind the terms are paramount. Also, a few of the participants noted that faculty are often just not set up to teach at this broader level. Rachel commented on the organizational restrictions: "We’re not allowed to teach them the stuff that would cross over to the MBA program. // That’s interesting" [RM TL: 202]. Janet said, “This is a really big thing you are asking me, because I don’t think we are working enough in this area" [JC TL: 295].

**Vision and strategic thinking.** Five themes emerged from the data regarding the competency of vision and strategic thinking: (a) pragmatic for career in adult education, (b) teaching of theory only, (c) neo-liberal economic perspective, (d) programmatic visioning, and (e) teaching practices.

**Pragmatic for career in adult education.** The different cases in the study each focused on unique variations while describing this competency. The institution in Germany, for example, was very enthusiastic about this competency. Karsten said strategic thinking was pragmatic and essential for many working conditions of adult educators in Germany. He said it is important for students to understand what adult education in Germany really is all about if they are going to be program planners or work in human resource management, whether their own contributions would be coming from an academic background or a practitioner background.
Teaching of theory only. On the other hand, Janet said the institutions in Italy do not develop strategic thinking at the student level. The rigid structure of the higher education system does not allow the student to develop any kind of personal vision for their career because the only focus of the program is to teach theory only. Janet said, “We are not developing strategic thinking so we are not putting them in . . . the process of thinking for themselves for their future, their future job, future situations” [JC TL: 323-325]. Most students who are working in the field of education in Italy are underpaid and dissatisfied, and very few will be able to get a good job related to the degree obtained. Fortunately, she has seen some improvement. There is a six-month course related to organizational development which will help to develop some of these competencies, and a national project from Naples, which is trying to improve the state of education in Italy, has recently included the student voice in the evaluation process. So improvement is occurring in terms of research, but not yet in practice.

Neo-liberal economics. The participants from Ireland, on the other hand, emphasized the continuum of this competency from the categories beforehand as a potential trap. The social lives of the populace has been dragged into a neo-liberal economy which not only caused the financial crisis of 2008, but as a model does not seem to be questioned by those in power. The intense austerity that has occurred in Ireland in recent years have resulted in the suffering of the poorest of the poor, the “squeezed middle” [JT TL: 252] discussed by Johanna in her narrative. Johanna spoke longingly for the idea of returning to a holistic approach to lives, where a job is just one aspect of a rich and vibrant contribution to society. She said if we begin to look at life and the future while focused on a sense of economics, then she fears for the field of
adult education should it go down that road globally. Frederic added that in a complex, modern society, no medium-term activities would be possible without vision and strategic thinking. A vision of what is valuable in the here and now and what can be taken from the past can lead to the kind of change for the future. Otherwise, the only result given the complex drivers and forces in control would be atrophy.

*Programmatic visioning.* The data collected from the institutions located in the United States produced conversations more focused on the adult education graduate programs and the students themselves. Gregory and Rachel discussed the expansion of the adult education graduate program to include two new master degree programs with specializations in English as a second language and cooperative extension.

*Teaching practices.* Robert and Joyce discussed the ways in which vision and strategic thinking is addressed within specific courses taught in the graduate program. Joyce described in detail specific strategies she employed in her coursework, including the development of research agendas, projects to build business plans in adult education, sequencing of courses to prepare adult education students for the doctoral process, development of documentation such as work philosophy, portfolios, career path plans, and career development instruments. Similarly, Lynn discussed the program-long process of research and vita building to help students achieve their envisioned career path.

*Leading change.* Three themes emerged from the data regarding the competency of leading change: (a) change as a fundamental human capacity, (b) assessing student change through continuous reflection, and (c) teaching practices.
**Fundamental human capacity.** Elaine said, change is “the engine of the life” [EC TL: 43]. Change is movement toward progress and must be an active component of the student experience. Johanna discussed the dynamic aspect of all living things, expounding that people can either design the future or have it designed for them. Being able to combine the previous competency of vision with the intentional aspect of leading change is hugely important. According to Frederic, change in terms of tapping into the fundamental human capacity for critical thinking and curiosity is fundamental. Any change of any kind, according to Gregory, requires a certain amount of risk and willingness to stand up and be counted.

**Continuous reflection.** With regards to the changes occurring in the student throughout his or her time in the program, Lynn commented that the change she has seen is astronomical. She specifically mentioned her international students, who manage to break through cultural and language barriers and thrive, becoming professionals in the field who can hold their own with anyone. Robert described students who recently entered the program as “bright-eyed, busy-tailed, highly intelligent [people who] get beaten, unmercifully, until [their] brain is mush” [RW TL: 316-318], and then the process of development as a successful student begins. Both Karsten and Joyce said measuring that change in the student along the way is accomplished through the personal relationships between the professor and the student. Departmental sponsored events which bring together the students and professors in a more social, less stressful environment is another way of building those kind of relationships. Joyce discussed perspective transformations that take place throughout the student’s career in the department.
Buell talked about the challenge of implementing change in the adult education department. Some faculty members encourage and will fight for maintaining the status quo. Making changes to the curriculum structure of the department is a challenge, but if faculty want to be a part of change leadership, they cannot continuously hang on to the way things have always been. Rachel described change as the purpose of the program. It is not just a piece of paper, but she was uncertain as to how the assessment of change can be articulated other than through the expectations and relationships developed between the student and the professor.

*Teaching practices.* Specific teaching practices include step-by-step progress towards development into competent researchers, culminating in the completion of the dissertation; discussions of leadership and historical contexts, such as Deming’s Six-Sigma and consultancy development; and step-by-step developmental writing in online courses.

*Business savvy.* Three themes emerged from the data regarding the competency of business savvy: (a) criticism of using business model for adult education graduate program, (b) issues in the adult education program, and (c) teaching practices.

*Criticism of using a business model.* Frederic said there are things he sees on a day-to-day basis in the department and in the field of adult education in general that indicates a demand for business savvy, and while there is nothing inherently wrong with that, he believes it is a mistake to view business savvy as the driving logic of what education is or should be. Gregory concurred, explaining that there are certain business principles such as goal setting, identification of resources, and the implementation of those resources which are very important to success. However, he
does not propose running an academic program on a business model. A business model is there to make a profit: Without the profit, the business goes away. The underlying question, then, is what is the profit in education? The sheer breadth of the field, the variety of the student background, the extensive range of research in adult education make this a very difficult question to answer. Janet in Italy expanded that thought, saying that many other professions do not have this issue. A medical doctor, for example, can explain what his field looks like. Explaining the field of adult education is not the easiest task to perform. Johanna discussed how society used to be a knowledge society, but that has been lost because of the way business has colonized knowledge, and the responsibility of professionals in the field of adult education is to reclaim that knowledge.

Issues in adult education programs. Part of the difficulty with this is the level of business competence among the faculty in adult education graduate programs. Karsten in Germany said there just is not enough time to cover all of these kinds of areas in addition to the theory and practical skills building associated with the field of adult education. Not only is there just not enough qualified faculty, but there is also a question of what level of competency should be required at the master’s or doctorate level, when this knowledge is constantly shifting and can better be learned once a student has entered the workforce. One exception to this line of thought came from Robert and Joyce at AESU. Both of these faculty members have a strong business background, and the program itself focuses heavily on human resource development; so some of the issues raised by faculty at other institutions were less discussed by the participants in this case. However, across all cases, the participants recognized a need
for a certain acumen with regards to knowing how to keep programs alive, how to find funding, how to implement the resources, and as Buell said, “Make it impossible to get rid of the program” [BU TL: 254].

*Teaching practices.* Specific practices which were discussed to help develop the competency of business savvy included inviting practitioners and alumni into the classrooms in order to discuss what it is like in the world outside academia, specific projects in program planning and career development, emphasizing technology in the classroom and assessment options, embedded program-wide professional development, especially for those who want to continue as a professor; and finally incorporate career development planning in the acquisition of research grants and research agendas to help students move beyond school into the global workforce.

*Organizational savvy.* Three themes emerged from the data regarding the competency of organizational savvy: (a) knowledge of adult education institutions, (b) student knowledge requirements, and (c) teaching practices.

*Knowledge of adult education institutions.* The participants in the study provided wide-ranging comments regarding this competency. Some focused on the organizational structures prominent in their region, while others focused on the responsibilities of adult education educators to prepare students for the nuances and undisclosed policies of entering the workforce in this industry. For example, Caroline discussed the process of institutionalization in Germany, and the positive connotation in which this term is utilized in the country. She spoke about a colleague who had carried out a research project in *Volkshochschule* (the German adult education institute) and other fields of adult education, such as faith-based programs, and the significant
differences in the organization and financial structure that existed depending on the institution. The kind of theory building, which is a result of this research, is a way of expressing what a program is really like, and Caroline said this is what is taught in the classroom. There may be those who define themselves as managers of educational institutions or program planners, and in the process of defining themselves, they can draw from this knowledge provided to them, really capture it, and try to develop their perception of the ways they want their careers to progress.

Johanna approached this competency with a clarification of how adult education programs fit in with larger organizations. She discussed the value of having flat organizations and flat communities, which in many ways mirror the strategies explored in the field of adult education, but the reality is that outside the little circle of adult educators making organizational plans would be the president of the organization and other key stakeholders sending up smoke signals obscuring what educators are really trying to do, and creating the envisioned model under which educators have to work.

Frederic stated that strategy demands ethics, and the key to organizational savvy is knowing when to listen. Trickle-down education is required to be organized within and across communities, and part of organizing is educating the educator. Educators have to know when to be quiet, sit back, and develop a propensity for people to do self-management. Whether formal or informal, adult education educators hopefully have studied these things and been involved in the practice of understanding how organizational politics really work in the community.

*Student knowledge requirements.* According to a number of the participants in this study, organizational savvy is what the students need to understand now.
Questions such as how one fits in and what one does must be addressed, because there is no textbook for that. The relationships that need to be developed with peers, with supervisors, and with subordinates need to be fostered proactively if one is going to survive and excel at an organization. The students need to learn how to have their finger on the pulse of everything going on around them.

*Teaching practices.* Karsten also recognized the importance of helping students understand how to develop organizational savvy. Regarding the theme of teaching practices, he said he tries to go further than just reading about organizational theory and literature. He provides his students with a representative organization to discuss questions such as how the organization works, who are the people in the background, who the important stakeholders are, what the official and hidden rules are, and how people act within these roles. He discusses the differences students will experience between the hierarchical structures of real-world organizations from the hierarchical structure of higher education. He said he tries to teach his students not to stick to the prejudices and assumptions of society, and to experience and challenge their assumptions when working with people from different organizations.

*Managing communities.* Three competencies emerged from the data regarding the competency of managing communities: (a) building communities, and (b) management in education, and (c) teaching practices.

*Building communities.* Collaboration between the students and among the faculty is important. Elaine in Italy stated it has to be more than institutional. The students must actively take part. Janet, likewise, said managing communities is not encouraged much at the Italian institution. She is really trying to change this. She has
been attempting to build bridges between the different department at GIU and student experiences from different faculties. In the age of Facebook, Twitter, and other social media, she is surprised by how little of this kind of community building is taking place in the university these days.

Management in education. Still other participants focused in on the management aspect of this competency. Johanna said a lot can be learned from management and there are, in fact, many management theories which are very good; especially those which focus on the human qualities under review here and allow for a broader overview of where leadership stands and where the community wants to go. Frederic brought the conversation back to the idea of self-management, however. He said as a faculty member, he is not there to manage; his role is to interact with people, to hope in a sense of what it means to flourish in this world, and what it means to be critical, what it means to have a good life. He believes his role is to help students understand what it is that is stopping them from achieving this good life, and that kind of self-management is fundamental to the way he sees his role as a professor of adult education.

Teaching practices. More than any other competency, most of the participants were able to immediately provide examples of teaching practices associated with this competency. These included involving guest speakers and practitioners in the classroom in order to engage the students with the greater adult education community, encouragement to attend and present together at local, national, and international conferences; and classroom collaboration involving working with scholars on publication assignments. Additional teaching and program practices which emerged include volunteer activities, classroom exercise using Schroeder’s Typology in a selected city,
and bringing together the doctoral students into a kind of learning community and peer support group.

**Other identified competencies.** The following competencies emerged from the data as worthy of discussion in connection with global leadership competency development within adult education programs. After completing the discussions of all 15 competencies associated with Bird’s (2013) framework of nested global leadership competencies, the participants were asked if there were any competencies missing from the discussion, any competencies that were not included in the model used in the development of the interview protocol which they would like to add with regards to global leadership competencies in adult education graduate programs. The following additional competencies emerged from the data:

- **Mission.** In the conversation regarding vision and strategic thinking, Buell mentioned mission as a missing element. Mission building is often a part of a curriculum unit and departmental element in which he is involved at his institution. Buell said this is very important for an adult education department because the Deans and Provost are looking for this from their departments. The departmental mission statement should be updated on a yearly basis as a living document.

- **Discipline.** Gregory asked where one finds discipline in the leadership lexicon. Military manuals are filled with references to discipline, but due to anti-military bias and the failure to look at the leadership successes of people in the military, there has been a total misunderstanding of military leadership. The word discipline seems to be lost in the academic
literature. Gregory said it just is not found to be that interesting to scholars or emphasized enough in the graduate programs. It takes discipline to succeed as a student. Managing time and resources are much more challenging than learning content.

- Technology. Although addressed briefly in the competency of business savvy, Barbara discussed in great lengths the emphasis she places on the competency of using technology in preparation for entering the global workforce. These skills are learned concurrently within the context of her classes, and students often are reticent about developing these skills. They often declare to her that this is not a technology course, to which Barbara responds of course not, but it is an adult education course. And these are tools that everyone uses in the real world. If one goes to work in a company and is unable to work with modern technology, he or she will not succeed. If one wants to market a program and not use social media, the target audience will never be reached. Short-video trainings and embedded discussions help the students to become more competent quickly, and no matter where one works, this competency will definitely benefit the learner.

- Social justice. Stories of social justice initiatives facilitated dialogue about empowerment and valuing others. Four participants mentioned this theme. Janice said she understands it can be built into all aspects of the curriculum, but if this framework is used in a business setting, this point of view may not be emphasized enough. Janice also mentioned the
accounting tool known as the triple bottom line, where the profit margin, environmental impact, and the sustainability of life and wage and fairness are evaluated. She said this needs to be a part of the conversation, because this is the kind of support for the bridge between the worlds of business and education which bring into life the notion of human resources, natural resources, and profit.

**Research Question 2: Perceived Importance of the Global Leadership Competencies in the Adult Education Graduate Programs**

The second research question addressed which global leadership competencies were perceived to be the most important, or less important, by the participants selected for this study. To answer this question, a ranking analysis of the interview transcripts was conducted and compared to the rank order each participant provided during the course of the interview. The participants were asked to rank order the competencies based on the three broad categories detailed in Bird’s (2013) framework of nested global leadership competencies. Those three broad categories were (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen.

Table 16 provides an overview of the rank order for each participant for each of the three categories. A rank of “1” indicates that competency was perceived to be the most important. A rank of “5” indicates that competency was perceived to be less important.

- For the category of managing self, inquisitiveness and global mindset were perceived to be most important across all seven cases, while flexibility and resilience were ranked as less important.
- For the category of managing people and relationships, valuing people was ranked as the most important across all seven cases, while cross-cultural communications and empowering others ranked as less important.

- Finally, for the category business and organizational acumen, vision and strategic thinking and leading change ranked as most important across all seven cases, while business savvy ranked as less important.

Table 17 provides a frequency distribution of how many times each competency was ranked at each interval. Combining the competencies with the highest combined rank of numbers one and two across all three categories and all seven cases, the following competencies can be said to be perceived as the most important according to the findings in this study:

- Valuing people
- Inquisitiveness
- Vision and strategic thinking
- Leading change.

With respect to the lower ranking competencies across all three categories and all seven cases, the following competencies can be said to be perceived as less important according to the findings in this study:

- Business savvy
- Resilience
- Cross-cultural communication
- Organizational savvy
- Empowering others.
Table 16

Overview of Rank Order of Each Participant by Category

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301
Research Question 3: Identified Curricular and Co-curricular Practices to Develop Global Leadership Competencies

The third research question addressed the practices associated with the development of each of these competencies in the selected adult education graduate programs in the United States and Western Europe. A comprehensive iterative analysis of the data across all seven cases was conducted. Eleven themes describing the most commonly discussed practices emerged in two categories each: (a) curricular (within the classroom) practices and (b) co-curricular (programmatic) practices. This section briefly discusses each theme. Table 18 presents an overview of the practices which emerged from the data.

### Table 17

*Frequency Distribution of Ranking of All 15 Competencies by Category*

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<tr>
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<td>1</td>
<td>3</td>
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</tbody>
</table>
Table 18

Overview of Emergent Themes Describing Practices from Curricular and Co-curricular Categories Presented in Rank Order of Word Count

<table>
<thead>
<tr>
<th>Curricular (In Classroom) Themes</th>
<th>Co-Curricular (Programmatic) Themes</th>
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<tbody>
<tr>
<td>Embedded discussions</td>
<td>Develop research agenda</td>
</tr>
<tr>
<td>Writing exercises</td>
<td>Provide specific courses</td>
</tr>
<tr>
<td>Selection of readings/texts</td>
<td>Encourage attendance at conferences</td>
</tr>
<tr>
<td>Targeted assignments</td>
<td>Engage in mentoring/advising/shadowing</td>
</tr>
<tr>
<td>Presentations</td>
<td>Accept more international students</td>
</tr>
<tr>
<td>Teamwork</td>
<td>Expand study abroad opportunities</td>
</tr>
<tr>
<td>Self-directed learning</td>
<td>Promote learning communities</td>
</tr>
<tr>
<td>Online learning</td>
<td>Coordinate alumni support</td>
</tr>
<tr>
<td>Personalized projects</td>
<td>Offer professional development opportunities</td>
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<tr>
<td>Use of guest speakers</td>
<td>Encourage volunteering/campus involvement</td>
</tr>
<tr>
<td>Innovative use of technology</td>
<td>Awareness at admissions</td>
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</table>

Curricular Themes. The following 11 themes were identified from the data across all seven cases (14 interviews) as the reported curricular practices to develop global leadership competencies in the classrooms of selected adult education graduate programs in the United States and Western Europe.

Embedded discussions. Each of the 14 participants across all of the global leadership categories reported they incorporate the competencies under inquiry into the classroom discussion. The key to awareness is discourse, and the adult education professors in this study all embed these competencies into their curriculum through conversation and dialogue. Whether it is discussions about a global society, or learning teaching strategies to empower students, the participants in this study infuse challenging dialogues related to the issues important to the field of adult education at all levels of graduate study. A discussion about race may lead to talking about other
groups in society, which leads to awareness about the Latino culture or the gay and lesbian community; and people in the classes who are part of those communities may contribute specific examples to that dialogue. Social justice, disenfranchised populations, international travel, cultural competence, ethical dilemmas are all examples which emerged from the data as topics of conversation throughout the curriculum. Raising awareness of issues and keeping them open for discussion is the most common practice identified in the data for the development of the global leadership competencies under inquiry.

**Writing exercises.** Writing is a fundamental skill for any graduate student. Taking the form of dissertations, book reviews, book chapters, grant proposals, conference proposals, articles, and papers for class, the professors in this study use writing as a way to deepen the student’s levels of knowledge and critical thinking with regards to the issues associated with the global leadership competencies discussed in this study. Joyce uses writing as a way of empowering her students. If a paper has been assigned, she designs the paper requirements around conference guidelines. She offers as much feedback as possible. She pushes her students to produce the best manuscript possible, then allows them the option to submit it for publication or not. She teaches the process step-by-step, from purpose statement to final product. Lynn reported a similar procedure when teaching her students how to write a dissertation. Admittedly, this takes a lot of time, but it also generates some of the greatest rewards. Many of the participants described the sense of pride they feel when a student’s work has been accepted for publication. Joyce added she firmly believes a lot of knowledge
is lost when professors do not encourage their students to write and publish and access that system.

**Selection of readings/texts.** Similar to embedded discussions, development of most of the global leadership competencies discussed in this study can be represented in the classroom through the selection of texts. The introduction of international research articles was a common theme which emerged from the data to help students expand their global mindset. Case studies of ethical dilemmas help develop character. Stories of social justice initiatives facilitate dialogue about empowerment and valuing others. Evaluations and program planning initiatives highlight the need for increased business and organizational savvy. The selection of texts is a way to stay relevant and up-to-date on the issues, as well as allow for the kind of flexibility in dialogue which keeps the curriculum fresh and enlivening.

**Targeted assignments.** Along the same lines as embedded discussions and selection of texts, the participants in this study have much leeway with regards to the assignments they can require in their classroom. Here are a few specific examples from the data.

Discussing the competency of managing communities, Rachel described an assignment where she requires her students to select a city or town of their choice, then using Schroeder’s Typology as a reference, they are to locate five examples of adult education institutions within each category. Discussing the competency of global mindset, Lynn described an exercise where she requires her students to bring in a cultural quiz of at least 10 questions related to their cultural heritage. The entire class then takes the quizzes and reviews them in class. It is not only a great ice-breaker
exercise, but expands cultural competency among the students. Another example from Lynn is her use of Rokeach’s instrumental and terminal values survey to encourage discussion of values and self-reflection.

Discussing vision and strategic thinking, Barbara described all of her assignments as a program with one assignment leading to another. For example, in the Learning Theory course, the first assignment is about the literature review. Grading the assignment, she can tell who learned the objectives well and who did not, and she can give suggestions. The next assignment is to identify an adult education program related to the theory. Again, if the student was not able to do the second assignment correctly, she knows they did not learn from her feedback. Using this step-by-step progressive method, she can return to the point in time when there was a gap in the student’s learning. For the final assignment, the students bring all they have learned together into a final demonstration to verify their understanding of how the theory works.

Assignments associated with interviewing leaders in adult education support the development of interpersonal skills and managing communities. The use of curriculum tools such as Brookfield’s Critical Incident Questionnaire (CIQ) as well as his 11 questions for journaling about emotional responses to learning are ways of looking at the themes and trends over student writing for the length of the semester. Regarding these tools, Janice stated the value of these kinds of assignments includes increased insight and they allow her to get to know the students a lot better than just face-to-face interaction.

**Presentations.** In order to convey learning for assessment purposes, presentations emerged as one of the most common practices by the majority of the
participants in the study. The topics, courses, and modules are as wide as the field of adult education itself, but the purpose is clear—to demonstrate competency in whatever subject matter is being taught. Robert provides a guide he calls “15 things I’d like to see in a good presentation” [RW TL: 133]. When a student conducts a presentation, everyone in the class anonymously completes this guide. If the student was unsuccessful, he or she (or the group) gets another chance. It is designed to build competence and confidence. Robert describes that as “walking the talk with adult education” [RW TL: 145]. It is about confidence building, and it is a tool they can use for the rest of their time as a graduate student.

**Teamwork.** The development of teaming skills emerged from the findings as one of the most common practices in classroom management. As Caroline stated, the students do it all the time, but they do not always like it. Adult students are often reticent to work with others, and to put any kind of control over their own grade and learning experience into the hands of someone else. However, examples of students forming teams to accomplish some part of the curricular requirement permeated the data. Caroline also described a noteworthy practice in which she conducted team discussions in an online environment within her classroom. She said she did not like those conversations where everyone says just bits and pieces of some topic which does not really relate to the previous comment. The students just do not really get as much out of the text or material presented in class with these kind of free conversations. So she requires the students to deeply go through the material and identify the key points, discussing and presenting each of the key points to the team, and then outward to the
fellow students. She said this has been very fruitful and the students always produce fascinating results.

**Self-directed learning.** A number of the participants in the study discussed the idea of choice and personal selections with regards to all aspects of the curriculum. Research projects, presentations, conference attendance, internships, book reviews, and individualized or group work all emerged as ways in which the student is given power to select their own areas of interest or research. Robert also discussed his willingness to negotiate assessment—essay questions, multiple-choice, short answer, long answer, oral presentations; he is open to all manners of assessment. His only concern was that the learning was taking place. Johanna talked about passion, and how students must be able to choose their own research agendas in order to break through the natural barriers that occur during the graduate school process. Gregory and Rachel both reflected on the openness they have discovered in learning to be more flexible with regards to due dates and assignments. According to Robert, it is all about the learning.

**Online learning.** Not all of the participants in the study fully supported the trend towards online learning, but all of them acknowledged the reality that this is where much of the learning in the field of adult education is now taking place. Many of the participants discussed the challenges and successes they have encountered in the transition to online learning. Some of the professors teach exclusively online, while others are still moving towards that learning environment. Lynn commented that younger faculty with stronger skills in developing effective online learning experiences are required in many adult education programs. Janet in Italy discussed the hesitance
her students portray toward trying to communicate this way, since it is so different from the traditional teacher-centered approach they are used to. Rachel talked about the use of student moderators as a technique to help build leadership and empowerment within the online platform. Online learning emerged as a recognized tool in the development of global teams and in the expansion of programs which can now reach students who were previously unable to participate in the program due to distance and access.

**Personalized projects.** Many of the participants discussed projects as a way in which to bring the curriculum outside the classroom. Student-led projects such as youth development, literacy program development, and pro-choice awareness, just to name a few, are examples of the students taking what they have learned and applying it to the field of adult education beyond the institution of higher education. Often, these projects are completed in conjunction with Internships, but sometimes they are simply assignments within a given class. Two specific examples are provided here.

Barbara discussed a project in the Adult Learning Theories course where she asked her students to deeply explore adult education institutions at either the local or international level. She asked her students to investigate which theories and frameworks were used to design the program in order to better understand how theory can be turned into practical contexts. While most students chose local organizations, one student chose an institution in Australia whose leaders used transformative learning to design their program. He contacted the leaders of that organization, interviewed them, and later designed a program of his own based on the knowledge he gained from the Australian model. The leaders in Australia were so happy with the experience, they wanted to collaborate with him on future projects.
Another specific example of using a project as a way of putting new knowledge into action was provided by Joyce. In a course focused on Organizational Community Processes, she put the class into groups whose projects are to create an organization which is designed to solve some problem in the community. The students have to identify the problem and the solution and build a business plan in which to form this organization. It must include the vision, detailed plans, and funding requirements in order to prepare for writing a grant. It is a focus on strategic planning that develops multiple global leadership competencies, such as managing communities, vision and strategic thinking, teaming skills, business savvy, organizational savvy, flexibility, character, cross-cultural communication, and interpersonal skills. Some of the students take their projects and turn them into real entities.

**Use of guest speakers.** Guest speakers are one way to bring the practical world of adult education into the classroom. Rachel has used guest lecturers to talk about prisoner education as well as mental illness issues in the community. She said these speakers have so much more to add to the discussion than she could alone as the instructor. When possible, she encourages her students to become more involved with the guest speakers in order to expand their networking skills and research interests. In Germany, Karsten spoke about guest speakers he brought into the classroom from the Volkshochschule (adult education center) to discuss program planning, as well as someone from a big car manufacturing enterprise. He said the students expected two totally different contexts with regards to the working environment and program planning, but there was much more similarity in the work experiences than anyone anticipated. Finally, Frederic in Ireland spoke about how his students could
utilize this practice when they take control of a given topic. He has had students bring in guest speakers themselves to great success in order to elucidate on a given topic for which they were responsible to present.

**Innovative use of technology.** The use of technology is embedded throughout the curriculum. Barbara discussed how she emphasizes curriculum in the classroom. The tools are learned simultaneously while her students do the assignments, because they are required to complete the assignments. In an online context, the traditional method is to simply post on the discussion board and respond to two or three other students. In order to regain a personal touch, Barbara requires her students to use the voice control to respond to their peers. Besides voice recordings, she uses blogs to summarize accomplishments each month and to discuss the plan for the coming month. It is a very manageable process, though she admitted that many students resist using these tools. When the students ask why they have to use so many technology tools in a non-technology course, Barbara explains to them the ways in which these tools are used in the workforce; for example, marketing a program without social media will not engender much success. Technology is embedded everywhere. She provides short video tutorials to explain the step-by-step procedures for learning how to use each new tool, and after one semester with her, she believes her students have increased their competency in this area immensely.

**Co-curricular themes.** The following 11 themes were identified from the data across all seven cases (14 interviews) as the reported co-curricular practices to develop global leadership competencies at the departmental level in selected adult education graduate programs in the United States and Western Europe.
**Develop research agenda.** The development of the students’ research agenda is one of the most important aspects of their time in the graduate program. The role of the advisor is instrumental in this endeavor. Gregory discussed the importance of helping his students develop multiple strands of research. Joyce develops her entire teaching philosophy on supporting her students become the best researchers they possibly can. Research begins with papers for classroom assignments, but also includes book reviews, articles, conference proposals and presentations, grant writing, and, of course, the student’s dissertation. The institutions in both the United States and Western Europe equally emphasized the development of the research agenda for their students. In Germany, because of the large international student population, particularly from Turkey, Karsten allows his students to produce research in his students’ native language as a way of encouraging cross-cultural communication and sustaining their passion. As Joyce stated, “I consider writing as a way of knowing and how we’ve learned” [JK TL: 28]. It is a way of taking what you have learned and turning it into something else.

**Provide specific courses.** The list of courses which were specifically mentioned in the presentation of the data was exhaustive. The development of the global leadership competencies associated with this study can take place within a myriad of courses and modules throughout the adult education graduate program. The competencies of the category managing self permeate all areas of the curriculum, from courses on micro-didactics and counseling to human resource development and foundational courses in adult education. Only one program in the study had a course
specifically directed towards International Adult Education, although it was mentioned as a desired course from participants at three other institutions.

The most mentioned course throughout the entire study was Internship. This aspect of the adult education program emerged from conversations regarding character, business savvy, organizational savvy, managing community, inquisitiveness, resilience, empowering others, and leading change. Internships provide opportunities to work in the community, to gain real-world experience, and to begin making their own choices with regards to their research agenda. Karsten described it as throwing students out to take what they have learned and negotiate their role with some prospective organization. The students go out and they build: They might put together a training program for someone, put something online for an organization, or many other possibilities. They have to be ready for some constructive criticism of their work both from an academic perspective as well as a practitioner perspective. They experience the challenges of working in the field and often begin to see how organizational development differs from what they have learned in the classroom.

**Encourage attendance at conferences.** Professional conferences provide multiple opportunities to develop global leadership skills. The theme of conference attendance and presenting at conferences emerged from the data with regards to the competencies of managing communities, empowering others, vision and strategic thinking, inquisitiveness, business savvy, and global mindset. The participants in the study encourage their students to attend as many conferences as possible, even if they are not presenting. Specific classroom exercises are designed to prepare proposals for conferences and the students are strongly encouraged to submit, often working together
in groups. Conferences provide the opportunity to interact with peers from other institutions, meet scholars in the field, and make contacts with other adult education professionals. It helps them to think critically about their own research agendas, to ask questions, and continue the dialogue around self-knowledge.

**Engage in mentoring/advising/shadowing.** Mentoring for adult education professors is an integral, daily part of their profession. Some of the institutions reported having formal mentoring programs, with regular check-in and status reports, advising sessions, and professional development aspects along the graduate school journey. However, for most of the participants, mentoring and advising is conducted on a more informal basis, occurring when requested by the student or when the need is recognized by the faculty member. While sometimes the mentoring and advising revolves around academic issues, oftentimes it is a part of helping students learn resilience and dealing with the stress and anxieties of being a graduate student.

**Accept more international students.** Eight of the 14 participants mentioned the increase of international students within their adult education programs as a primary source of dialogue in a global context. Institutional support from the universities is an important contributor to this increase in international students in graduate programs. Participants reported how they and all the students learn much more about culture and history as a result of the one-on-one interactions with international students. Faculty members also become much more sensitive to the vocabulary and colloquial use of language when communicating cross-culturally. The international students themselves undergo a huge transformation, often coming into the program as shy, meek speakers, then blossom with confidence in the field of adult education. Another participant in the
study encouraged adult education programs to accept international students from as many languages and cultures as possible. Only one participant in the study discussed some of the challenges associated with this practice. Barbara said that the success and talent level of many international students often generate a sense of threat to the local students who feel that they will either not be able to compete in the workforce after graduation. Still, she believed this pushed the local students to strive even harder to become the best students possible.

**Expand study abroad.** Five participants discussed the value of study abroad in the development of competencies such as global mindset, cross-cultural communication, inquisitiveness, flexibility, and interpersonal skills. The caveat is that study abroad needs to be disciplined, appropriately designed and thought out, and not just a vacation for the student. According to the participants, it is actually very difficult to achieve given the time and financial restrictions of many adult education graduate programs. Those participants who have undertaken this practice, however, reported that it was an incredibly rewarding experience for both the faculty and the students.

**Promote learning communities.** In addition to the learning communities which take place in the classroom, learning communities can also exist in the program. This can take the form of peer support groups, dissertation support groups, organized mix-and-mingles supported by the department, or regular weekly walk-in sessions with the faculty advisor. Once students enter dissertation stage, this form of learning community is often the only opportunity students have to interact with each other on a regular basis, to share experiences of the dissertation process, and to support each other on the way to completion of the program.
**Coordinate alumni support.** Karsten talked about a program at his institution where he is inviting practitioners who have graduated from the program back into the courses in order to share their experiences in the field. He said it is important for students to learn more about the practices post-graduation. Similarly, Johanna spoke about the importance of having graduates of the program return to speak with the students who are just starting. She said she would have failed as a professor if the new Ph.D. graduates would not agree to do this, because they in their turn were welcomed in when they were first year students and supported along the way. She said they really do live in each other’s shadows, and that is an important part of her job.

**Offer professional development opportunities.** Although this theme could be said to run through every other identified competency, the way in which it was used in this discussion is the preparation which professors incorporate into the adult education program to help their students’ transition to their chosen career. Specifically identified practices include allowing the students to help with teaching responsibilities, conducting research with the students, publishing with the students, and helping students build their own vita. The development of portfolios and e-portfolios was also mentioned as a way to start a storage system, a place to keep artifacts of their teaching and their knowledge, skills, and abilities, so that they have these relevant artifacts on hand when they go for an interview. Joyce said putting portfolios together really helps students with their self-confidence, because they have a tangible result of their successes in the program.

**Encourage volunteering/campus involvement.** When discussing the competency managing communities, Rachel discussed how she encourages students to get involved in campus activities in order to build stronger networks with other
students. Janice also discussed volunteer opportunities for her students in order to help them gain experience in community work. She admitted it is sometimes identified as forced outreach, but it has brought some very rich learning experiences into the program.

**Awareness at admissions.** Two of the participants discussed a few of the competencies associated with managing self, specifically resilience and inquisitiveness, at the level of admissions. Buell said one hopes the students come into the program with some level of competence in these personal dimensions. He said it was the kind of characteristic he looks for before admitting a student into the adult education program. He added that it may be possible to develop at the master's level, but it would be very difficult to do so at the level of doctoral education. Similarly, Gregory said resilience is a quality the students should come into the program having already demonstrated, though it can be reinforced during their academic career.

**Research Question 4: Identification of Similarities and Differences Among Participant Responses**

To further explore descriptions of global leadership competencies and their development in adult education graduate programs, it was important to look at the similarities and differences between the selected programs located geographically in the United States and those in Western Europe.

Table 19 shows the frequency distribution of all 15 competencies, separated by the three categories of (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen, across all four cases located geographically in the United States. Table 20 shows the same frequency distribution across the three cases located geographically in Western Europe.
A review of the findings indicates the four competencies with the highest total of combined number 1 and number 2 rankings across both geographical regions are the same four competencies, though in slightly different order. The five competencies perceived highest in importance across the four cases located in the United States were (a) valuing people, (b) inquisitiveness, (c) vision and strategic thinking, (d) leading change, and (e) interpersonal skills. The five highest competencies across the three cases located geographically in Western Europe were (a) leading change, (b) valuing people, (c) vision and strategic thinking, (d) inquisitiveness, and (e) character. See Figure 5 for an overview of these findings.

Table 19

*Frequency Distribution of Ranking by Category of All 15 Competencies for the Four Cases Located Geographically in the United States*

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<td><strong>Managing Self</strong></td>
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<tr>
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</tr>
<tr>
<td>- Flexibility</td>
<td>2</td>
<td>1</td>
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<td>- Character</td>
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The findings indicated only two of the global leadership competencies with a combined ranking of numbers four and five were the same across both geographical regions. Those two global leadership competencies were business savvy and cross-cultural communication. One of the global leadership competencies, character, ranked among the five competencies perceived to be less important by the participants located in the United States, yet was among the five competencies perceived to be most important by the participants located in Western Europe. One of the participants who had ranked it lowest felt it was the one competency over which she had the least control. The five global leadership competencies perceived lower in importance with
regards to how they are addressed in the adult education graduate program across the four cases located in the United States were (a) empowering others, (b) resilience, (c) character, (d) business savvy, and (e) cross-cultural communications. The five global leadership competencies perceived to be less important across the three cases located geographically in Western Europe were (a) flexibility, (b) business savvy, (c) cross-cultural communication, (d) organizational savvy, and (e) teaming skills. See Figure 6 for an overview of these findings.

Differences. The qualitative analysis of this multiple case study data found more similarities in general across both geographical regions. However, the data collected from the Western European institutions all had unique findings that were unaddressed in any of the U.S.-based institutions. This section addresses the unique findings which emerged from the data regarding the three cases located geographically in Western Europe.

Institutionalization of education culture in Germany. The field of adult education in Germany is highly supported by the national and local governments. The participants in this study from Germany felt it was very important to understand the differences and complex relationships between the German adult education institutions that exist in the market, as well as the interrelation of these institutions with initiatives and smaller associations and social groups. This concept of institutionalization of education culture in Germany is seen by educators and the general population as a highly valued aspect of German culture. The ways in which the institutions relate to each other, the program planning that takes place, and the complexity amidst the interactions have to be planned very carefully so that the true education needs are
known. To prepare students to work in this field of practice is the focus of the adult education graduate program in Germany.

<table>
<thead>
<tr>
<th>United States</th>
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<tr>
<td>Valuing People</td>
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<tr>
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<td>Valuing People</td>
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<td>Leading Change</td>
<td>Inquisitiveness</td>
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<tr>
<td>Interpersonal skills</td>
<td>Character</td>
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*Figure 5. Overview of the five global leadership competencies perceived most important in the selected adult education graduate program across the cases located in the United States and the cases located in Western Europe.*

The institutions are publically-funded, with the Volkshochschule (adult education center) being the largest. There are more than 900 Volkshochschulen all over Germany; nearly every city and town is connected to this adult education institution which offers single and bundled courses to its local population for modest fees and at flexible hours. This researcher was a student of the German language at the Volkshochschule while living in Dresden. Since no degree or diploma is awarded, the teaching is often freer and more informal than traditional institutions of higher education.
Other adult education institutions also exist, also publically-funded, such as faith-based institutions of adult education or institutions that are maintained by the unions. It is organized very differently in Germany compared to the United States: There is a whole range of public adult education institutions which are all subsidized by the government.

![Diagram](image)

**Figure 6.** Overview of the five global leadership competencies perceived to be less important in the selected adult education graduate program across the cases located in the United States and the cases located in Western Europe.

Traditionally, there is a strong focus on research and theory-building in the adult education graduate programs in Germany. There is much less focus on student motivation and training. This is often a concern, because sometimes the students in these adult education programs in the real world do not really want to be there. They
may be required to attend because of their job or they may have been sent by the unemployment office or other national agency for qualification work. This researcher was also an English-language instructor in one of these programs in Dresden.

There are modules which include micro-didactics, and modules which include macro-didactics. Micro-didactic modules focus on teaching methods and the settings where adult education take place. Micro-didactics focus on what is going on in the classroom and corresponds to a course in the United States on Teaching Methods for Adults, Curriculum Planning, or Instructional Design. This course ends with the students conducting an example of their teaching concept based on the research and theory-building they have learned during the course of the module. Macro-didactics, on the other hand, focuses more on program planning, and was better represented by the category in this study of business and organizational acumen. The participants from Germany admitted the focus of this one institution was more in the direction of program planning, and there may be other institutions with greater emphasis on teaching methodology. Not every program has to be all-inclusive.

**Irish passion and support.** The adult education graduate program in Ireland showed both similarities and differences with other institutions in this study. The master’s program, for example, followed a similar structure to other master programs identified in this research. Classroom instruction is performed through taught modules focused on the development of scholarly skills, intellectual skills, critical reading, critical writing, and new knowledge. There are foundational courses such as Advanced Theories of Adult Education, where scholars such as Freire and Brookfield are discussed. Then the instruction is pushed outwards into the realm of social ideas and
connections, further fragmented into the complications of the class system, gender discrimination, and many other social issues.

In the doctoral program, however, there is a lot more flexibility. Instruction in the Ph.D. program is conducted mainly through seminars. The students can still take the modules which are a part of the master’s program, especially if they did not receive their master’s degree in adult education, but in the seminars there is much more dialogue taking place about the individual goals of the learners, and how that connects to the adult education field. There is a lot of discussion and feedback along the way toward becoming highly skilled researchers and adult education professionals. Socio-political commentary dominated the conversations with both participants from Ireland. They brought into the discourse a greater emphasis on real-world application of theory and critical interpretation of what the true questions of leadership in a global context would look like. They were extremely critical of the social directions many of the mainstream political agendas were taking with regards to issues of migration, immigration, multi-cultural assimilation, and human equality. They were passionate and supportive of the study, given the reservations they both had about the use of a competency model to navigate the discussion of the phenomenon of global leadership.

**Italian professor ambivalence towards students.** Much of the data collected from the Italian case was unique from all the other cases. Whereas the participants from Germany and Ireland spoke about the support for adult education received from the governments, the Italian participants felt isolated and alone in their attempts to bring fresh innovation into the discourse at their institution. Both participants had worked extensively in English-speaking countries and with English-speaking scholars, and as a
result have tried to incorporate adult education methods and ideas into their Italian classrooms, to very limited success. Discussions about Brookfield and power and how power moves around the room was met with disdain from other Italian colleagues. Attempts at building learning communities and learner-centered teaching, getting the students to take responsibility for their own learning, was very difficult. The students are not used to this style of instruction; they simply wanted to listen to the lecturer, go through multiple PowerPoint slides, take notes, and take an exam. There is almost no focus on practice in the Italian classroom, the entire focus is on theory.

The participants in Italy were exhausted with the attitudes of their less open-minded colleagues with regards to practices such as inviting guest lecturers to the classroom (so that real-world application of learning could be discussed). Both participants were interested in expanding their teaching repertoire, but this is very difficult to do, because the professors in Italy must own their classes and areas of teaching; they possess them. They do not share, they do not partake in professional development, and they do only what is necessary for the student; because with regards to promotion, the only thing that matters is their research accomplishments. Teaching and student evaluations are not a part of the promotion process. The traditional attitude of Italian professors towards their students is one of ambivalence. The participants in the study were outliers, of course, desperately pushing against centuries of tradition in the higher education system in Italy.

**Similarities.** There were many similarities which emerged throughout the study across all seven cases. Nearly all of the participants emphasized the high quality of the students in the program. Another common theme discussed included how wonderful
and supportive the adult education community is to work with and how important it is to continue to build strong networks among this community. The participants were dedicated scholars, pushing their students to step outside their own comfort levels in their journey towards joining the tribe.

Another common theme which emerged was taking a critical look at the true questions associated with global leadership. Many of the participants questioned the idea of a competency model as the source of describing leadership. Who benefits from asking these questions? For what purpose are we defining the terms? How does it serve the populations we are trying to serve? What is it to build a general capacity for leadership? What is it to build grassroots democracy? What type of leadership is required? These kinds of questions occurred regularly throughout the interviews, challenging the notion of addressing which qualities or characteristics of a given person who is deemed to be a global leader.

Summary of Chapter

This chapter presented a discussion from the findings from the study. First, emergent themes associated with each of the 15 a priori categories across all seven cases was discussed. Next, the findings indicating which of the competencies were perceived by the participants to be most important, as well as those competencies the participants indicated were less important, were presented. Then, a discussion of the emergent practices from a curricular (in the classroom) and co-curricular (programmatic) perspective was presented. Finally, findings indicating similarities across all cases and differences among the unique cases located geographically in Western Europe were discussed.
Chapter 6

Summary, Conclusions, Implications, and Recommendations

The purpose of this study was to explore the extent to which global leadership competencies were addressed and developed in adult education graduate programs in the United States and Western Europe. The first section of this chapter presents a summary of the study. The next section discusses conclusions derived from the study. The following section presents implications of the study for faculty, administrators, and students of adult education graduate programs. Finally, some recommendations for further research are presented.

Summary

The literature review for this study summarized the progress researchers in the field of global leadership have made toward developing a construct definition. In 2008, the Commission of Professors of Adult Education (CPAE) published the *Standards for Graduate Programs in Adult Education*. These standards suggested guidelines for the planning, administration and evaluation of adult education graduate education. This study sought to expand on the connection between two specific *Standards* related to globalization and leadership, and to illustrate the gap in the literature through an examination of the phenomenon of global leadership competencies in selected adult education graduate programs in the United States and Western Europe.

In a content analysis reviewing overlapping concepts, semantic differences, and qualitatively-differentiated categories, Bird (2013) published a framework of nested
global leadership competencies which identified 15 competencies divided into three broad categories (a) managing self, (b) managing people and relationships, and (c) business and organizational acumen. This model was selected as the content domain for the development of the interview protocol used as the instrument in this study.

The exploratory questions that guided the study were:

1. Which global leadership competencies are addressed in the selected adult education graduate programs in the United States and Western Europe?

2. Which global leadership competencies are perceived to be the most important by faculty and administration of the selected adult education graduate programs in the United States and Western Europe? Similarly, which global leadership competencies are perceived to be less important by the interviewees?

3. What are the reported practices to develop global leadership competencies in the selected adult education graduate programs in the United States and Western Europe?

4. Based on the researcher’s analysis of the data, what are the similarities and differences in the development of global leadership competencies between the selected adult education graduate programs in the United States and those of Western Europe?

In order to gain multiple perspectives, a qualitative, multiple case, phenomenological study was designed. The seven cases—four in the United States and three in Western Europe—were purposively selected and helped lead to an understanding of how the phenomenon of global leadership competency development is
perceived and developed among different graduate programs and in different geographic settings.

Two current faculty members from each institution were interviewed, for a total of 14 participants. An interview protocol was developed and vetted through a multi-level panel process incorporating peers and professionals in the fields of adult education, leadership development, and research and measurement. The interview protocol was also developed with the framework of appreciative inquiry (AI) in mind.

The research questions guided an iterative analysis of the data against Bird’s (2013) framework of nested global leadership competencies. First, the data were analyzed to determine which of the a priori competencies were addressed in the selected adult education graduate programs. To differing extents, all 15 competencies were addressed by the participants. Next, the data were analyzed across all seven cases to determine which of the 15 competencies were perceived to be the most important, as well as less important, by the participants. Within the category of managing self, the competencies perceived to be most important were inquisitiveness and global mindset; within the category of managing people and relationships, the competencies valuing people and interpersonal skills were perceived as most important; and within the category of business and organizational acumen, the competencies vision and strategic thinking and leading change were perceived as most important.

The next level of analysis determined which curricular (within the classroom) and co-curricular (within the program) practices emerged to support the development of the global leadership competencies in the selected adult education graduate program. Eleven curricular and 11 co-curricular practices emerged as themes from the iterative
analysis across all seven cases. The final level of analysis explored similarities and differences between the cases located geographically in the United States and those located in Western Europe. Four of the competencies, in slightly different order, emerged as the most important competencies for the development of global leadership in adult education graduate programs in both geographical regions. Those competencies were (a) valuing people, (b) inquisitiveness, (c) leading change, and (d) vision and strategic thinking.

Conclusions

The conclusions related to this research were guided by the research questions and the researcher’s experience while conducting the study.

All of the competencies associated with Bird’s (2013) framework were addressed to some extent across all seven cases. However, the participants did not define the construct of global leadership as the researcher expected. During the course of the discussion of each competency, a gap emerged between the participants’ focus on the global angle of the study, and the leadership aspect. Most of the participants agreed that the unique nature of the field of adult education, which includes program planning, non-profit organization administration, corporate training, and human resource development, would be enhanced with more of an emphasis on leadership development. Yet, the conclusion across the study indicated there was little emphasis on any specific global leadership competency throughout the adult education programs.

The four global leadership competencies perceived to be most important across all seven cases were (a) valuing people, (b) inquisitiveness, (c) leading change, and (d) vision and strategic thinking. These four competencies indicate an emphasis on the
student experience and development within the context of higher education. The five global leadership competencies perceived to be less important were (a) business savvy, (b) resilience, (c) cross-cultural communication, (d) organizational savvy, and (e) empowering others. The participants either believed they exercised the least amount of control over the students with regards to these competencies (resilience, empowering others) or they were simply not the focus of the adult education program (business savvy, cross-cultural communication, organizational savvy).

The participants described the curricular and co-curricular practices which helped to support the development of the global leadership competencies in their classrooms and adult education programs. Practices within the classroom included embedded discussions, writing exercises, selection of readings and texts, targeted assignments, presentations, teamwork, self-directed learning, online learning, personalized projects, use of guest speakers, and innovative use of technology. The practices which emerged represent good instructional methods for the teaching of adult education graduate students, but within the context of this study, the participants described the utilization of these techniques to facilitate learning within a global context.

Practices at the co-curricular (programmatic) level included developing research agendas with a global focus, providing specific courses, attending conferences, mentoring, accepting more international students, expanding study abroad opportunities, utilizing learning communities, coordinating alumni support, offering professional development opportunities, encouraging volunteering, and encouraging awareness of what to look for at admission into the program. These findings indicate institutional ideas, which have been utilized both in the movement towards
internationalization of the adult education program, as well as basic practices for fundamental leadership development.

With regards to the similarities across all seven cases, most of psychological-based competencies associated with the first broad category, managing self, were reported to be developed at the individual level between the professor and the student. There was a general recognition of the value of these identified competencies, but much less of a focus on designing curriculum or programs around such a model. The emphasis of the second broad category, managing people and relationships, seemed to have been centered more on the building of the skills and experiences leading to completion of the program. Discussions for the competencies associated with the final category, business and organizational acumen, focused on how the adult education program prepared the students for success once they have graduated. This structure from micro- to macro-level thinking was consistent across all seven cases.

The participants focused much more on the global aspect of the competencies rather than the leadership component. Although some of the participants indicated a program-centered approach to their course of study, the many examples of student-centered learning they provided belied a rigid adherence to this mindset. Also, faculty members within the individual institutions usually did not know what the other faculty members teach within the individual courses each teaches. Additionally, there was little collaboration of thought processes regarding the themes associated with this study within the individual cases.

Among the differences noted in the findings was the fact that each institution had unique programmatic emphases (e.g., program planning, teaching practices, human
resource development, grassroots community initiatives). This was true for cases both within the United States and Western Europe. There were more differences among the Western European cases than there were between the programs located geographically in the United States and those in Western Europe.

In 2008, CPAE published *Standards for Graduate Programs in Adult Education*. However, the findings of this study indicated the *Standards* were not being universally addressed in adult education graduate programs. Many of the participants of this study were only cursorily aware of the *Standards*—or not aware of them at all, especially the participants from Western Europe—while others were extremely familiar with them and were utilizing them in departmental organizational change.

**Implications**

This section examines the implications of this study for adult education graduate programs and the field of global leadership competency development. Specifically, implications based on the findings of this study which can serve as catalysts for future practices are presented for the Commission for the Professors of Adult Education (CPAE), university administrators, adult education departmental administrators, adult education faculty, adult education doctoral students, as well as scholars in the field of global leadership. These stakeholders may consider the following suggestions.

As a result of the lack of universal awareness of the CPAE *Standards*, the Commission should revitalize their efforts to develop creative ways to market the *Standards* for adult education graduate programs within their vast network of influence and determine measures for instigating standardized approaches toward implementing
the *Standards*, not only across the United States, but throughout the broad international expanse of graduate programs which exist around the world.

Much research has been conducted regarding the internationalization of curriculum in colleges and universities in the United States and around the world. The findings from this study suggest these efforts can be promoted beyond current initiatives to facilitate global learning, especially at the graduate school level. University administrators, provosts, and deans could better emphasize the need to foster curriculum initiatives toward creating students with a stronger global mindset. The Quality Enhancement Plans (QEP) at Metropolitan Global University (MGU) and All-embracing State University (AESU) are examples of university-wide institutional support for these kinds of initiatives. These universities can serve as models for other university administrators towards fulfilling this goal.

The findings from this study indicate adult education administrators and faculty offer a variety of approaches and mindsets in regard to global leadership competencies and development. Administrators and faculty in adult education graduate programs could enhance the opportunities for their students, infusing actions which give students a broader range of experiences for leadership development, especially in a global context. Specific courses in International Adult Education and International Human Resource Development, if not already offered, could provide a path toward accomplishing this goal. Internships for the graduate students emerged as a valuable experience in consolidating many of the global leadership competencies in a complex environment. Adult education administrators and faculty could enhance these
Internship experiences by partnering with multi-national corporations and non-governmental organizations which maintain global objectives.

The programmatic practices which emerged from the findings of this study indicated supporting flexibility in admission requirements, increasing study abroad support, and accepting more of international students. As a result of these ongoing practices, professional development of the administration and faculty in terms of increasing global mindset and improving cross-cultural communications could also facilitate improvement in the development of global leadership competencies of the adult education students.

A central assumption of this study was the desire for all adult education graduate students to obtain fulfilling employment in the global workforce upon graduation. To this end, adult education graduate students could seek out opportunities in support of this goal. Adult education graduates have a broad range of backgrounds compared to many other degree offerings. They represent a unique population for global leadership competencies to manifest itself at the graduate school level. Students could establish a global research agenda during their programs, attend and present at international conferences, collaborate with international scholars on globally-focused research projects, and actively participate in discussions, assignments, and global teams to facilitate a more global perspective and learning experience during their progression through the graduate program.

Scholars in the field of global leadership have recognized the interdisciplinary aspect of the construct and could expand their scholarship into academic disciplines such as adult education, higher education, human resource
development, non-profit organizations, and grassroots community initiatives. The findings from this study indicated that many of the participants defined global in terms of the connection to local initiatives. Scholarship in social justice issues—such as gender, age, race/ethnicity, class, sexual orientation, sexual identity, and socio-economic status—all represent opportunities to view the construct of global leadership at the community level.

Research in global leadership is no longer the purview of the business community, political science, or international policy initiatives. As researchers have indicated, the competition for top leadership talent with experience in the global context will continue to increase (Gundling et al., 2011; Gupta & Van Wart, 2016; Hames, 2007; Mendenhall et al., 2013; Rosen et al., 2000). Scholars in the field of global leadership could recognize the wealth of talent emerging from graduate programs such as adult education and expand empirical research to reach this important population.

**Recommendations**

The recommendations for further research include suggestions for expansion of the population, the theoretical framework, and the research design.

The selection of cases for this study was limited to specific adult education graduate programs in the eastern part of the United States and Western Europe. There are concentrations of adult education graduate programs in other parts of the United States, as well as Canada, Australia, China, South Africa, and other parts of Africa. This study could be extended to include adult education graduate programs in other geographical regions in the United States and around the world.
Global learning initiatives are a growing part of many institutions of higher education. This study could also be conducted in any graduate program, regardless of whether or not they are associated with adult education. This study could be investigated in a single institution across multiple graduate programs. This study could also be conducted within a single area of study across a concentrated geographic area or across multiple sites around the world. Similarly, this study could be expanded to the undergraduate level.

This study concentrated on the perspectives of faculty members and administrators in adult education graduate programs. It could be expanded to include global leadership competency development from the student perspective. Another recommendation would be a study comparing the findings from both the student perspective and the faculty perspective.

The model selected for this study was Bird’s (2013) framework of nested global leadership competencies. Many other organizational frameworks exist which could have been utilized. This study could be conducted utilizing emerging global leadership competency models, as well as global leadership process models, in order to approach competency development from different perspectives.

Qualitative research is often primarily exploratory, seeking to gain a deeper understanding of the underlying reasons, opinions, and motivations for a selected population with regards to a specific phenomenon. However, this study could be enhanced by incorporating a quantitative element which would greatly expand the range of the population. Many quantitative instruments exist which could be utilized or modified to reflect an analysis of global leadership in adult education graduate
programs, or, indeed, any post-graduate program. Quantifying results across a larger population would be a helpful addition to the development of global leadership research into an expanding range of disciplines.

The interdisciplinary phenomenon of global leadership and the associated competencies lends itself to many areas of scholarship. Inquiry into the effects of globalization and leadership in a global context can be conducted in diverse fields such as psychology, geo-political science, anthropological studies, and socialization theory, among many other potential avenues for empirical research.

**Final Reflections of the Researcher**

When I began this dissertation journey, it was only by breaking the entire process down into the smallest, most manageable segments that I was able to overcome the daunting vastness and begin to discover individual successes along the way. When I read each of the 2008 CPAE *Standards* for the first time, I saw the first steps toward building a bridge which could connect the construct of global leadership with the field of adult education. The first step was to determine what question I wanted to address. I had been reading extensively in the field of global leadership, and I was familiar with the various models, which attempted to categorize the competencies associated with global leadership into organizing frameworks. I asked which of those competencies were being addressed and developed in my adult education graduate program and, by extension, other adult education graduate programs around the country and the world. From this seed of an idea, I began building my literature review and the research questions, which eventually directed this exploratory study. With constant communication between my peers, mentors, and committee members, I designed a
study which incorporated the elements of global leadership competency development, 
adult education, appreciative inquiry, and a global perspective.

After successfully defending the proposal and creating the best interview protocol 
possible, I was encouraged by the enthusiasm from the potential participants at the 
various institutions I contacted. Nearly every professor I contacted was enthusiastic 
about the desire to help me complete the study. Arrangements were made with four 
institutions in the United States and three in Western Europe. Dates and travel plans 
were solidified while the process of completing the final version of the interview protocol 
was undertaken.

Once the participants obtained the interview protocol, the first rumblings of 
skepticism began to emerge. Later, I would be told that some of the participants were 
unsure that they would be able to address the interview questions with a level of depth 
that would serve my purpose. I realized it was incumbent upon me to address these 
concerns and create probing questions which were more specific so that the 
participants felt more comfortable discussing a construct which, for many of them, they 
had never discussed before to this extent. I felt I was successful in this endeavor. By 
breaking the broad categories of the conceptual framework down into the individual 
components and asking specific questions about each competency individually, I was 
able to achieve rich, thick descriptions about the lived experiences of the faculty 
members with regard to the phenomenon of global leadership competency development 
within their adult education graduate programs.

The findings themselves were often not what I expected. With regards to the 
competencies, I was able to say that they were all addressed to some extent, because I
was able to ask about each competency during the data collection process. The addition of the ranking order question, which was a direct result of the four-phase developmental process of the creation of the interview protocol, added a depth and richness to the findings which would not have been achieved otherwise. And the multiple layers of constant comparative thematic analysis conducted to answer the third and fourth research questions provided findings that were rich and full of thought-provoking exploration. Why, for example, were the ideas of global mindset and cross-cultural communication ranked with lower importance in an exploration of global leadership competencies? Why is it seemingly such an accepted norm that the professors within a single institution communicate so little with each other about the instruction and content of their courses? Why are the foci of the adult education graduate programs so varied from each other within a single field of study? And most importantly, although the participants seemed to be very comfortable discussing the ways in which they were internationalizing or globalizing their curriculum and adult education programs, why does the discussion of leadership generate such hesitancy and uncertainty?

There was little emphasis on global leadership as a unifying construct. Although it is my opinion that the breadth of the field of adult education, which includes areas of interest such as human resource development, corporate training, non-governmental organizations, non-profit community initiatives, entrepreneurial endeavors, and social justice education, would benefit greatly from a stronger focus on leadership development initiatives, especially processes which aid in the development of these competencies within a global context. This study showed me that the seeds are in
place. The professors and students are bright, energetic, and willing to move in the direction of becoming stronger global leaders in today's workforce. There just needs to be greater focus and care in the early developmental aspects of the program in order for those seeds to turn into a strong workforce with the mindset, knowledge, skills, and attitudes to succeed in the complex and multi-faceted challenges facing our graduates today. This study has given me hope that this process is possible and underway. There are barriers, both personal and institutional, which have to be addressed. But my conclusion is that those barriers are being dismantled piece by piece by the hard work and dedication of the stakeholders who, as this study indicated, are emerging from graduate programs such as those found in adult education.
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Appendices
Commission of Professors
of Adult Education

Standards for
Graduate Programs
in Adult Education

November 2008

- American Association for Adult and Continuing Education -
## Table of Contents

**Standards for Graduate Programs in Adult Education**

1. Administration ........................................................................................................................................ 4
   1.1. Mission/Values Statement ................................................................................................................ 4
   1.2. Resources .......................................................................................................................................... 4
   1.3. Examples of Indicators ....................................................................................................................... 5
2. Organization of Graduate Study .............................................................................................................. 6
   2.1. Learning Community .......................................................................................................................... 6
   2.2. Admissions .......................................................................................................................................... 7
   2.3. Advisement ......................................................................................................................................... 7
   2.4. Thesis/Dissertation Process ............................................................................................................. 7
   2.5. Teaching Load ..................................................................................................................................... 8
3. Curriculum ............................................................................................................................................... 8
4. Faculty Members ..................................................................................................................................... 10
   4.1. Faculty Member Qualifications ......................................................................................................... 10
   4.2. Adjunct or Courtesy-Appointed Faculty Members ......................................................................... 10
Appendix A: (continued)

Standards for Graduate Programs in Adult Education
Rationale for Standards

Adult Education is a recognized field of graduate study with a distinctive body of knowledge that embraces theory, research, and practice relating to adult learners, adult educators, adult education and learning processes, programs and organizations. Graduate adult education developed as a field of study in the 1920s and 1930s and the Commission for Professors of Adult Education was established nationally in 1955. It currently meets at the annual American Association for Adult and Continuing Education (AAACE) and Adult Education Research Conference (AERC) meetings. Adult Education university-based programs are dedicated to meeting the demand for providing graduate education for those interested in understanding, fostering and articulating the ways in which adults learn and can be helped to learn in a wide range of settings. There is an historic commitment to promoting innovation in teaching-learning strategies, adoption of emerging technologies, and social change.

Graduate students in adult education are seeking academic careers or preparation for leadership and practice in a range of adult education settings. Examples include continuing education, adult learners(ing) in postsecondary environments, distance learning organizations, program development, adult basic education, cooperative extension, workplace learning, gerontology, nonprofit or community education, places of worship, as well as many other contexts. Adult education, as a field, places emphasis on developing diverse and equitable cultural and economic sustainability in schools, workplaces, and communities through the facilitation of adult learning and collaboration among participants.

This document suggests guidelines and standards for high quality planning, administration and evaluation of adult education disciplinary graduate education. They are written for use by university academic graduate programs (or specializations, departments) as a part of a voluntary internal or external program assessment process. After a systematic process of reflection and discussion, the standards have been endorsed by the national Commission for the Professors of Adult Education (CPAE).

This standards document is organized into the four distinct sections:

1. Administration
   - Mission and Values Statement
   - Resources
   - Examples of Indicators
2. Organization of Graduate Study
   - Learning Community
   - Admissions
   - Advisement
   - Thesis/Dissertation Process
   - Teaching Loads
3. Curriculum

4. Faculty Members
   - Faculty Member Qualifications
   - Adjunct or Courtesy-Appointed Faculty Members

1. Administration

1.1. Mission/Values Statement

CPAE acknowledges that Adult Education programs of study encompass a wide range of specialty areas and institutional contexts. Consequently, the CPAE standards recommend that each program creates and maintains statements that express:

The mission, purpose, and scope of the Adult Education Program and alignment with the institution’s mission.

1. The values, ethics, or principles which inform the practice and scholarship of the Adult Education Program.

2. The commitment to and understanding of diversity and inclusion.

3. A strategic plan which sets forth statements about goals for improvement, change and future directions.

These statements should be easily accessible to all constituents: faculty, staff, administrators, students, and external stakeholders, and they should be periodically reviewed and updated.

1.2. Resources

Graduate programs share a commitment to excellence and to creating a community of scholarship and practice. With this in mind, programs should be able to expect adequate resource support to accomplish these aims. While the standards cannot dictate the specific or ideal levels of resources allocated, the standards do recommend:

1. That the internal budget and support of the adult education program be in proportion to other academic units in the college relative to the level of staff and other forms of tangible resource support. Programs should also have comparable shared access to resources available at the university and college level (e.g., technology support, development/fundraising support, library collections/access, travel funds).

2. Adult education faculty and student representation and participation in college and university governance (e.g. committees, councils, decision-making bodies) should be proportional to representation of other program or department areas of comparable size in that particular university or college, and adult education program’s presence should be appropriately reflected in college or university language (mission statements, statements of purpose, web pages, etc.) and in communications to constituents.
3. The number of graduate assistantships and other forms of graduate student support should be in proportion to support given to other academic units in the college/university.

4. The adult education faculty members’ workload, evaluation and reward policies are clearly stated in terms of the balance of learning, discovery and engagement or other categories of academic responsibility that are pertinent at that particular university.

5. If program benchmarking or assessment data is required to be gathered and collected for the college or university that adequate resources (staff, software, time) are provided to adult education faculty members to support the process. This includes representative participation in relevant Commission for Professors of Adult Education meetings, projects, and committee structures and the Adult Education Research Conference and other appropriate professional organizations.

6. Due to the nature and mix of full- and part-time students, program data and definitions of categories should be clearly described and presented for enhancing external audiences’ understanding of how the presence of part-time students may alter expectations regarding processes and data concerning Adult Education programs.

Adult education programs and/or departments should voluntarily gather consistent and comparable information about their productivity and accomplishments, resources, and perceptions of the environment/climate. The information gathered may be compiled and shared for internal growth and development as well as external university and external constituent purposes.

### 1.3. Examples of Indicators

Examples of indicators of a high quality graduate program are as follows:

- Publications in refereed journals and other academic publications (books, reports) by faculty members, students, and graduates
- Additional alternative forms of scholarship (e.g., white papers, public policy documents, evaluation project reports) by faculty, students, and graduates
- Contributions by faculty, students, and graduates to conferences at all levels (local, regional, national, international)
- Exchanges with colleagues at other universities and programs, both formal and informal (faculty and students)
- Other forms of alternative educational experience (e.g., exchange, internship, service learning, research team experience)
- Service to the field and profession by faculty, students, and graduates (e.g., serving on CPAE, AAACE, or AERC leadership positions, or other appropriate professional associations)
- Appropriate professional placement and performance by graduates
- Visible and equitable participation in the surrounding college and university environments
Appendix A: (continued)

- Visible commitment to principles of integrity and equity in the educational process
- Shared perceptions of an educational environment that is collegial, collaborative and innovative

2. Organization of Graduate Study

A graduate program in adult education may be located in a variety of colleges (e.g. education, agriculture, human development) or form part of a multi- or interdisciplinary unit. The strength of a high quality graduate program lies in the caliber of its faculty, its students, and its graduates. Programs should be organized to maximize and support their contributions to theory, research, and practice in the field. While programs will need to organize their efforts in relation to their institutional context, the following general criteria apply:

2.1. Learning Community

As a field, adult education scholars and practitioners are committed to high quality and innovative instructional philosophies and practices with the understanding that adult education graduate students come from a range of professional and academic preparation backgrounds. There is a shared commitment that this diversity of backgrounds serves as an asset or strength in fostering a community of learning.

Other suggested ways to enhance the instructional process and learning community include:

- A commitment to providing adult education faculty members with opportunities for both formal and informal professional development experiences related to their teaching
- A commitment to providing adult education faculty members with appropriate levels of support and professional development regarding the integration and use of technology or other innovative practices in instruction
- A process for systematic review of courses, programs and procedures related to the formal curriculum and informal practices that support graduate teaching and learning
- A process for systematic feedback from current and former students, and other stakeholders regarding the quality of graduate programs (e.g., relevance of courses, appropriate pace and time to completion of studies, alumni accomplishments)
- An identifiable and equitable resource or process for resolving faculty and/or student issues, questions, or potential grievances
- The presence of informal learning opportunities for faculty and students such as colloquia, study circles, research, mentorship, service learning opportunities, and other special learning events
- Formal and informal contacts with faculties from other disciplines, in the interest of developing fruitful relationships that benefit adult education faculty, students, and alumni
Appendix A: (continued)

- The presence of visible reward structures (local, regional, national, international) for innovative and high quality graduate teaching, advisement, and research

2.2. Admissions

In universities where the admissions decisions are made at the program level, the standards recommend that:

- The student admissions committee includes at least one full-time or part-time member with a doctorate in adult education
- Criteria for admission should be discussed and understood by all admissions committee members within appropriate legal and institutional compliance, and if permitted, be clearly stated and available to prospective applicants
- Information (if any) on graduate assistantships should be available to all prospective applicants
- Information (if any) on the suitability and processes in place to support part-time graduate study should be available to all prospective applicants

2.3. Advisement

The load for advisement depends on certain variables (e.g., number of thesis students and number of non-thesis students and number of doctoral advisees). For advisement, a distinction is made between full and part-time students. For faculty loads in advising, the following are suggested as guidelines for high-quality programs, allowing for adjustments made to account for the proportion of masters and doctoral level students:

- A student handbook should be available to both faculty and students to serve as a written guide about the course and graduate school process requirements; exceptions to suggested process should be documented accordingly
- For students at the coursework stage of advisement, an active student/faculty ratio of no more than 25 to 1
- For students writing a capstone, thesis or major dissertation, a combined active student/faculty ratio of no more than 15 to 1

2.4. Thesis/Dissertation Process

- The program committee is to be chaired by an adult education faculty member or a related discipline faculty member subject to approval of the adult education unit. Whether the student chooses a thesis or non-thesis option, the chair and student select advisors or committee members who will best support student’s desired competency and specialty areas
- The program committee for doctoral students is to be chaired by an adult education faculty member or a related discipline faculty member subject to approval of the adult education unit. The chair and student select committee members who will best support a student’s desired competency, specialty, and methodological areas
2.5. Teaching Load

The teaching load of a full-time faculty member varies according to many factors, such as onsite or hybrid/distance course delivery assignments, number and level (master’s and doctoral) of student advisees, status of advisees (coursework, thesis/dissertation research) and funded research commitments/buyouts. These are based upon teaching loads over time (norms) rather than idiosyncratic semester-by-semester fluctuations in workload. The number of student advisees that exceeds the recommend guidelines will ideally result in course load reassignment. For faculty loads in teaching, the following are suggested general guides:

- Faculty members with fewer than 3 master’s thesis or capstone students or fewer than 2 doctoral dissertation students should not teach more than 5-6 courses (3 credits each) during the academic year. Programs on the quarter system may have a higher number of hours.
- Faculty members with 3 to 6 master’s thesis students, 4-5 courses per academic year; for those having 7-10 master’s thesis students, 4 courses.
- Faculty members with 2-4 students at dissertation stage should not exceed 4-5 courses per year and for those having 5 to 7 students at the dissertation stage, 4 courses per year.

3. Curriculum

Adult education coursework should clearly distinguish between masters and doctoral levels in terms of defining outcomes relevant to beginning and advanced graduate study. For both levels, adult education places a value on the concept of praxis, of integrating theory and practice in such a way that good practice informs and enhances development and use of theory; and, in the reverse, that good theory informs and enhances the development and application of practice. Further, adult education places a high value on innovation and acknowledges the influence of technology both in terms of content and delivery of curriculum. The Commission recommends consulting best practices for distance delivery developed by relevant professional associations.

For some programs, masters and doctoral students will have some overlap in core coursework. When they are taught separately, the following core topical areas, taught from diverse and critical perspectives, are suggested at the master’s level. These suggestions are for topical areas, and are not necessarily equivalent to separate courses:

- Introduction to the nature, function and scope of adult education
- Adult learning and development
- Adult education program processes, including planning, delivery, and assessment/evaluation
- Introductory study of how technology influences adult education
Appendix A: (continued)

- Historical, philosophical and sociological foundations of adult education
- Overview of educational research

These core areas are supplemented by additional study appropriate to student needs and goals, which may emphasize a range of leadership roles (e.g. administrator, teacher, counselor). A student’s area of specialty may relate to study within the range of specialty areas reflected in the adult education faculty or may extend to study with other faculties. In general, it is unlikely that any adult education graduate program will contain all the supporting courses that students require (e.g., business, community development, philosophy, political science, sociology, psychology, etc.), and students should be encouraged to seek out and supplement program instruction through selected coursework and learning experiences with other appropriate faculties or program areas.

At the doctoral level, these suggestions are for topical areas, and are not necessarily equivalent to separate courses. The suggested core topical areas include:

- Advanced study of adult learning (theory and research)
- Historical, philosophical foundations of adult education
- Study of leadership, including theories or organizational leadership, administration and change
- Analysis/study of the changing role of technology in adult education
- Study of issues of policy in relation to adult education
- Analysis of globalization and international issues or perspectives in adult education
- In-depth analysis of social, political and economic forces that have shaped the foundations and discourse within adult education
- Advanced specialty courses relevant to unique program and faculty strengths (e.g., continuing professional education, workplace learning, social movement learning)
- Appropriate depth of qualitative or quantitative research methodology coursework to support dissertation research and ability to utilize existing literature

Students entering doctoral study with a master’s degree in another field may be asked to take prerequisites from the adult education master’s level courses. At the master’s level, select doctoral courses may be used as a supplement to additional study congruent with students’ needs and goals.

Adult education doctoral study can be a Ph.D., an Ed. D., or both options may be available at some institutions. Institutions offering both options should provide clear information on the distinctions between the two degrees. Generally, the Ed. D. focuses on translating theory and research into practice, and has the larger goal of preparing practitioners or scholar-practitioners who will be well-informed, credible leaders in the field of adult education. The Ph. D. emphasizes the study and synthesis of theory and research, and can produce dedicated scholar-researchers committed to the advancement of knowledge and scholarship in the field and may also produce scholar-practitioners who wish a strong depth in research preparation for practice.
Appendix A: (continued)

4. Faculty Members

4.1. Faculty Member Qualifications

Institutions offering a graduate degree, major, certificate or specialization in adult education appear in a variety of organizational forms and with differing language. For example, some programs are independent departments while others are combined with other program areas into departments with interdisciplinary degrees with specializations in adult education. Full-time members of the adult education faculty should have an earned doctorate in adult education or a related designation. Other designations or language may include, though are not limited to: lifelong education, community education, cooperative extension, and continuing education. Additional part-time, adjunct or courtesy-appointed faculty should have earned doctorates in adult education or relevant related fields with knowledge of and, preferably, experience in adult education. Other criteria for consideration are as follows:

- Academic rank necessary for graduate status in a tenure eligible position
- A record of leadership, as evidenced by significant positions in the adult education field, profession and university
- A record of contributions to adult education scholarship
- A continuing commitment to adult education theory, research and knowledge of current best practices

Selection or hiring of faculty should be on the basis of their particular expertise and contributions, and the following general criteria:

- An earned doctorate or specialization in the adult education area of their competency or a closely related discipline approved at the discretion of the adult education faculty
- Evidence of interest and commitment to the field of adult education
- A record of contributions to scholarship relating to courses to be taught or areas of advisement (e.g., adult basic education, community development, continuing professional education, human resource development)

Resources available to adult education faculty members should be on par with resources made available within the surrounding college and university contexts in terms of salary, office support, travel support, graduate student assistantship, or other forms of research support.

4.2. Adjunct or Courtesy-Appointed Faculty Members

Adult education programs should develop and document an explicit rationale for the participation of full-time, part-time, and adjunct/associate faculty with understandings about what roles, responsibilities, contributions, and privileges faculty members should expect to have based upon their full-time, part-time, adjunct/associate and tenure eligible/non tenure eligible position. In exceptional cases, suitable experience may be substituted for the doctorate when appointing part-time or adjunct/associate faculty members. Part-time or adjunct/associate faculty members are individuals whose assignments to the adult education area are limited due to:
Appendix A: (continued)

- A full-time administrative role at the university
- A major commitment as a faculty member in another program or university
- A formal joint appointment between adult education and another recognized unit in the university
- A research appointment related to grants or contract funded work
- An assignment outside of the university (business, government, voluntary agency, consultant)
- A retired or emeritus adult education faculty member

Approved November 13, 2008, CPAE Business Meeting during AAACE Annual Conference, Denver CO.
Appendix A: (continued)

Standards for Graduate Programs in Adult Education Project

The project to further develop the original Standards for Graduate Programs in Adult Education began at the CPAE meeting in November, 2005 in Pittsburgh. A panel consisting of Dr. Fred Schied, Dr. W. Lee Pierce, and Dr. Carol Kasworm discussed their views on maintaining standards for graduate programs in adult education and suggestions for modifying those standards. Dr. Susan Bracken agreed to serve as Project Chair to revise the Graduate Program Standards. Several drafts of the Standards were discussed at open forums at the CPAE Conferences and at CPAE Mid-year Meetings held at the Adult Education Research Conference (AERC) during 2006 - 2008. Drafts were also circulated several times via the CPAE Listserv and revisions to the standards were made based upon comments and suggestions from CPAE colleagues.

CPAE colleagues who contributed to this project include:

Chair, Dr. Susan Bracken (North Carolina State University)
and, in alphabetical order:

Dr. Patricia Brewer (Union Institute and University)
Dr. Catherine A. Hansman, Chair and AAACE Commissioner 2005-2006 (Cleveland State University)
Dr. Carol Kasworm (North Carolina State University)
Dr. Henry S. Merrill (Indiana University)
Dr. W. Lee Pierce (University of Southern Mississippi)
Dr. Fred Schied (Penn State University)

CPAE Executive Committee:

Chair and AAACE Commissioner: Dr. Henry Merrill (Term 2007-2008)
Chair Elect: Dr. Mary V. Allred (Term 2008)
Secretary-Treasurer: Dr. Howard Walters (Term 2008-2009)
Membership Committee Chair: Dr. W. Lee Pierce

At-large Members:
Dr. Jim Berger (Term 2007-2008)
Dr. Rosemary Closson (Term 2007-2008)
Dr. Lisa Baumgartner (Term 2008-2009)
Dr. Lilian Hill (Term 2008-2009)

Contact information for AAACE/CPAE
American Association for Adult and Continuing Education
10111 Martin Luther King, Jr. Highway
Suite 200C
Bowie, MD 20720
URL: http://www.aaace.org
Appendix B: Representative Definitions of Global Leadership Found in the Literature

Table B1

**Representative Definitions of Global Leadership Found in the Literature**

<table>
<thead>
<tr>
<th>Author</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Adler (1997)</td>
<td>“Global leadership involves the ability to inspire and influence the thinking, attitudes, and behavior of people from around the world . . . [it] can be described as a process by which members of the world community are empowered to work together synergistically toward a common vision and common goals resulting in an improvement in the quality of life on and for the planet” (p. 174).</td>
</tr>
<tr>
<td>Brake (1997)</td>
<td>“Global leaders—at whatever level or location—(a) will embrace the challenges of global competition, (b) generate personal and organizational energies to confront those challenges, and (c) transform the organizational energy into world-class performance” (p. 38).</td>
</tr>
<tr>
<td>Spreitzer, McCall, and Mahoney (1997)</td>
<td>“An executive who is in a job with some international scope, whether in an expatriate assignment or in a job dealing with international issues more generally” (p. 7).</td>
</tr>
<tr>
<td>Gregersen, Morrison, and Black (1998)</td>
<td>“Leaders who can guide organizations than span diverse countries, cultures, and customers” (p. 30).</td>
</tr>
<tr>
<td>McCall and Hollenbeck (2002)</td>
<td>“Simply put, global executives are those who do global work. With so many kinds of global work, again depending on the mix of business and cultural crossings involved, there is clearly no one type of global executive. Executives are more or less global depending upon the roles they play, their responsibilities, what they must get done, and the extent to which they cross borders” (p. 35).</td>
</tr>
<tr>
<td>Osland and Bird (2006)</td>
<td>“Global leadership is the process of influencing the thinking, attitudes, and behaviors of a global community to work together synergistically toward a common vision and common goal” (p. 139).</td>
</tr>
</tbody>
</table>
### Appendix B: (continued)

Table B1: (continued)

<table>
<thead>
<tr>
<th>Author</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Caligiuri (2006)</td>
<td>“Global leaders, defined as executives who are in jobs with some international scope, must effectively manage through the complex, changing, and often ambiguous global environment” (p. 129).</td>
</tr>
<tr>
<td>Beechler and Javidan (2007)</td>
<td>“Global leadership is the process of influencing individuals, groups, and organizations (inside and outside the boundaries of the global organization) representing diverse cultural/political/institutional systems to contribute towards the achievement of the global organization’s goals” (p. 140).</td>
</tr>
<tr>
<td>Caligiuri and Tarique (2009)</td>
<td>“Global leaders [are] high level professionals such as executives, vice presidents, directors, and managers who are in jobs with some global leadership activities such as global integration responsibilities. Global leaders play an important role in developing and sustaining a competitive advantage” (p. 336).</td>
</tr>
<tr>
<td>Mendenhall et al. (2013)</td>
<td>“Global leaders are individuals who effect significant positive change in organizations by building communities through the development of trust and the arrangement of organizational structures and processes in a context involving multiple cross-boundary stakeholders, multiple sources of external cross-boundary authority, and multiple cultures under conditions of temporal, geographical, and cultural complexity” (p. 20).</td>
</tr>
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</table>

*Note: Adapted from Reiche and Mendenhall (2013).*
Appendix C: Sample Email Invitation to Participate/Interview in the Study

March 28, 2015

Dear __________________,

My name is Arthur (Ray) McCrory. I am a doctoral candidate in Adult Education at the University of South Florida. I am contacting you to request your help with my dissertation. I am conducting a study entitled *Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe*.

The purpose of the study is to examine which global leadership competencies are addressed and developed in Adult Education graduate programs. I will be happy to explain in further detail exactly how global leadership competencies are defined in my study. I am using Bird’s (2013) Framework of Nested Global Leadership Competencies (see attachment) as the conceptual framework.

For my study, I am looking to interview 2 professors from your institution, so any help you may provide with encouraging a second professor to participate would be greatly appreciated. The full study will consist of 12 interviews (3 programs in the US, and 3 in Western Europe; 2 interviews per Adult Education graduate program).

Your position as a professor at an Adult Education graduate program department would provide valuable insights for the study. Results from the study will hope to encourage further research on global leadership development issues and Adult Education graduate development and practices.

The interview will take approximately 60-90 minutes to complete. You will be provided the interview protocol in advance for review and preparation. If possible, I would travel to you; if that is not possible, we could conduct the interview via Skype at your most convenient time. I am hoping to conduct all of my interviews in the months of April or May 2015. The interviews will be digitally recorded and transcribed, with your permission. To maintain anonymity, your comments will not be identified by name, only an assigned pseudonym.

If you agree to participate, I would need a letter of support as soon as possible for the USF Institutional Review Board approval for research. I can provide the wording and structure of this letter for your convenience. I would send it to you as soon as I receive your agreement to this email.

If you are interested in participating, please contact me at [email protected] or by phone [insert number].

As you know, the completion of a Ph.D. dissertation is an amazingly detailed and personal journey. I sincerely hope for your consideration of my request. I look forward to hearing from you.

Sincerely,

Arthur Ray McCrory
Ph.D. Candidate / Adult Education
Adjunct Instructor / Leadership Studies
Graduate Assistant / Office of Undergraduate Studies
University of South Florida
Appendix D: Sample Letter of Support to Participate in Study

March 31, 2015

Dear Arthur Ray McCrory,

I understand that you are seeking the support of the Adult Education Program for your proposed research project for your dissertation with University of South Florida (USF) College of Education. You are asking for access to two (2) faculty members for a 60-90 minute interview each on the subject of global leadership competency development in the Adult Education department. Additionally, you are requesting copies of syllabi samples for selected courses as supporting documentation for your research project.

We will be pleased to provide you the assistance requested and fully support the involvement of our office in this project. We look forward to working with you.

Sincerely,

[Redacted]

Professor and Program Coordinator, Adult Education
Appendix E: List of Validation Panel Participants

Table E1

<table>
<thead>
<tr>
<th>Name</th>
<th>Current Position</th>
<th>Gender</th>
<th>Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Christy Rhodes</td>
<td>Assistant Professor</td>
<td>Female</td>
<td>Adult Education</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Geographical Representative from Southeast United States</td>
</tr>
<tr>
<td>Dr. Richard Krueger,</td>
<td>Professor, University of Minnesota</td>
<td>Male</td>
<td>Qualitative Research</td>
</tr>
<tr>
<td>Dr. Mitch Ashley</td>
<td>Professor of Psychology,</td>
<td>Male</td>
<td>Qualitative Research</td>
</tr>
<tr>
<td></td>
<td>Rutgers University</td>
<td></td>
<td>Geographical Representative from East Coast of United States</td>
</tr>
<tr>
<td>Tonya Scotece</td>
<td>Doctoral Candidate</td>
<td>Female</td>
<td>Adult Education</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Language Representative from Italy</td>
</tr>
<tr>
<td>David Maddox</td>
<td>CEO, Delta English</td>
<td>Male</td>
<td>Global Leadership</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Geographical Representative from Ireland</td>
</tr>
<tr>
<td>Dr. Prof. Stefanie Graff</td>
<td>Director, School of Business</td>
<td>Female</td>
<td>Global Studies</td>
</tr>
<tr>
<td></td>
<td>Administration, University of Leipzig</td>
<td></td>
<td>Geographical Representative from Germany</td>
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</table>
Appendix F: Correspondence and Instructions for Interview Protocol Validation Panel

Interview Protocol Validation Panel Invitation Letter

Study: Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe.
RE: IRB PRO00021577

Dear (Validation Panel Participant),

Your expertise is vital to the success of research being conducted at the University of South Florida. In this early phase of the research, a panel of experts will assist in the creation of an instrument (an interview protocol), which will be used with faculty and administration of selected adult education graduate programs in the United States and Western Europe.

If you choose to participate, your role as a validation panel participant would be to assess the appropriateness and accuracy of the questions on the interview protocol for their intended purposes.

If you have any questions about this research, please feel free to contact the researcher at the address or phone number below.

Sincerely,

Arthur Ray McCrory, MS
Doctoral Candidate
[Contact Information]
Appendix F (Continued)

Interview Protocol Validation Panel Letter of Explanation

Study: A Multiple Case Examination of Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe.
RE: IRB PRO00021577

Dear (Validation Panel Participant),

Thank you for agreeing to be a part of research being conducted at the University of South Florida. In this early phase of the research, a panel of experts will assist in the creation of an instrument (an interview protocol), which will be used with faculty of selected adult education graduate programs in the United States and Western Europe.

In your role as a validation panel participant, you are being asked to assess the appropriateness and accuracy of the questions and sub-questions for their intended purposes; as well as provide feedback on the comprehension, wording, and appropriateness of the questions for the geographic regions selected for the study.

Attached to this correspondence you will find an explanation of Bird's (2013) framework of nested global leadership competencies, which guides the content domain of the key questions on the interview protocol. With a basic understanding of this concept, please review the 7 questions (and sub-questions) using the following Qualtrics link. With this link, you can provide online any comments, questions, or feedback you may have for each question based on your area of expertise and your initial impression of the instrument. I will receive a notification when you have finished the review. It is expected that the process should take from 10-20 minutes.

If you have any questions about this research, please feel free to contact the researcher at the address or phone number below.

Sincerely,

Arthur Ray McCrory, MS
Doctoral Candidate
[Contact Information]
### Appendix G: List of Verification Panel Participants

#### Table G1

*List of Verification Panel Participants*

<table>
<thead>
<tr>
<th>Name</th>
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<th>Gender</th>
<th>Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Melanie Wicinski</td>
<td>Assistant Director, Institutional Effectiveness and Assessment</td>
<td>Female</td>
<td>Adult Education, Global Leadership, Geographical Representative from Southeast United States</td>
</tr>
<tr>
<td>Jack Garrett</td>
<td>Urban Anthropologist, Pinellas County Homeless Leadership Board</td>
<td>Male</td>
<td>Leadership Development, Geographical Representative from Southeast United States</td>
</tr>
<tr>
<td>Melinda Caltibiano,</td>
<td>Director, Red Cross Society, New York Office</td>
<td>Female</td>
<td>Global Leadership, Geographical Representative from East Coast of United States</td>
</tr>
<tr>
<td>Mario Giampaolo</td>
<td>Doctoral Candidate, University of Padua, Italy</td>
<td>Male</td>
<td>Adult Education, Language Representative from Italy</td>
</tr>
<tr>
<td>Kevin Bourgeois,</td>
<td>Business Owner</td>
<td>Male</td>
<td>Geographical Representative from Ireland</td>
</tr>
<tr>
<td>Victor von Schweinitz</td>
<td>Sales Executive, LATAM Airlines Group, Bern, Switzerland</td>
<td>Male</td>
<td>Global Leadership, Geographical Representative from Germany</td>
</tr>
</tbody>
</table>
Appendix H: Correspondence and Instructions for Interview Protocol Verification Panel

Interview Protocol Verification Panel Invitation Letter

Study: Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe.
RE: IRB Pro00021577

Dear (Verification Panel Participant),

Your expertise is vital to the success of research being conducted at the University of South Florida. In this early phase of the research, a panel of experts will assist in the creation of an instrument (an interview protocol), which will be used with faculty and administration of selected adult education graduate programs in the United States and Western Europe.

If you choose to participate, your role as a verification panel participant would be to review, concur, or refute the suitability, clarity, relevance, and completeness of the seven interview questions and sub-questions.

If you have any questions about this research, please feel free to contact the researcher at the address or phone number below.

Sincerely,

Arthur Ray McCrory, MS
Doctoral Candidate
[Contact Information]
Appendix H (Continued)

Interview Protocol Verification Panel Letter of Explanation

Study: A Multiple Case Examination of Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe.

RE: IRB Pro00021577

Dear (Verification Panel Participant),

Thank you for agreeing to be a part of research being conducted at the University of South Florida. In this early phase of the research, a panel of experts will assist in the creation of an instrument (an interview protocol), which will be used with faculty of selected adult education graduate programs in the United States and Western Europe.

In your role as a verification panel participant, you are being asked to assess the appropriateness and accuracy of the questions and sub-questions for their intended purposes; as well as provide feedback on the comprehension, wording, and appropriateness of the questions for the geographic regions selected for the study.

Attached to this correspondence you will find an explanation of Bird’s (2013) framework of nested global leadership competencies, which guides the content domain of the key questions on the interview protocol. With a basic understanding of this concept, please review the 7 questions (and sub-questions) using the following Qualtrics link. With this link, you can provide online any comments, questions, or feedback you may have for each question based on your area of expertise and your initial impression of the instrument. I will receive a notification when you have finished the review. It is expected that the process should take from 10-20 minutes.

If you have any questions about this research, please feel free to contact the researcher at the address or phone number below.

Sincerely,

Arthur Ray McCrory, MS
Doctoral Candidate
[Contact Information]
Appendix I: Review of Verification Panel 5-Level Likert Scale Results for Interview Protocol Questions

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Question 1 is clearly articulated.</th>
<th>Question 1 is relevant to the study.</th>
<th>Question 1 is appropriate for the study.</th>
<th>Question 1 is complete and comprehensive in the context of the study.</th>
</tr>
</thead>
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<tr>
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<td>4</td>
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<tr>
<td>Max Value</td>
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<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Mean</td>
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<td>4.90</td>
<td>4.90</td>
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<tr>
<td>Variance</td>
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</tr>
<tr>
<td>Standard Deviation</td>
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<td>0.48</td>
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<td>Total Responses</td>
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<td>10</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

4. Please provide any additional comments in the space below.

**Text Response**

In relation to global competence or just in general?
I wouldn’t write question but statement or item
Is this asking about one of the best experiences in a teaching capacity, learning from other faculty, both? Does it matter?
It may be better to ask for the best experience instead of one of the best experiences.
No comment
"Best" may have many different meanings (most rewarding, most enjoyable, most interesting) - you may wish to clarify what you are getting at.
no comment

<table>
<thead>
<tr>
<th>Statistic</th>
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<tbody>
<tr>
<td>Total Responses</td>
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</table>

**Question 1 Probes:** Describe a positive experience while working in your current position. Describe an experience while working in your current position when you felt like everything was going really well. What do you value most
Appendix H: (Continued)

<table>
<thead>
<tr>
<th>#</th>
<th>Completely disagree</th>
<th>Somewhat disagree</th>
<th>Neutral</th>
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<table>
<thead>
<tr>
<th>Statistic</th>
<th>The probes for Question 1 are clearly articulated</th>
<th>The probes for Question 1 are relevant to the study</th>
<th>The probes for Question 1 are appropriate for the study</th>
<th>The probes for Question 1 are complete and comprehensive in the context of the study</th>
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<td>4</td>
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<td>Max Value</td>
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<td>Mean</td>
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Please provide any additional comments in the space below.

<table>
<thead>
<tr>
<th>Text Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>The probes made it clear that this was an opening question designed to make the interviewee comfortable.</td>
</tr>
<tr>
<td>no comment</td>
</tr>
<tr>
<td>Same as above. I believe that they are well thought out questions; however, sub questions 1, 2, and 4 will most likely be an expansion on the answer to question 1.</td>
</tr>
<tr>
<td>No comment</td>
</tr>
<tr>
<td>A little more clarity regarding the positive experience...positive experience regarding what?...really well regarding what. I think some parameters are needed. I like the last two probes</td>
</tr>
<tr>
<td>No comment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Responses</td>
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</tr>
</tbody>
</table>
Appendix J: Interview Protocol

Interview Protocol Form

IRB Title: A Multiple-Case Examination of Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe.

IRB#: Pro00021577

Date:
Time:
Location:
Interviewer: Arthur Ray McCrory
Interviewee:

Introductory Protocol

Good morning (afternoon). My name is Ray McCrory. Thank you for participating in this research study. Before we get started, I’d like to review a few important items with you.

As discussed previously, to facilitate note-taking I would like to audio record our conversation today. Only researchers on the project will be privy to the audio recordings, which will eventually be destroyed after they are transcribed. In addition, please sign this form devised to meet the Internal Review Board human subject requirements for my university. Essentially, this document states that your participation is voluntary and you may stop at any time if you feel uncomfortable, and it highlights the primary goals of the study.

I have planned this interview to last no longer than one and a half hour. During this time, there are ten questions that I would like to cover. If time begins to run short, it may be necessary to move forward and complete the line of questioning. Do you have any questions? Shall we begin?

Introduction – Press record on the digital recorder.

Good morning (afternoon). My name is Arthur Ray McCrory. Thank you for agreeing to participate in this research project. You have been identified as a faculty member within the Adult Education department who has information to share about the topic of my research. This research project, as a whole, focuses on an examination of global leadership competency development in selected adult education graduate programs in the United States and in Western Europe, with particular interest in your perceptions regarding which competencies are addressed and in what ways they are developed within your department. This study does not aim to evaluate your techniques or experiences. Rather, I am trying to learn more about the specific phenomenon of global leadership competencies within Adult Education graduate programs, and hopefully, to learn about some faculty best practices that help develop these competencies. If we need to stop for any reason along the way, just let me know and we can pause the recording. I realize that some of these questions may be difficult to answer. I will do my best to provide probing questions or to re-word the question as necessary for you. Do you have any questions before we begin?
Appendix J: (Continued)

First, I’d like to ask you a few **Demographic Questions**.

At which institution did you receive your doctorate?

What is your current position at this institution?

How long have you worked in this position at this institution?

What were your other positions (if any) at other institutions?

What is your native language?

What other languages do you speak?

Thank you. My first question is about the **positive** experiences you’ve had in the field of Adult Education.

**Opening Questions:**

1. **In your current position as a faculty member in Adult Education, would you please describe one of the **best** experiences you have had?**

   **Probes:** This could be an experience with your students or your fellow colleagues. . .
   Or perhaps it was outside your department but within the field of Adult Education.
   Describe an experience when you felt like everything was going really well in your role as a faculty member, or when you received the greatest job satisfaction.
   What do you **value** most about your current position at your institution?

2. **Describe a recent experience in your career in Adult Education that made you feel enthusiastic or excited about the **future** for the field of Adult Education.**

   **Probes:** What direction do you see for the field of Adult Education?
   What actions would you like to see taken for the future of the field of Adult Education?
Appendix J: (Continued)

Transition Questions:

3. In 2008, the Commission of Professors of Adult Education published the Standards for Graduate Programs in Adult Education. For the purposes of this study, they specifically included the following 2 standards:
   (a) The study of leadership, including theories or organizational leadership, administration, and change; and
   (b) An analysis of globalization and international issues or perspectives in adult education?
   Are you familiar with these Standards and this publication?

   Probes: If yes, to what extent has the Adult Education department at your institution moved towards meeting the Standards?
   If no, I’m happy to provide you with a copy for future reference. They provide a roadmap for this study and the connection between Adult Education and Global Leadership.

4. Please describe an experience you have had in the field of Adult Education in a global or international setting?

   Probes: How did those global or international experiences influence or affect your role in your current position?

5. What does the term global leadership mean to you?

   Probes: What are words, images, ideas, or examples that come to mind when you think of the term global leadership?
   In what other ways can you describe this term?
Appendix J: (Continued)

Key Questions:

6. Looking at the diagram of Bird’s (2013) Framework of Nested Global Leadership Competencies, please rank order (from 1 to 5) the competencies under the category Managing Self with regards to the extent in which they are addressed and developed in your Adult Education department.

Please provide some examples of how the competencies are addressed and developed in the curriculum (inside the classroom) for your Adult Education department? Specific examples could include classroom exercises or assignments, learning outcomes, etc.

Please provide some examples of how the competencies are addressed and developed in the co-curricular (outside the classroom) elements of your department? Specific examples could include study abroad, participation in campus organizations, attendance at conferences, etc.

Probes: Inquisitiveness. Includes encouragement to experience new opportunities, new ideas, new responsibilities, etc.

Global Mindset. Includes merging of new perspectives, attitudes, and knowledge learned or experienced within a global context, application of learning in an international, multi-cultural setting, etc.

Flexibility. Includes ways in which students address situations that fall outside the expected norms, ability to adapt behavior to fit the demands of any given situation, etc.

Character. Includes issues such as ethics, integrity, clarity of personal values, accountability, or personal responsibility, etc.

Resilience. Includes ways in which student are encouraged to maintain their optimism, reduce their stress, increase their self-confidence, maintain a healthy lifestyle, support a work-life balance, etc.
Appendix J: (Continued)

7. Looking at the diagram of Bird’s (2013) Framework of Nested Global Leadership Competencies, please rank order (from 1 to 5) the competencies under the category Managing People and Relationships with regards to the extent in which they are addressed and developed in your Adult Education department.

Please provide some examples of how the competencies are addressed and developed in the curriculum (inside the classroom) for your Adult Education department? Specific examples could include classroom exercises or assignments, learning outcomes, etc.

Please provide some examples of how the competencies are addressed and developed in the co-curricular (outside the classroom) elements of your department? Specific examples could include study abroad, participation in campus organizations, attendance at conferences, etc.

Probes: Valuing people. Includes respect for others and the differences between peoples, forming trusting relationships, etc.

Cross-cultural communication. Includes cultural awareness—both your own culture as well as the culture of others; specific skills such as foreign language skills, negotiating across cultures, or communication skills, etc.

Interpersonal skills. Includes emotional intelligence, self-awareness, sensitivity, or engagement with others. Also includes listening skills or relationship building exercises, etc.

Teaming skills. Includes opportunities to work in multicultural or global teams, etc.

Empowering others. Includes opportunities to empower others, or to increase self-efficacy of their colleagues. Also includes coaching or professional (or personal) development, etc.
8. Looking at the diagram of Bird’s (2013) Framework of Nested Global Leadership at the
diagram of Bird’s (2013) Framework of Nested Global Leadership Competencies, please
rank order (from 1 to 5) the competencies under the category Business and
Organizational Acumen with regards to the extent in which they are addressed and
developed in your Adult Education department.

Please provide some examples of how the competencies are addressed and developed in
the curriculum (inside the classroom) for your Adult Education department? Specific
eamples could include classroom exercises or assignments, learning outcomes, etc.

Please provide some examples of how the competencies are addressed and developed in
the co-curricular (outside the classroom) elements of your department? Specific
eamples could include study abroad, participation in campus organizations, attendance
at conferences, etc.

Probes:  Vision and strategic thinking. Includes examples of a complex exercise or
situation that requires big-picture strategic thinking and planning. Also includes
the development of a global vision for any given project or learning outcome.
Examples include long-term strategic plans for the students themselves or for a
project.

Leading change. Includes final projects or outcomes that reflect growth and
change within the student’s learning experiences. How are these changes assessed? How can faculty describe the changes that occur on a personal or
professional level within the students’ work and experiences?

Business savvy. How would you define business savvy in the context of Adult
Education? Includes specific learning about what knowledge, skills, or behaviors
are needed to enter the global workforce. Also includes preparation of students
with the technically-oriented knowledge and creativity required in the business or
entrepreneurial setting?

Organizational savvy. Includes ways of learning the hierarchical, symbolic, or
political organizational barriers to a career in the global workforce, specifically in
the field of adult education. Also includes learning to navigate these
organizational barriers.

Managing communities. Includes ways in which students interact with networks
of other students, communities, organizations, departments, or global
relationships. Also includes ways to improve their ability to cross the cultural
boundaries between these communities?
Appendix J: (Continued)

9. In terms of the Adult Education graduate study at your institution, and the future success of your students after graduation, which of these competencies do you perceive to be the most important? Why?

   Do you think that any of the competencies are not relevant for the Adult Education graduate program? Why not?

   Are there any competencies missing from this list that you believe should be included?

Probes: It is possible that not all of these 15 competencies have the same level of importance to you.

   Which ones do you perceive to be the most important within the context of your institution and program? Why?

   Which ones are not relevant? Why not?

Ending Question

10. With respect to your understanding of global leadership, describe what your Adult Education department would look like at its absolute best. If you had all the resources you felt you needed, all the funding, all the personnel, and the best students . . . describe this vision to me.

    Probes: How would you and your colleagues in the Adult Education department interact on a daily basis?

    What is the one major missing piece between that vision and where your department is now?

Conclusion

Are there any other comments you would like to add before we finish?

That concludes this interview. Again, thank you for agreeing to participate in this research project. Your expertise and experience are greatly appreciated. I want to assure you once again of the confidentiality of your responses. With your agreement, I will send you an email in a couple of days so that you can provide any further information that may come to you after the conclusion of this interview. Also, as soon as the interview transcript is completed, I will send you an email so that you can review all of your responses for clarity and final comment. Thank you again for your support.
Appendix K: An Overview of Which Research Questions are Addressed by Which Interview Questions

Table K1

An Overview of Which Research Questions are Addressed by Which Interview Questions

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Interview Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>RQ1: Which global leadership competencies are addressed in the selected adult education graduate programs in the United States and Western Europe?</td>
<td>IQs 6-8. Looking at the diagram of Bird’s (2013) Framework of Nested Global Leadership Competencies, which of the competencies under the category “Managing Self”, “Managing People and Relationships, and “Business and Organizational Acumen” are addressed in the curriculum (inside the classroom) for your Adult Education department? Specific examples could include classroom exercises, assignments, learning outcomes, etc. Which of these competencies are addressed and developed in the co-curricular (outside the classroom) elements of your department? Specific examples could include study abroad, participation in campus organizations, attendance at conferences, etc.</td>
</tr>
<tr>
<td>RQ2: Which global leadership competencies are perceived to be the most important by faculty and administration of the selected adult education graduate programs in the United States and Western Europe? Similarly, which global leadership competencies are perceived to be less important by the interviewees?</td>
<td>IQ 9. In terms of Adult Education graduate study at the institution, which of these competencies do you perceive to be the most important to the future success of your students after graduation? Why do you feel this think this way about the competencies you selected? Do you think that any of the competencies are not relevant for the Adult Education graduate program? Why not?</td>
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### Appendix K (Continued)

Table K1 (continued)

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<th>Interview Question</th>
</tr>
</thead>
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<tr>
<td><strong>RQ 3</strong>: What are the reported practices to develop global leadership competencies in the selected adult education graduate programs in the United States and Western Europe?</td>
<td>IQ 3. Are you familiar with the 2008 Standards for Graduate Programs in Adult Education, published by the Commission of Professors of Adult Education, which include among others the following 2 standards: (a) Study of leadership, including theories or organizational leadership, administration, and change; and (b) Analysis of globalization and international issues or perspectives in adult education?</td>
</tr>
<tr>
<td></td>
<td>IQs 6-8. Looking at the diagram of Bird’s (2013) Framework of Nested Global Leadership Competencies, which of the competencies under the category “Managing Self”, “Managing People and Relationships, and “Business and Organizational Acumen” are addressed in the curriculum (inside the classroom) for your Adult Education department? Specific examples could include classroom exercises, assignments, learning outcomes, etc. Which of these competencies are addressed and developed in the co-curricular (outside the classroom) elements of your department? Specific examples could include study abroad, participation in campus organizations, attendance at conferences, etc.</td>
</tr>
<tr>
<td><strong>RQ 4</strong>: Based on the researcher’s analysis of the data, what are the similarities and differences in the development of global leadership competencies between the selected adult education graduate programs in the United States and those of Western Europe?</td>
<td>IQ 1. Please describe one of the best experiences you have had in your current position as a faculty member in Adult Education.</td>
</tr>
<tr>
<td></td>
<td>IQ 2. Describe a recent experience in your career in Adult Education that made you feel enthusiastic or excited about the future for the field of Adult Education.</td>
</tr>
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Appendix K (Continued)

Table K1 (continued)

<table>
<thead>
<tr>
<th>Research Question</th>
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<tr>
<td>IQ 3. Are you familiar with the 2008 Standards for Graduate Programs in Adult Education, published by the Commission of Professors of Adult Education, which include among others the following 2 standards: (a) Study of leadership, including theories or organizational leadership, administration, and change; and (b) Analysis of globalization and international issues or perspectives in adult education?</td>
<td></td>
</tr>
<tr>
<td>IQ 4. Can you recall or describe an experience in Adult Education on the international scene in your academic career?</td>
<td></td>
</tr>
<tr>
<td>IQ 5. What does the term “global leadership” mean to you?</td>
<td></td>
</tr>
<tr>
<td>IQ 6 – IQ 8. Key Questions</td>
<td></td>
</tr>
<tr>
<td>IQ 9. In terms of Adult Education graduate study at the institution, which of these competencies do you perceive to be the most important to the future success of your students after graduation? Why do you feel this think this way about the competencies you selected? Do you think that any of the competencies are not relevant for the Adult Education graduate program? Why not?</td>
<td></td>
</tr>
</tbody>
</table>

Note: RQ = research question; IQ = interview question.
Appendix L: Excerpts from Researcher’s Reflective Journal

January 21, 2015

It was clear to me that the examples I have been reading of qualitative dissertations from other students who have defended in this department had one major difference from my dissertation. Serena’s dissertation in particular was based on grounded theory, and I thought that was the standard for thematic analysis in qualitative work. What the Tracy (2013) book has taught me, however, is that there are many other ways to approach the analysis. And reviewing them all, I realize that because I am analyzing my data against an existing model or conceptual framework, rather than letting the themes emerge directly and solely from the interview data, the approach which best describes my thematic analysis will be iterative. According to Tracy (2013), an iterative approach constantly shifts between the emic analysis of the data (describing the themes which emerge from the data themselves) and the etic use of the existing framework which I am using for the study. Because I will be using the 15 competencies associated with Bird’s (2013) framework of nested global leadership competencies as the a priori categories for the first level of coding and analysis, and because I will be constantly going back and forth between the original data from the interviews and comparing it to the framework, the description that I need to use regarding the data analysis for my proposal is an iterative approach, rather than a grounded theory approach. As Tracy stated, “Iteration is not a repetitive mechanical task, but rather a reflexive process in which the researcher visits and revisits the data, connects them to emerging insights, and progressively refines his/her focus and understanding” (p. 184).
Appendix XX (continued)

This describes exactly what my intentions are regarding the first two research questions.

March 19th, 2015

Defended my dissertation proposal today. Although I was very happy with the outcome, I felt a bit defensive regarding my interview protocol. We discussed so much about it at the pre-defense, but Dr. X really hammered me with regards to the specific wording of the questions. I suppose I should feel good that the committee didn’t really have any problems with the methods, and by focusing on the interview protocol, they were able to address details that is still a work in progress. Still, I do believe that the interview protocol is better now as a result, although it is too long, I believe.

Also, I was so happy that Dr. Y suggested I don’t need to do the full-on double level peer reviewer progress. When he said “10%”, I almost fell on the floor in excitement. I feel like that is going to take at least two months off of the analysis process!

April 2nd, 2015

All of the interviews are scheduled. I still don’t know if I’m going to be able to fly to Europe yet, but I’m so grateful that all of the participants seem to be so enthusiastic in their support for my study.
Appendix XX (continued)

April 30\textsuperscript{th}, 2015

Just finished the first two interviews for the study. They went well, and I will get started on the transcription tomorrow. Dr. Fulton didn’t think she would be able to discuss much about the category Business and Organizational Acumen, but I think she was pleasantly surprised with how much she was able to delve into. Dr. Ursery, however—Wow. I really disagreed with some of the things he had to say. My experience is that each and every travel experience strengthened not only my global mindset, but also my personal connection to mankind. I know that sounds a bit dramatic, but when he said that traveling to another country gives one a skewed impression of the culture and that the best way to become more culturally savvy is to have them come visit you—Well, I just completely disagree with that. I know that I have to put that into the dissertation because it is an important divergent opinion from everything I have ever read, heard, or experienced, but do I comment about it in the manuscript? Keep an eye on how you address that in your findings, Ray.

June 11\textsuperscript{th}, 2015

Just finished the two interviews for my Italian participants. Such lovely, incredible people. I was surprised at how challenging they found the system of higher education. All their superiors care about is their research agenda. Their work with the students seem to be the bottom priority in all of their responsibility. Also, Dr. Callaway’s
Appendix XX (continued)

comment that all of the professors must “own” their courses and maintain a kind of secrecy so that they are not able to be shared with anyone else, I believe, is one of the best data points that emerged from the interview. The complete indifference to the cultural competencies of cross-cultural communication and global mindset were also surprising to me. I think this is going to be an exciting write-up.

June 30th, 2015

I just finished my final interview! Fourteen interviews from seven institutions in four countries. Wow! Dr. Kilpatrick’s sense of humor was dry, hilarious, and, at times, off-putting . . . but wow did she provide some amazing data points. There is really a disconnect from the ways in which I view leadership and the ways in which it is often perceived throughout the world. This is important. I want to make it a great word again. I want to help people understand that everyone can be a global leader, regardless of their position or authority. I don’t know what I’m going to do with that yet, but there is definitely something there to work with. My reflections following the completion of all of these interviews is that I don’t know yet what it all means, but I feel a sense of themes starting to emerge before I even do the transcriptions. I think my interview protocol was excellent, although it covered much more information than I really needed to cover. Perhaps, that will be helpful with writing other articles in the future.
Appendix XX (continued)

March 16th, 2016

My dissertation defense is one week away. I just finished putting together the PowerPoint presentation, and it really helped me review the entire process again. I incorporated something in the presentation that I did not put in the dissertation manuscript, and I want to put it here for future reference. I talked in the manuscript about the consistent movement across all themes from a micro- to a macro-level thinking with regards to the three broad categories of Bird’s (2013) framework of nested global leadership competencies. I created the following slide to describe the baby step beginnings of a new model for global leadership competency development for adult education graduate programs. I remember reading an article about how to create a model empirically, and I need to go back and find that article to see what I can do with it, but this is the first step in the creation of that kind of construct.
Appendix M: Worksheet to Document the Themes Derived From the Research Questions of the Multiple Case Study

<table>
<thead>
<tr>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theme 1: Global leadership competencies addressed.</td>
</tr>
<tr>
<td>Theme 2: Global leadership competencies perceived most important.</td>
</tr>
<tr>
<td>Theme 3: Global leadership competencies perceived less important.</td>
</tr>
<tr>
<td>Theme 4: Reported curricular practices to develop global leadership competencies.</td>
</tr>
<tr>
<td>Theme 5: Reported co-curricular practices to develop global leadership competencies.</td>
</tr>
<tr>
<td>Theme 6: Similarities across all cases of global leadership competencies.</td>
</tr>
<tr>
<td>Theme 7: Differences between adult education graduate programs located geographically in the United States and those located in Western Europe.</td>
</tr>
</tbody>
</table>

**Figure M1:** Worksheet to Document the Themes Derived from the Research Questions of the Multiple Case Study. *Note:* Adapted from Stake (2006).
**Appendix N: Example of Codes and Associated Transcription Lines.**

<table>
<thead>
<tr>
<th>Themes</th>
<th>Codes</th>
<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interpersonal Skills</td>
<td>Curriculum: Interviewing</td>
<td>&quot;One of their assignments is to talk about adult education with someone in the topics that they're learning, and then they have to transcribe those interviews and things like that.&quot;</td>
</tr>
<tr>
<td></td>
<td>Curriculum: Interpersonal Conflict</td>
<td>&quot;... the number one reason that people leave jobs or are fired from their jobs is because they have an interpersonal conflict. It is not because they can't do their job well. It's because they can't get along. These soft skills are very important in today's environment.&quot;</td>
</tr>
<tr>
<td>Cross-cultural</td>
<td>Curriculum: Presentations (different cultures)</td>
<td>&quot;Sometimes the student will pick it as a presentation. They talk about different populations. Last semester, they highlighted ESL learners and some specific people like some folks from Saudi Arabia and Egypt and females.&quot;</td>
</tr>
<tr>
<td>Communication</td>
<td>Global mindset, understanding, tolerance, dialogue</td>
<td>&quot;... goes along with the idea earlier of having that global mindset and being able to understand someone else's perspective.&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;And then, in Workforce Education, we go to the Kia plant every year for a field trip, and so they're able to see how Kia runs their plant. It's very much a Korean company, with American workers but a lot of Korean management—and what that looks like in terms of safety, training, exercise, just... different.&quot;</td>
<td></td>
</tr>
<tr>
<td>Teaming Skills</td>
<td>Curriculum: Presentations, Paper, Online Discussion Boards, Discussion Moderators</td>
<td>&quot;...&quot;</td>
</tr>
<tr>
<td></td>
<td>Normative: Interconnected with other competencies.</td>
<td>&quot;... it's difficult; that's a difficult one. Maybe you are able to understand that there's a different culture in cross-cultural communication, but to value those people and their opinions can be very difficult.&quot;</td>
</tr>
<tr>
<td>Valuing Others</td>
<td>Difficult</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Curriculum: Choose topics for dialogue</td>
<td>&quot;For instance, in The Disadvantaged Learner course, they get to choose a topic and they also get to dialogue about it on the discussion board...&quot;</td>
</tr>
<tr>
<td></td>
<td>Curriculum: Guest speakers</td>
<td>&quot;I do use guest speakers in there because they can really add a whole new component. I mean I have guest speakers in all of my classes when I have a specific topic. Sometimes it works out well and sometimes it doesn't. Most cases it does and I invite those people back.&quot;</td>
</tr>
</tbody>
</table>
Appendix O: Copy of Consent Form Signed by Primary Peer Reviewer

Peer Reviewer Form

I, ____________, have served as a peer reviewer for “A Multiple Case Examination of Global Leadership Competencies in Selected Adult Education Graduate Programs from the United States and Western Europe,” by Arthur Ray McCrory. In this role, I have worked with the researcher in identifying emerging themes from participant interviews and validation of thematic analysis.

Signed: ____________ Date: __2-18-16__________

Signed: Melanie L. Wicinski

Date: 2-18-16
Appendix P: List of Supplemental Peer Reviewers

Table P1

*Supplemental Peer Reviewers*

<table>
<thead>
<tr>
<th>Name</th>
<th>Current Position</th>
<th>Gender</th>
<th>Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mousa Alfaifi</td>
<td>Ph.D. Student</td>
<td>Male</td>
<td>Adult Education Research and Measurement Bi-cultural Relationships – Saudi Arabia</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rozelia Kennedy</td>
<td>Ph.D. Student</td>
<td>Female</td>
<td>Adult Education Research and Measurement Bi-cultural Relationships – Caribbean</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caitlin McKeown</td>
<td>Ph.D. Student</td>
<td>Female</td>
<td>Adult Education Research and Measurement Intercultural communication - Deaf culture</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nadia Nachabe</td>
<td>Ph.D. Student</td>
<td>Female</td>
<td>Adult Education Research and Measurement Global Leadership/Entrepreneurship Lebanon</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharlene Smith</td>
<td>Ph.D. Student</td>
<td>Female</td>
<td>Adult Education Research and Measurement Bi-cultural Relationships – Bahamas</td>
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<tr>
<td></td>
<td>University of South Florida</td>
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<td></td>
</tr>
<tr>
<td>Muhittin Cavusoglu</td>
<td>Ph.D. Student</td>
<td>Male</td>
<td>Adult Education Research and Measurement Bi-cultural Relationships – Turkey</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joe Askren</td>
<td>Ph.D. Student</td>
<td>Male</td>
<td>Adult Education Research and Measurement International education</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cynthia Edwards</td>
<td>Ph.D. Student</td>
<td>Female</td>
<td>Adult Education Research and Measurement International education Military education</td>
</tr>
<tr>
<td></td>
<td>University of South Florida</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix Q: IRB Approval Letter

April 9, 2015

Arthur McCrory, Jr.
L-CACHE - Leadership, Counseling, Adult, Career & Higher Education
Tampa, FL  33605

RE: Expedited Approval for Initial Review
IRB#: Pro00021577
Title: A Multiple-Case Examination of Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe


Dear Mr. McCrory:

On 4/8/2015, the Institutional Review Board (IRB) reviewed and APPROVED the above application and all documents outlined below.

Approved Item(s):
Protocol Document(s):
A Multiple-Case Examination of Global Leadership Competency Development in Selected Adult Education Graduate Programs in the United States and Western Europe

Consent/Assent Document(s)*:
Informed Consent Form - Adult Minimum Risk.docx pdf

*Please use only the official IRB stamped informed consent/assent document(s) found under the "Attachments" tab. Please note, these consent/assent document(s) are only valid during the approval period indicated at the top of the form(s).

It was the determination of the IRB that your study qualified for expedited review which includes activities that (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the categories outlined below. The IRB may review research through the expedited review procedure authorized by 45CFR46.110 and 21 CFR 56.110. The research proposed in this study is categorized under the following expedited review
Appendix Q: (continued)

(6) Collection of data from voice, video, digital, or image recordings made for research purposes.

(7) Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

As the principal investigator of this study, it is your responsibility to conduct this study in accordance with IRB policies and procedures and as approved by the IRB. Any changes to the approved research must be submitted to the IRB for review and approval by an amendment.

We appreciate your dedication to the ethical conduct of human subject research at the University of South Florida and your continued commitment to human research protections. If you have any questions regarding this matter, please call 813-974-5638.

Sincerely,

[Signature]

Kristen Salamon, Ph.D., Vice Chairperson
USF Institutional Review Board
About the Author

Arthur Ray McCrory, Jr. received his Ph.D. from the University of South Florida (USF). Arthur was a commissioned officer in the United States Navy and served as a Peace Corps Volunteer in Eastern Europe. He lived abroad for over a decade, coordinating training and community development projects in Central and South America; and Western and Eastern Europe, where he established a successful entrepreneurial client base for executive communication coaching and language training. His extensive international experience informs his research agenda into leadership development in a global context, cross-cultural communication, program evaluation, and talent development.

Arthur received a two-year fellowship from the USF Graduate School Doctoral Student Leadership Institute. He has presented his research in global leadership multiple times at the Commission for International Adult Education (CIAE), and the American Association for Adult and Continuing Education (AAACE) conference. He has published articles in international peer reviewed journals, as well as co-authored a book chapter on an evaluation of a community/school partnership program. Arthur also teaches multiple courses at USF and developed the global leadership course for the university.