

**INTEGRATING LEADERSHIP AND SPIRITUALITY IN THE WORKPLACE  
THROUGH COALESCING VALUES AND IDENTITY TRANSFORMATIONS**

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### **Abstract**

This paper delivers, through a series of increasingly complex models, a theoretical framework aimed at the integration of leadership and spirituality. After identifying a number of contemporary leadership theories with significant spiritual components, a typology of values derived from emergent theories of leadership including spiritual, servant and authentic leadership theory as well as the positive psychology movement is proposed. Values, identities, leadership and spirituality are brought together in a model of a spiritually anchored workplace. More specifically, the integration of leadership and spirituality is attained through coalescing hierarchically structured values ranging from first to higher order values and a series of identity transformations that reflect the leader's cognitive, psychological and emotional maturity from the development of self identity, to collective identity where the leaders are prototypical of the groups they lead and culminating in spiritual identity. A discussion of the contributions of this research to the extant leadership and spirituality literature is presented.

## **INTEGRATING LEADERSHIP AND SPIRITUALITY IN THE WORKPLACE THROUGH COALESCING VALUES AND IDENTITY TRANSFORMATIONS**

### **Introduction**

Spirituality has been bubbling close to the surface in business during the last few years. We have seen a rush of books on spirit, soul and love. God made the cover page of Fortune Magazine (Gunther, 2001). Conlin (1999) summed up the spiritual hunger of the postmodern workforce when he states, "Just as industrialization gave rise to social liberalism, the New Economy is causing a deep seated curiosity about the nature of knowledge and life, providing a fertile environment for this new swirl of non-materialistic ideas" (p. 156). Organizations are complex entities that claim more hours a week than most other social domains. For better and for worse, work is the centerpiece in many people's lives. The impact of globalization, technological 24/7 connectedness with its ubiquity of communications, consumerism with its ability to change wants into needs, and the business ownership of the media have accelerated the pace and lengthened the day for most of us in the developed economies. These currents, which define many workplaces today are also sources of pressures contemporary leaders are confronted with, as they search for meaning and purpose beyond satisfaction of basic needs and extrinsic rewards.

Whether we like it or not, work is inextricably intertwined with our perpetual search for meaning. Scholars (e.g., Emmons, 1999; Fowler, 1981; Helminiak, 1986, 1987; Maslow, 1971; Thompson, 2000) have suggested that the search for meaning in life involves an individual's pursuit of whole person development, striving for personal goals, and behaving with integrity. Work is a key in our search for ultimate meaning (Mitroff, 2003) and an integral part of our spirituality. Organizations are developing into spiritual arenas where employees seek an environment that supports expressions of spirituality and spiritual practices. Hendricks and Ludeman's (1997) also make the business environment, not the church, the stage for the practice of spirituality. The authors describe 'corporate mystics' as street saints and front-line visionaries whose character is grounded in a spirituality that rests on honesty, fairness, and commitment to self-knowledge. The authors suggest that such individuals are more likely to be found in a board room than the monastery or cathedral. Thus it appears that the global business community, not

the church, is providing a platform for the satisfaction of spiritual needs. Conlin (1999) concluded “a spiritual revival is sweeping across America as executives of all stripes are mixing mysticism into their management, importing into office corridors the lessons usually doled out in churches, temples and mosques” (p. 150).

In an era of corporate malfeasance and individuals' quest for meaning and higher purpose, corporations are beginning to recognize the importance of attending to the spiritual needs of employees at the workplace. Mitroff and Denton (1999), in their spiritual audit of corporate America, found in their interviews that people want to bring their whole selves to work especially wanting to develop and express their soul and spirit at work. They are tired of the buzzwords, the endless parade of management fads, guru tricks and gimmicks that promise relief from stress and physical and mental well being. Many of the negative work experiences such as downsizing, isolation, distrust, or lack of sense of community have been cited to account for the search for greater meaning in the workplace (Cash & Gray, 2000). These negative experiences create a hunger for a deeper meaning in life, a need for finding an anchor, and a desire for greater integration of a person's work and personal identities (Thompson, 2000). Failure to satisfy the need for meaningful work is often the root cause of organizational dysfunctions and ineffectiveness. As a result, some companies are responding to their employees' search for deeper meaning in the workplace by hiring chaplains, supporting prayer groups, or teaching employees about meditation (Conlin, 1999; Gunther, 2001). Benefield (2005) argues that spirituality reorients an organization to its higher purpose, and when the higher purpose is no longer served, a spiritually oriented organization will either restructure itself to serve that higher purpose or, if necessary, allow itself to die so that new forms can emerge that will serve the higher purpose (p. 736).

Research on workplace spirituality suggests that work contributes to the spiritual well being of employees, enhances the quality of their lives and the degree of satisfaction they derive from work. As a result, empirical studies of spirituality in organizations are gaining ground (e.g., Ashmos & Duchon, 2000; Giacalone & Jurkiewicz, 2003; Giacalone, Jurkiewicz & Fry, 2005; Milliman, Czaplewski & Ferguson, 2003; Mitroff & Denton, 1999). For example, Milliman et al.

(1999) found that inspired leadership characterized by efforts to create and sustain community and caring at the workplace can benefit the organization as well as the individual employee. Other research (e.g., Hartsfield, 2005; Milliman, Czaplewski & Ferguson, 2003; Milliman, Ferguson, Trickett, & Condemni, 1999; Mitroff & Denton, 1999; Neck & Milliman, 1994) has shown that spirituality correlates positively with worker attitudes such as work satisfaction, job involvement and organizational commitment as well as transformational leadership.

Empirical studies have also shown that certain dimensions of workplace spirituality such as meaning making, meditation, and sense of mission relate positively to productivity (e.g., Garcia-Zamor, 2003). Similarly, Duchon and Plowman (2005) reported data from six work units from five hospitals which showed that the top performing units had higher spirituality scores than the bottom three performing units, thereby establishing an empirical relationship between the spiritual climate of a work unit and its overall performance. The authors describe such an organizational climate as one in which people view themselves as having an inner life that is nourished by meaningful work, which takes place in the context of community. The positive outcomes of promoting spirituality in the workplace may benefit companies as well as their employees. Companies known for their strong corporate cultures or spiritually anchored workplaces have been found to economically outperform others in investment return and shareholder value (Thompson, 2000). Similarly, Mitroff and Denton (1999) conclude from their spiritual audit of corporate America that the most significant finding was that organizations perceived as 'more spiritual' or 'having a greater spiritual orientation were also seen as being significantly more profitable.

There is also evidence that spirituality in the workplace creates a new organizational culture that emphasizes community where employees feel happier and perform better. Mandela (1995) reminds us that leaders must be coaches and architects of culture. Employees may feel that belonging to a community, which is an important aspect of spirituality, helps them to cope more effectively with the daily wear and tear of the job. Taken together, these studies suggest that when employees find meaning in their work, they become more engaged, more responsible, more ethical, and more creative. If the organization is spiritually anchored, it is more likely to

avoid situations of ethical misconduct. Being in touch with spiritual principles and values helps individuals to stimulate their moral imagination and can provide greater depth of understanding of many ethical problems that arise at work. Conversely, organizations devoid of a spiritual foundation which deny employees the opportunity for spiritual expression through their work may incur losses and costs resulting from increased turnover or decreased productivity (Gull & Doh, 2004).

The purpose of this paper is threefold; (1) to identify leadership theories with strong spiritual constructs; (2) to develop a typology of values that connect leadership and spirituality; and (3) to present a model of a values-based, spiritually anchored workplace that provides a theoretical framework for exploring the linkages between leadership and spirituality through shared values and identity transformation. The model introduces several new constructs to include opportunity structures for spiritual development and transcendent capital.

### **Spirituality and Leadership**

Spirituality is defined here as workplace spirituality or “a framework of organizational values evidenced in the culture that promotes employees’ experience of transcendence through the work process, facilitating their sense of being connected in a way that provides feelings of compassion and joy” (Giacalone & Jurkiewicz, 2003, p. 13). This definition acknowledges the multifaceted nature of the construct since spirituality has been conceptualized as a set of resources, capacities, or abilities that are evolving and developing and interact with the external environment. La Pierre (1999), who also operates from a multidimensional framework, identifies the following components of spirituality: (a) a search for meaning in life; (b) an encounter with transcendence; (c) a sense of community; (d) a search for ultimate truth, or highest value; (e) a respect and appreciation for the mystery of creation; and (f) a personal transformation. Although not all conceptualizations of spirituality include transcendence, it is one of several foundational concepts in construct definitions of spirituality. For example, Emmons (1999) points out that in common parlance spirituality is typically thought to encompass a search for meaning, for unity, for connectedness to nature, humanity and the transcendent (p. 877).

The elusiveness of the spirituality construct – whether approached from secular, spiritual psychological or any other perspective suggests that the search for an omnibus definition may be futile. Yet despite a lack of consensus, definitions of spirituality abound. Estanek (2006) examined definitions of spirituality located in the literature on spirituality in higher education and conducted a content analysis to uncover common themes. The author identified five non-redundant themes: (1) spirituality defined as spiritual development; (2) spirituality used as a critique; (3) spirituality understood as an empty container for individual meaning; (4) spirituality understood as common ground; and (5) spirituality as quasi-religion. Estanek concluded that these definitions reflect a new discourse in which definitions are part of the hermeneutic process. In other words, defining spirituality is part of the interpretation itself. Although many definitions of spirituality have been offered, many suggest that spirituality connotes a personal connection to something subjectively meaningful and larger than oneself, as transcendence of self (e.g., Emmons 1999; Mitroff & Denton, 1999).

Despite the divergence of definitions, the following areas of agreement reflect a certain degree of convergence in conceptualizations of spirituality. Researchers have concluded that spirituality; (1) is an inherent aspect of human nature; (2) emphasizes growth and development; (3) celebrates one's connection to a force or entity greater than self; (4) respects the inherent value of people; (is seen as a quest or journey); and (6) is manifested through the lives of spiritual people; (7) a channel for connecting with a theistic God (e.g., Delbecq, 1999; Fairholm, 1998; Fry, 2003; Mitroff & Denton, 1999; Neal 2000; Neck & Milliman, 1994; Roof, 1993; Spohn, 1997; Zinnbauer et al., 1997). Regardless of underlying philosophical foundations, most conceptions of spirituality embody notions of a path, journey, and process, which are deeply individual, communal, and multidimensional, and often imply a developmental sequence. They acknowledge that there is some sort of power beyond human existence that humans develop in trying to make sense (meaning-making) of their existence in light of this power. Because spirituality is defined as a connection with the transcendent, seemingly small acts can have enormous personal meanings if they are indeed perceived to have such a connection (Emmons, 1999). However, the meanings of construct definitions found in a multidisciplinary body of literature vary greatly and are often

vague and lack clarity, which makes it difficult to operationalize them. Table 1 depicts some definitions of spirituality to highlight the diversity of conceptualizations of spirituality

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Discussions, dialogues and empirical research on leadership and spirituality have moved to center stage in the research literature and popular press. A leader's spirituality and values fundamentally affect their leadership style and their interactions with followers. They powerfully influence the leader's moral character and thereby affects perception, motivation, and choice. Bass and Steidlmeier (1999) asserted that leadership provides a moral compass and that over the long run both personal development and the common good are best served by a moral compass that reads true (p. 193). The notion that spirituality only belongs into the private life of the leader and has no place in the public sphere of business overlooks that the business world, like leadership, is not value neutral. To pretend that the business realm is a spiritually neutral zone is to overlook the value placed in Western cultures on materialism and success and their tremendous power to entice and coerce.

Several leadership researchers have posited a connection between leadership and spirituality. Theories of spiritual leadership (e.g. Fairholm, 1991, 1998, 2001; Fry, 2003, 2005) have emerged that propose that spirituality gives rise to unique forms of leadership. Fry (2003), for example, proposed a theory of spiritual leadership in which the construct is defined as "comprising the values, attitudes, and behaviors that are necessary to intrinsically motivate one self and others so that they have a sense of spiritual survival through calling and membership." The author contends that spiritual leadership "taps into the fundamental needs of both leaders and followers for spiritual survival so they become more organizationally committed and productive" (p. 711). The author puts forth a framework of spiritual leadership that is rooted in theories of leadership and motivation such as path-goal, transactional and transformational leadership and presents a causal model which treats leader values, behaviors, and attitudes and follower needs for spiritual survival as predictors of organizational outcomes such as commitment

and productivity. Fry's theory of spiritual leadership is offered from an intrinsic motivation perspective that incorporates vision, hope/faith and altruistic love and includes two specific spiritual needs: a sense of vocational calling and social connection. More specifically, the model treats calling as a key dimension of spiritual leadership and postulates that followers are motivated by a leader who meets their spiritual needs. This is accomplished by creating a vision that provides a sense of calling and establishing an organizational culture based on altruistic love and genuine care for others. Yet, while much is being said about the role of spirituality in leadership, we still have little evidence of how it works, and which aspects promote or hinder its utility as a dynamic organizational force (Markow & Klenke, 2005).

Table 2 presents some spiritual constructs that are also embedded in a number of contemporary leadership theories. Theoretically, spirituality is embedded in servant leadership (Greenleaf, 1977, 1998), stewardship (Block, 1993), and authentic leadership (Klenke, 2005, 2006a). In these theories, leadership depends in part on the spiritual perspectives, values, and assumptions of leaders and how these perspectives connect them with their followers. Furthermore, definitions of leadership have included concepts such as compassion, empathy, healing, heart, and followership (e.g., Greenleaf, 1998; Judge, 1999; Kouzes & Posner, 2003; Laabs, 1995). These concepts also fall into the spiritual realms and involve meaning, values, connectedness to something bigger; a bigger "why." The power of these dimensions is unquestionable. People go to war for ideals, purposes, and beliefs that have little to do with actual needs.

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### **Integrating Leadership and Spirituality through Value Coalescence**

Values and worldviews are implicit in most spiritual traditions. They also play a critical role in leadership. All leaders appeal to values. Thatcher appealed to material values and captured the hearts and votes of the growing British middle class: home ownership, individual self-determination, and the rights of capital over labor. Mandela appealed to values such as freedom, equality, human dignity, and democracy and provided much of his leadership of the

change in South Africa from his jail cell. Christ and Buddha appealed to values such as compassion and forgiveness – proponents of the positive psychology movement talk about these values today.

People long for environments where they can feel safe enough to be honest and where values and people are more important than profits. Yet despite the resurgence of spirituality and manifestations of an increasing desire for a more holistic lifestyle (e.g., Graves & Addington, 2002; Gunther, 2001; Mitroff & Denton, 1999), the leadership literature is essentially devoid of discussions of spiritual values. Schwartz (1992) defines values as, “desirable states, objects, goals, or behaviors transcending specific situations and applied as normative standards to judge and to choose among alternative modes of behavior” (p. 2). This definition has implications for spiritual values because it highlights the two important functions of values. First, because they are enduring and transcend situations, values can provide coherence and a sense of purpose to an individual's behavior. Purpose and meaning are inherent in many definitions of spirituality. Second, because values are normative standards, they form the basis for generating behaviors that conform to the needs of the group or larger social unit (Lord & Brown, 2001). These functions tap into the role of community in spiritual values since creating a sense of community is at the core of many spiritual practices.

Numerous value typologies have been developed (e.g., Agle & Caldwell, 1999) and the integration of personal and organizational values has been widely discussed. Yet research on values has neglected the role spiritual values play in the life of the individual leader, the followers, the organization and society at large. Recently, it has been suggested that spirituality and the enhancement of one's awareness through transcendent experiences are unequivocally prerequisites for leadership, just as they are for intelligent, effective, creative, and truthful living (Rabbin, 1998; Vaill, 1998). Values of truth, charity, humility, self-surrender, forgiveness, gratitude, courage, faith, service and compassion (Fry, 2003; Giacalone & Jurkiewicz, 2003) are not only found in the leadership and spirituality, but are also rooted in the major religious traditions.

In this section, fundamental values found in leadership and spirituality are presented to facilitate the integration of values internal to the leader and contingent upon the leader's level of being. The major spiritual traditions provide role models and paths for the discovery of meaning, how to be and lead in a world where most organizational members are seeking ways to live true to their inner individual values, which ideally are congruent with organizational values (Kriger & Seng, 2005). In order to enable spirituality, organizations need to articulate universal values as frameworks within which individuals can pursue their need for transcendence and fulfillment (Milliman et al., 2003). They can also take steps toward fostering spirituality by identifying incongruities between espoused values and values in use, and then correct these discrepancies (Fry & Cohen, 2009).

The value typology presented consists of two levels: (1) first order values including hope, truth, compassion, moral courage, integrity, empathy, kindness, humility, altitude and gratitude; and (2) higher order values including self-transcendence and self-sacrifice.

### ***First-order values***

First order values are embedded in a number of emergent theories of leadership including authentic, spiritual, and servant leadership. They are also widely discussed in the positive psychology movement spearheaded by Seligman (1999), Csikszentmihayli (1990) and Luthans (2002a). According to Seligman (1999, Seligman & Csikszentmihayli, 2000) and a core group of other well known research-oriented positive psychologists including Diener (2000), Peterson (2000) and Snyder (2000), the aim of positive psychology is to shift the emphasis away from what is wrong with people to what is right with them – to focus on strengths (as opposed to weaknesses), be concerned with resilience (as opposed to vulnerability) and enhancing and developing wellness, prosperity, happiness, and the good life (Luthans, 2000b). Indeed, for psychologists, anything positive about people – hope, optimism, altruism, joy, courage, and fulfillment were suspect and treated as indicative of a mental disorder. The positive psychology movement represents the antithesis of psychology's recognized mission built on deficit models, a disease model of human nature, a paradigm shift accentuating human strengths instead of attending to diagnosis and treatment of pathologies, deficiencies and dysfunctions of human

behavior. The constructs, shown in Figure 1, like most concepts found in leadership and spirituality, function at different levels of analysis, which have been summarized by Seligman and Csikzentmihalyi (2000) as a subjective level (i.e., positive traits such as the capacity for love, courage, aesthetic sensibility, perseverance, forgiveness, spirituality, and wisdom) and a macro group and institutional level (i.e., positive civic virtues and the institutions that move individuals toward better citizenship, altruism, civility, moderation, and a strong work ethic).

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### ***Higher-order values***

The primary higher order values of particular relevance to spiritual traditions are self-transcendence and self-sacrifice. They are higher order values analogous to Maslow's metaneeds, which expand the hierarchy of needs beyond self-actualization and include, for example, the need for beauty, liberty, equality or justice. As in the Maslowian hierarchy, higher order values in this two-fold typology are prepotent over first order values. The higher-order level of the typology proposed here is also consistent with considerable research showing that values show patterns of organization or coherence. For example, Schwartz (1999) identified seven specific value types which are organized through higher-level patterns into a circumflex configuration. Empirically, a circumflex organization of values was validated by Ros, Schwartz and Surkiss (1999) who reported two higher level dimensions – openness to change versus conservatism and versus self-enhancement versus self-transcendence. The relevant higher-order dimensions in this research are self-enhancement versus self-transcendence and self-benefits versus self-sacrifice.

*Self-transcendence.* Self-transcendence, a foundational construct in several definitions of spirituality, has a long pedigree in the theological, psychological literature, and more recently also appeared in leadership research (e.g., Carey, 1992; Lord & Brown, 2001). The concept is found in the scriptural texts and traditions of most of the world's major religions. It has been defined as the capacity of the individual to stand outside their immediate sense of time and place and to view life from a larger, more objective perspective (Piedmont, 1999, p. 988). Maslow (1971), who

described thirty-five potential meanings of the concept of transcendence, offered the following definition:

Transcendence refers to the very highest and most inclusive or holistic level of human consciousness, behaving and relating, as ends rather than as means, to oneself, to significant others, to human beings in general, to other species, to nature, and to the cosmos (p. 279).

Maslow (1971) suggested that “the human being is so constructed that he [or she] presses toward fuller and fuller being, and this means pressing toward what most people would call good values, toward serenity, kindness, courage, knowledge, love, honesty, unselfishness and goodness (p. 125)”. These values are also the focus of Burns’ transforming leadership that moral leadership attempts to facilitate. Carey (1992) introduced the term fundamental option to refer to a leader’s stable orientation toward either self-transcendence or self-embeddedness. The author posits that leadership flowing out of a fundamental option for either self-transcendence or self-embeddedness can proceed from the factors associated with either transformational or transactional leadership as defined by Bass (1985). However, only the fundamental option for self-transcendence leads to moral leadership as Burns (1978) has described it. Bass’s approach removed the requirement that change in followers be directed toward higher level values (the position Burns postulated), and so allows for a Hitler as a transformational leader, but at the expense of the self-transcendence necessary to move toward ultimate value (Carey, 1992, p. 225).

From a spiritual perspective, Conn (1981) notes that self-transcendence refers to “the threefold achievement of ‘moving beyond one’s own self’ that is effected in every instance of correct understanding (cognitive), responsible decision (moral), and genuine love (affective)” (p. 6). Writing from a religious perspective, the author asserts that the religious meaning of spirituality is based on the conception of what constitutes the proper and highest actualization of the human capacity for self-transcendence. Similarly, for Helminiak (1987), authentic self-transcendence is a necessary condition for spiritual development.

Transcendence is not only philosophically and theologically wired into definitions of spirituality; it also expresses itself in concomitant behavioral manifestations. For example, Bateson and Porath (2003) posit that transcendent behavior is self-determined behavior which

overrides constraining personal or environmental factors and effects extraordinary, positive change. According to Ryan and Deci (2000) transcendent behavior can help satisfy a variety of needs such as competence, autonomy, and relatedness. Ultimately self-transcendence may require individuals to engage in self-sacrifice. Conn (1986) notes that “the fulfillment proper to the radical personal desire or drive for self-transcendence may require that one ‘empty’ oneself in the sense of sacrificing the fulfillment of otherwise legitimate desires” (p. 23). A self-transcendent spirituality then, combines cognitive, affective and moral elements and processes which are reflected in many spiritual traditions.

*Self-sacrifice.* Historically, Mahatma Gandhi, Mother Teresa and Martin Luther King demonstrated self-sacrificial leadership. Contemporaneously Suu Kyi of Burma, pro-democracy leader and Nobel Prize winner, spent six years under house arrest fighting for the freedom of her country. Anne Mulcahy, CEO of Xerox sacrificed her personal life to take charge of a corporate turnaround. Other business leaders, as well as political, grassroots, and religious leaders, especially during economic downturns and crises such as 9/11, made selfless contributions that have fueled the interest in the role of sacrifice in leadership (Halverson, Holladay, Kazama, & Quiñones, 2004). As these examples show, leadership often entails suffering since the tasks involved in leadership require physical, mental, psychological, and emotional labor which takes a toll on even the most resilient leader since they are not immune to the pain, internal conflicts and stressors that arise from the need to wear protective masks.

Self-sacrificial leadership goes beyond an individual’s motivation to help others, or being selfless. It has been defined as “the total/partial abandonment, and or permanent/temporary postponement of personal interests, privileges, and welfare in the: (1) the division of labor (by volunteering for more risky and arduous tasks); (2) distribution of rewards which involves giving up one’s fair and legitimate share of organizational rewards); and/or (3) voluntarily refraining from using position power and privileges (Choi & Mai-Dalton 1998, p. 399). If the leader is perceived to be self-sacrificing, perceptions of effectiveness and charisma are positively influenced (Yorges, Weiss, & Strickland, 1999). Self-sacrificial leadership promotes the image of leaders as being willing to incur personal costs to serve the mission of the group and organization, especially when

exposed to external threats or crises. Self-sacrificing leaders deny themselves personal privileges and share pains and hardships with their followers. Many political and grassroots leaders, for instance, have given up their freedom by spending time in prison to demonstrate the severity of their causes (House & Shamir, 1993).

Several authors (i.e., Avolio & Locke, 2002; Burns, 1978; Bass & Steidlmeier, 1999;) have suggested that leaders may be willingly sacrifice for the collective good of their work group, organization, or society at large. For example, van Knippenberg and van Knippenberg (2005) argued that being self-sacrificial is probably one of the most direct ways for a leader to state that he or she considers the group's welfare to be important and explicitly shows the leader's commitment to the collective. Moreover, the authors suggest that a leader's self-sacrificing behavior will create pressure on followers to do as is done for them, thereby prescribing what kind of behavior is expected in the light of the group's common cause. Additionally it has been found that self-sacrificial leadership predicts followers' emotional and motivational reactions. Burns (1978) and Bass (1985) suggested that transformational leadership could involve self-sacrificial behaviors for transcendental shifts in the needs of followers.

Self-sacrifice is also manifested in suffering as part of the human condition. Metaphors and narratives of leaders who made the ultimate sacrifice by suffering death, torture or persecution for a higher purpose are embedded in the traditions and writings of the three major Western religions (Judaism, Christianity, and Islam) and the two major Eastern religions (Buddhism and Hinduism). Paramshwar (2006), qualitatively studied ten world renowned transformational leaders, historical and contemporary from different continents, contexts, professions, and religions who pursued a variety of causes ranging from combating gender oppression including institutionalized genital mutilation (Nawal El Saadawi of Egypt) to modeling the poverty of love (Mother Teresa). The author was interested in analyzing how global transformational leaders find their higher purpose. One possibility revealed by the data was the ability of the leader to reframe personal suffering in the light of perceived internal truths. For example, Rigoberta Menchu of Guatemala in her autobiography revealed how she reframed her chronic hunger and cultural oppression in the light of a perceived eternal truth of an exalted

Christian contribution to end injustice. Similarly, Paramshwar's study indicated that Karl Marx's higher purpose of developing a scientific understanding of the causes of economic oppression had its roots in him suffering economic adversity. The world leaders sampled in this study also demonstrated that when confronted by suffering, they reinforced their identification with the suffering of others and reoriented themselves toward serving others by invoking perceived eternal truth.

### **Integrating Leadership and Spirituality through Identity Transformations**

Despite a growing interest in the role of self and identity in leadership studies (e.g., Kegan, 1982; Kernis, 2003; van Knippenberg & van Knippenberg, 2005) researchers know relatively little how leaders and followers construct their identities, how identities are changed and transformed as leaders mature and leadership competencies become increasingly complex and how leaders manage multiple identities. Despite a sizable body of research on "identity work" (e.g., Dickie, 2003; Ibarra, 1999; Van Maanen, 1997) in different contexts, many of the fundamental processes regarding identity construction are poorly understood.

Identity refers to the knowledge leaders and followers have about themselves or the knowledge structure that helps them organize and give meaning to their behaviors and actions (Kihlstrom, Beer, & Klein, 2003). Identity can also be defined as an individual's answer to the question "Who am I?" (Stryker & Serpe, 1982). Many of the "answers" (e.g., "I am a mother", "I am a follower") are linked to the roles we occupy. Baumeister (1986) defined a person's identity as a way of seeing the self and a personal construction or interpretation of the self while Bauman (2004) argued that identity is a simultaneous struggle against dissolution and fragmentation. Several authors (e.g., Markus & Wurf, 1987; Showers & Zeigler-Hill, 2003) assert that a person's overall self is represented as a set of categories, each of which manifests itself as a distinct self or identity such as self as a leader, manager, follower, spouse, or parent. The various roles leaders and followers occupy as well as the groups to which they belong - members of a certain social class, political affiliation, religious group or spiritual community - provide them with definitions of who they are. As Mead (1934) put it, 'a parliament of selves' exists in each person. Identity, in turn, influences behavior in that each role has a set of associated meanings and

expectations for the self. Furthermore, identity themes play themselves out on a multitude of levels: organizational, professional, social and individual and are multidimensional and dynamic.

Identities may be conceptualized as multidimensional, multilevel systems. Klenke (2006a, 2006b) proposed an interrelated network of identity systems to include a self-identity system, a leader identity system, and a spiritual identity system based on higher order values and metaneeds. At the individual level of analysis, the self, self-concept, self-identity and related constructs have been widely discussed in the developmental psychology literature. Leader identity is derived from the leader's self-identity and the human capital he or she brings to the leadership role. At the dyadic level, leader identity involves the construction of new aspects of the self that specifically relate to the leader role. Leader identity may be viewed as the bridge between individual and collective identity since it combines unique, individual characteristics of self-identity along with group-oriented aspects of collective identity. At the collective level, leader identity develops as a function of shared experiences leaders and followers co-create.

The transformation from self-identity to leader identity is intertwined with changes in leadership roles and responsibilities. Erikson (1982), in his classic work, notes that individuals need to understand their various identities before they can change them. Hall (1995) suggests that acquiring a sense of self-esteem is critical to stepping into new identities throughout people's careers. Leaders not only elevate followers to higher levels of morality (Burns, 1978, 2003), provide intellectual inspiration, idealized influence, inspirational motivation and individualized consideration (Bass, 1985; 1998; Bass & Avolio, 1994) but also exemplify and model identity transformations in their own lives and work and facilitate such transformations, especially during critical transitions, in the development of their followers (Klenke, 2006b). To sustain interest for the months and years required to develop and practice complex leadership skills, the leadership role needs to become part of the leader's self-identity. As one's identity as a leader becomes solidified through experience, the self-view as leader becomes a more central aspect of one's identity. In Reichers and Hopkins's (2001) terminology, leaders must be "entrepreneurs of identity."

The second transformation occurs when self- and leader identity begin to incorporate spiritual qualities thereby stimulating the development of a spiritual identity. James (1902) provided an early, yet enduring conceptualization of spiritual identity development. He posited that the development of an individual's identity involves considering two aspects of the self: the "I" (i.e., self-as-subject) and the "me" (self-as-object). An individual's "I" functions consciously and objectively to create and connect the various "me's" and maintain a sense of continuity of self across time. The types of "me" created by the "I" include the "material me" (family, home, belongings), the "social me" (how one is seen and responded to by others), and the "spiritual me" which describes a person's inner life. James (1902) refers to this spiritual me "as the true, the intimate, the ultimate, the permanent me which I seek" (p. 43). It is the highest level of self-organization, more advanced than the material me and social me. The distinction between the I-self and the Me-self has proven amazingly viable and appears as a recurrent theme in many contemporary treatments of the self (e.g., Harter, 1999).

The development of spiritual identity is poorly understood with few existing models to guide researchers. The lack of theories of spiritual identity can be attributed partly to the lack of clarity of definitions of these constructs and partly to the lack of theories of spiritual development to provide a theoretical springboard for the development of the spiritual identity construct. Unlike other theories of human development such as cognitive (Piaget, 1977), ego, (Loevinger, 1976) or moral development (Kohlberg, 1976) for which well-defined theoretical frameworks exist, few theories of spiritual development (e.g., Fowler, 1981; Helminiak, 1986, 1987; Parks, 2000) have been formulated that are comparable in scope to other theories of human development although several theoreticians (e.g., Fowler, 1981; Helminak, 1987) argue that spiritual development is fundamentally human development.

Figure 2 depicts a summary of concepts presented in the previous two sections.

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Insert Figure 2 Here

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## **Toward a Model of a Spiritually Anchored Workplace**

### *Model parameters*

Based on the foregoing discussion, value coalescence and identity transformations are proposed as the two integrative mechanisms through which the integration of leadership and spirituality can be achieved. Based on the commonalities of values found in leadership and spiritualities, the model presented in Figure 3 postulates that leadership and spirituality rest on an infrastructure based on shared first- and higher-order values coherently patterned that are treated as precursors of transcendent identity. More specifically, it is asserted here that the development of self-identity is based on first-order spiritual values (love, humility, empathy, etc.) and the development of spiritual identity is based on higher-order values (self-transcendence and self-sacrifice) to form transcendent identity. Together, the three identity systems – self, leader, and spiritual identity – give rise to transcendent identity built on coalescing values and identity transformations.

Previous research has shown that values and identities can be viewed as relatively enduring criteria used in generating and evaluating behaviors, cognitions, and affect (e.g., Diener & Suh, 1998; Lord & Brown, 2001; Oishi, Schummack, 1998). Consistent with this idea, Oishi et al. (1998), for example, demonstrated linkages between patterns of values and specific identities based on independent and interdependent self-construals. Moreover, the processes of socializing value acceptance and identity development are so intertwined that one cannot be addressed without the other. Therefore, understanding the relationships between identities and values as varied and highly complicated sources of action and motivation is critically important for leaders. Finally, there are reasons to speculate that both values and identities serve important regulatory roles in the formation of transcendent identity.

Identity transformations are not conceptualized as linear paths leading from a firm sense of self-identity to the attainment of a transcendent identity suggestive of a deeper spiritual grounding. A leader's fundamental option for self-transcendence (Carey, 1992), for example, may turn into a fundamental option for self-embeddedness as a response to challenges to his or her spiritual convictions or an organizational crisis, which threatens the leader's survival. Similarly, a

newly promoted middle manager whose self-identity is based work he or she performed as an entry level manager may experience difficulties incorporating his self-identity into a new leader identity. Therefore concepts of progression and regression do not apply to identity transformations. Instead, as hypothesized here, each identity systems represents a configuration of affective, cognitive and motivational forces that combine with spiritual beliefs and practices to fuel identity constructions and transformations.

The previous discussion implies the development of a comprehensive network of relationships between antecedent first- and higher-order values and identities. Research in the healing professions – nursing, medicine, therapy, ministries - illustrates the concept of *opportunity structures* (or lack of) and provides examples of the difficulties of translating spiritual convictions and values into practice. For example, Grant, O'Neil and Stephens (2004) in a study of nurses in a university teaching hospital found that despite the fact that the majority of the nurses indicated a personal interest in spirituality, viewed their work practices as spiritual acts of caring and believed that patient care can be improved by nurses' spirituality, they still had to struggle to find opportunities to practice their spiritual beliefs. For example, less than half of the nurses in this sample indicated that they were comfortable talking about spirituality with fellow nurses and a very small percentage (9%) reported that the topic of spirituality often came up in staff meetings or briefing sessions.

Similarly, Narayansamy & Owens (2001) examined a sample of 115 nurses working in a variety of clinical settings to identify the critical incidents that prompt spiritual care, the types of care, and their outcomes (as perceived by the nurses). The authors concluded that although some spiritual interventions were helpful, they were quite rare and delivered haphazardly. They offered several explanations of this problem, including nurses' limited knowledge and training in this area, the confusion surrounding definitions of spirituality, and reluctance to demonstrate one's spirituality due to professional role definition. Hence, they argue that there remains an urgent need to transform dispirited hospital cultures into more spirited ones. Barnum (1996) posits that the nursing profession arose from spirituality, then turned its back on spirituality, and now is turning back to see what was lost.

Several scholars (e.g., Roof, 1999; Wuthnow, 1995) contend that it is entirely possible to have workplaces in which most employees believe in the caring, spiritual nature of their work, have spiritually engaging experiences, and are comfortable talking about spiritual issues but nevertheless encounter spiritually disengaging experiences or falsely assume that norms are still in place at work that sanction talk about spirituality (Grant et al., p. 270).

Findings of this nature raise important research questions regarding the tensions between spiritually enriched jobs and the opportunity structures in organizations for carrying out spiritual and religious practices in the workplace. In what types of organizations may spiritually engaging and disengaging experiences most prevalent? In a post- 9/11 environment, spiritual issues of life and death have taken on a new urgency but employees often find it difficult to articulate their feelings about these concerns.

The final model, presented in Figure 3 extends the previous discussions by adding additional constructs – *opportunities structures, organizational climate for transcendent development, and transcendent capital*. In spiritually anchored organizations leaders as spiritual guides must be comfortable with the task of creating opportunities structures for employees to express their spirituality and organizational climates (internal environments which support spirituality within the organization and in their external relationships with various constituencies) that foster the free flow of spiritual discourses without infringing on organizational policies that may govern the expression of spiritual values at the workplace. Organizational climate is commonly, although not always, used to describe an organization's policies, practices, rewards, rituals, values, and expectations with respect to a specific focus or outcome (Schneider & Reichers, 1983). Examples of climate foci include team climate (e.g., Ford & Seers, 2006), ethical climate (Dickson, Smith, Grojean, & Ehrhart, 2001), climate for opportunity (e.g., Hayes, Bartle, & Major, 2002) or climate for customer service (e.g., Schneider, White & Paul, 1998). Klenke (2006c) offered the construct of organizational climate for leadership development to refer to the extent to which leader development is rewarded. The more strongly and consistently the organization communicates that leader and leadership development are a priority throughout the organization, the more positive the organizational climate for leadership development. For

example, an organization that provides leaders with 360-degree feedback, leadership training, executive coaching, a formal mentoring program for junior managers, stretch assignments, and personal growth or action learning programs targeted to leaders (e.g., Day, 2001), is more likely to have a positive climate for leader development.

By creating opportunity structures and organizational climates for transcendent development, leaders and followers accumulate transcendent capital which may be thought of as the power, influence, knowledge, and dispositions created by participation in a particular spiritual tradition supported, and respected within the organization. Previous work on organizational climate and emerging work on organizational climate for leadership development can be extended to include *organizational climate for transcendent development*. For example, an organization that nurtures leaders who lead with passion, humility, vulnerability, optimism and hope, offers a climate in which leaders and followers can mature in spirit and faith. Likewise, organizations that foster transcendent well-being by, for example, allowing the pursuit of spirituality at the workplace are positioned to create positive climates that nurture employee growth in a holistic way.

The last model parameter in Figure 3 is *transcendent capital*. This construct is offered here as a heuristic device to connote a new form of capital as a superordinate concept that incorporates financial, human, social, cultural, and spiritual capital. According to Zohar and Marshall (2004), spiritual capital, a related construct, is a vision and model of organizational, cultural, and economic sustainability within a wider framework of community and social concern. Transcendent capital embodies the notion that leaders and followers can deploy spirituality as resources they can draw from in personal and organizational crises, ethical dilemmas, sickness, and times of war or political oppression. These resources are difficult to explain with existing theoretical concepts; however, this may be accomplished through a broader conceptualization of transcendent capital. Introducing this concept may challenge leadership scholars to analyze whether there are uniquely spiritual resources that can be deployed to promote individual and organization health and fitness. What is the RIO of transcendent capital and how can it be measured? How do investments in transcendent capital affect leadership styles? What are the

effects of transcendent capital on economic development? What role do cognitive, affective, and motivational factors play in the development of transcendent capital? To examine these issues from the perspective of different spiritual cultures as well as different disciplinary orientations promises a fertile ground for future research. In the light of the ubiquitousness of the spiritual revival, and the varieties of transcendent capital they potentially create, investigations into the role of spiritual and transcendent capital in leadership, global economics, politics and social life represent a new and important area of scientific inquiry.

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Insert Figure 3 Here

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### **Recommendations for Future Research**

This research contributes to the extant literature in several ways. The model introduces a number of new constructs, among them transcendent identity, organizational climates for transcendent development and opportunity structures for the development of such climates and transcendent capital. It also contributes to existing spiritual leadership theory by placing greater elements on spiritual, as opposed to leadership aspects and addresses the criticism raised by Benefield (2005). The author asserts that the spiritual leadership theories developed by Fairholm (1991, 1998, 2001) and Fry (2003, 2005) indicate a strong foundation for the “leadership” aspects of spiritual leadership but the “spiritual” elements of these theories wobble on shaky foundations. The author calls for a more robust and sophisticated understanding of the spiritual aspects of spiritual leadership. The theoretical framework presented here accomplishes this goal by including more spiritually focused constructs such as transcendent identity, spiritually and religiously anchored organizations, opportunity structures for spiritual development and the growth of transcendent capital.

These constructs need to be more fully developed using applied theory building procedures (e.g., Dubin, 1976; Eisenhardt, 1989). For example, researchers may begin specifying the nomological net of concepts within which transcendent capital may be located. The existing literature on spiritual and religious development and the various types of capital including

human, social, and spiritual capital represent a point of departure. Once the constructs are more precisely defined, their level of analysis must be specified. Level-of-analysis issues are particularly relevant here since research investigating leadership and spirituality needs to employ level-appropriate measures and data-analytic techniques such as hierarchical or random coefficient modeling or within-and-between entities analysis (WABA) to determine the validity of scales to be developed. Empirical testing to determine discriminant validity of model parameters is necessary to establish whether a construct such as transcendent capital is redundant with other similar constructs such as spiritual capital.

In addition, qualitative methods such as case studies (Eisenhardt, 1989), narratives (Sparrowe, 2005) and or life story approaches (Shamir & Eilam, 2005) using textual analysis of materials chronicling the transcendent journeys of spiritual leaders and grounded theory methodology (Glaser & Strauss, 1967; Locke, 2001) can be employed to map the dimensions of transcendent capital. Likewise, ethnographic research can provide rich qualitative data and key theoretical insights to processes that are often not amenable to study through standardized surveys and quantitative research. At the same time, experimental and quasi-experimental designs as well as a full range of other innovative methodologies (e.g. multilevel modeling, accelerated longitudinal, etc.) to studying transcendent capital are also strongly encouraged.

The challenge then is to combine methodological rigor with a sophisticated understanding of leadership and spirituality in the context of the models presented in Figures 2 and 3 to create a vibrant, interdisciplinary and productive new field of inquiry. Genuine progress requires more than powerful models and equations that produce statistically significant results yet reduce leadership and spirituality to vague categories unrecognizable to those who practice in these fields or are incapable of distinguishing between the contributions of a Mother Theresa and a Jim Jones. Leadership and spirituality are rich, varied and highly complicated sources of action and motivation. The long-term aim of this research is not only to support empirically rigorous research but also to stimulate the formation of an innovative and productive stream of studies that will build bridges across economics, psychology, sociology, leadership studies and other social sciences and incorporates the humanities the humanities as well.

## **Conclusions**

This paper delivers, through a series of increasingly complex models, a theoretical framework aimed at the integration of leadership and spirituality. At the core of a spiritually anchored workplace are values coalescing from first order to higher order values and leaders' identity formations that result from the integration of these two strands of leader development. The integration of these two strands, as the proposed model of a spiritually anchored workplace suggests, leads to opportunity structures which arise from or promote a variety of leadership style that facilitate the development of an organizational climate for transcendent development. In this type of organizational climate, leaders and follows are encouraged to pursue the acquisition and accumulation of transcendent capital. Transcendent capital, as conceptualized here, allows leaders and followers to sustain their values and identities in the face of organizational pressures that can derail expressions and practice of spirituality at the workplace, create cognitive dissonance and lead to spiritual disintegration. Although spirituality and organizational leadership are intimately connected in the human experience, the warp and weft threads that potentially weave these strands into a tapestry are poorly understood.

Table 1

*Some definitions of spirituality*

Author(s)	Definitional Elements
Pargament (1997)	Spirituality as search for the sacred
	Emic (situation specific based on personal experiences), etic (shared by most people), transemic (combines emic and etic)
Emmons (1999); Mitroff & Denton (1999); Helminiak (1986); Parks (2000)	Spirituality as search for the sacred; spirituality as meaning making, search for unity connectedness to nature, humanity;
LaPierre (1999)	Spirituality as search for meaning in life; spirituality as encounter with transcendence; spirituality as sense of community; spirituality as respect for mystery of creation; spirituality as personal transformation
Howard (2002)	Spirituality as hidden yearning
Tisdell (2003)	Spirituality as honoring wholeness and interconnectedness; spirituality as meaning-making; spirituality as development toward greater authenticity; spirituality as knowledge construction through unconscious and symbolic processes
Estanek (2006)	Spirituality as spiritual development; spirituality as critique; spirituality as container for individual meaning; spirituality as common ground; spirituality as quasi-religion

Table 2

*Leadership theories imbued with spiritual constructs*

Leadership Theory	Spiritual Constructs
<b>Spiritual leadership</b> Fairholm (1998, 2001); Fry (2003, 2005)	Transcendence, altruistic love, hope, trust
<b>Authentic leadership</b> (Avolio & Gardner (2005); Ilies, Morgeson Nahrgang (2005); Klenke, 2005)	Knowing oneself, self-transcendence, self-sacrifice, moral courage
<b>Servant leadership</b> Greenleaf (1977); Patterson (2003); Winston, (2003)	Humility, altruism, service, trust, agapao love, hope
<b>Transcendental leadership</b> Cardona (2000)	Transcendence

Figure 1

*Values at the interface of leadership and spirituality*



Figure 2

*The infrastructure of leadership and spirituality based on value coalescence, identity Systems and identity transformations*

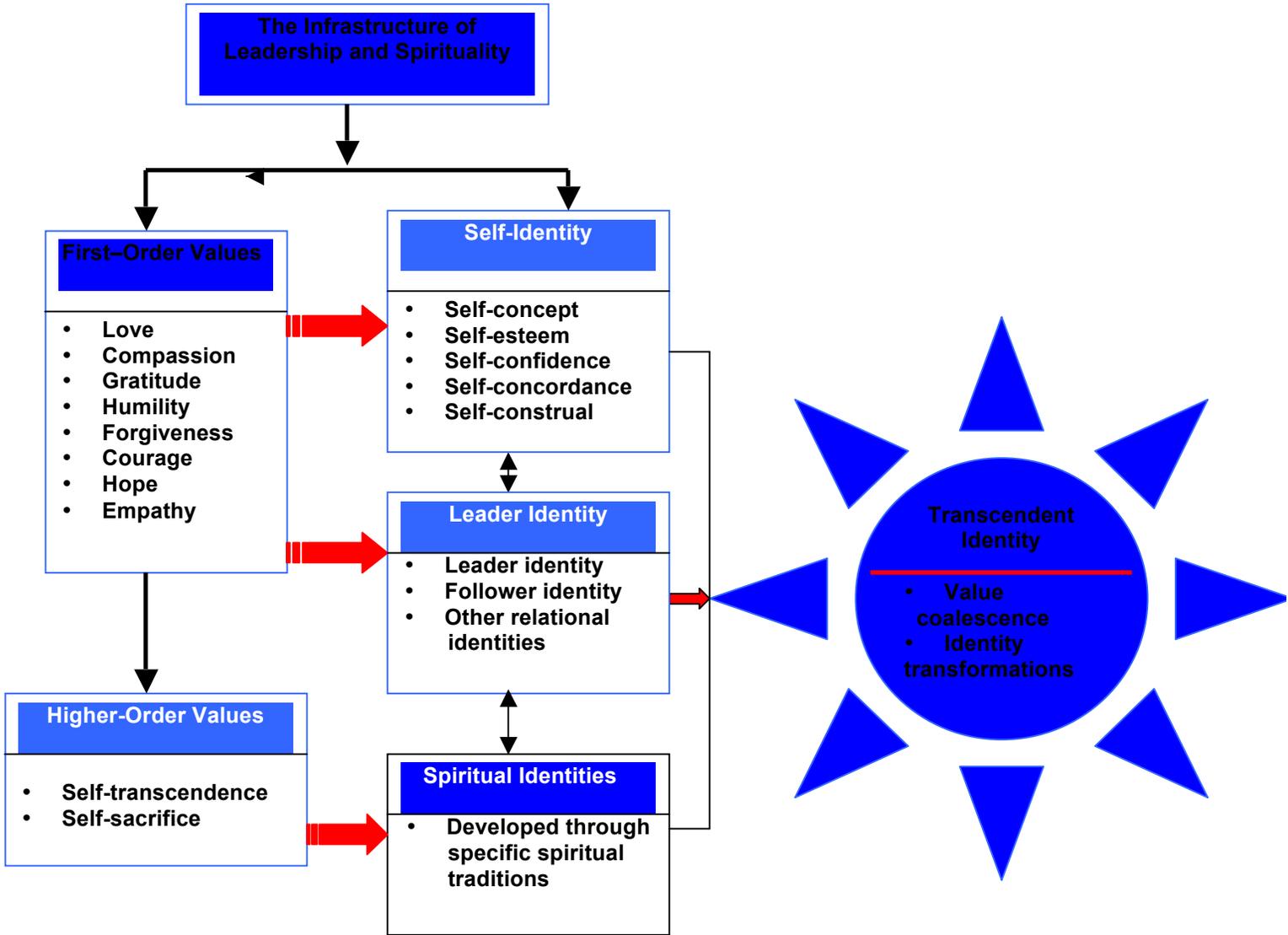
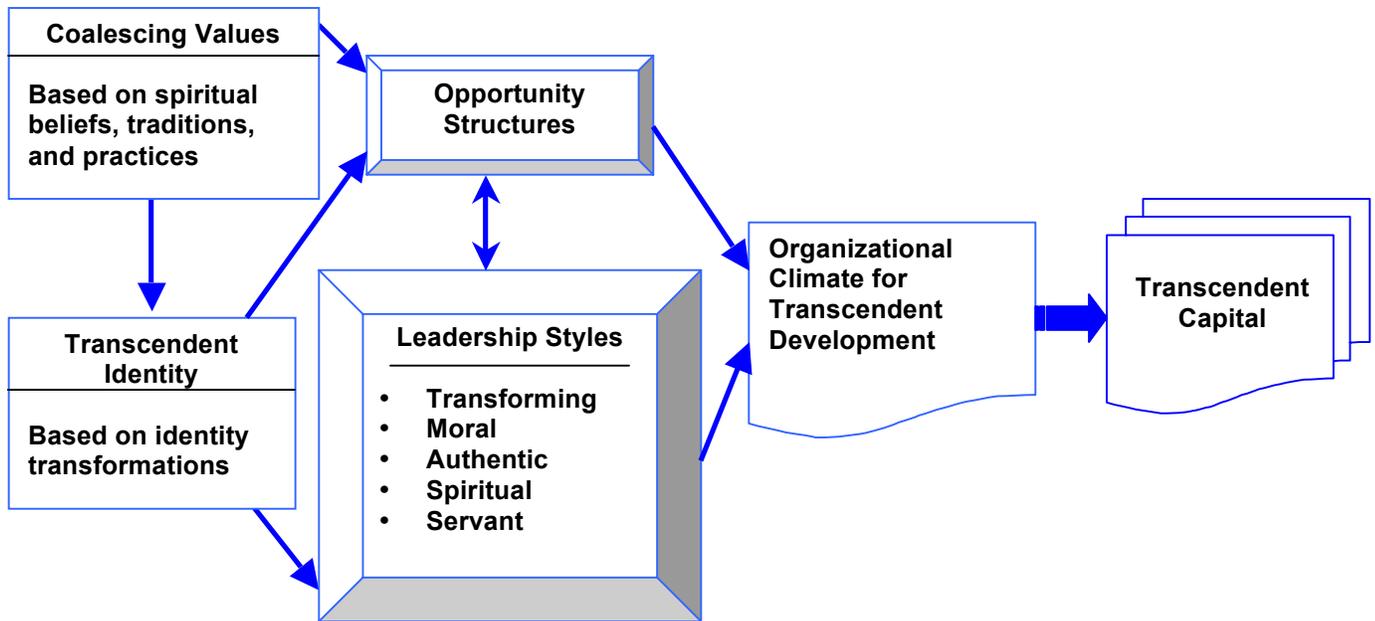


Figure 3

*Toward a model of spiritually anchored organizations*



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