

Legacy Leadership Institutes: Strengthening Leadership for Community Involvement in 50+ Adults

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Abstract

Baby-boomers, the sizeable group of knowledgeable, competent, and motivated adults born between 1946 and 1964, view the increased flexibility in lifestyle of their later years as an opportunity to make a further contribution to society (Wilson & Simson, 2006). How can this potential be realized? Legacy Leadership Institutes, created by the University of Maryland's Center on Aging, are designed in collaboration with community agencies through a process of needs assessment and volunteer position development. They provide intense classroom instruction in specific role competencies and non-positional leadership development, followed by supervised field placements in those agencies. The outcome is higher volunteer competence and leadership role self-efficacy, increased civic engagement, challenging volunteer roles, and ultimate enhancement of community social capital.

Background and Intended Audience

Imagine if, in Western society, retirement meant giving back to communities, translating skills acquired from life and work to new forms of civic involvement, meeting social needs, empowering individuals, and enhancing communities! That

is what baby-boomers desire – lifelong learning and “good work,” contributing to society in paid and/or unpaid ways (Wilson & Simson, 2003). Communities and individuals stand to gain much from this scenario, but obstacles in their way include narrow societal views of volunteers and of older adults, scant organizational infrastructure to support expanded volunteer roles, and few bridging programs or processes to enhance retirees’ transition to this next phase.

How can volunteer leadership programs help bridge the gap, equipping and mobilizing this pool of talented, motivated baby-boomers to address society’s needs and challenges? Although today’s retirees are likely to be knowledgeable, educated, and skilled, their leadership skills and leadership self-efficacy may be tied to their previous work roles, making it difficult for them to see how to transfer their acquired knowledge and skills to volunteer roles. One creative avenue is collaboration between a university and community agencies to offer volunteer leadership programs giving retirement-aged adults critical new volunteer role competencies while building their non-positional leadership skills and leadership self-efficacy.

Theoretical Base

The Center on Aging at the University of Maryland has integrated relevant leadership models, including implicit leadership theory, transformational leadership, situational leadership, and leadership self-efficacy, as well as lifelong learning and civic engagement perspectives to offer such a volunteer leadership program for the past eight years.

Implicit Leadership Theories

Implicit leadership theories are culturally shared assumptions about leadership, developed through one’s previous interpersonal experiences and knowledge of leaders (Epitropaki & Martin, 2004). Based on these “typical” characteristics and other leadership beliefs, people evaluate themselves and others as leaders (Lord & Maher, 1993). Several commonly-held assumptions about leadership can inhibit individuals from identifying and exercising their leadership capability, especially in later adulthood and as volunteers. For instance, nature-nurture leadership beliefs, the confounding of leadership with position or charisma, attributions about previous success or failure in leadership situations, and beliefs about whether leadership ability is static or can be strengthened are likely to affect leadership initiative and leadership self-efficacy in baby-boomers (e.g., Dweck, 2006). A critical factor for non-positional leadership development is to surface and challenge participants’ non-constructive assumptions about leadership.

Transformational and Situational Leadership

Leadership, the ability to work effectively with a group towards a goal, encompasses both basic and more advanced skills. Task leadership and

relationship-oriented leadership can be viewed as basic group leadership skills. Task leadership, which fosters group progress towards the goal, includes training new group members, helping to develop group goals, organizing tasks, coordinating work load, monitoring work quality, giving performance feedback, and delegating decisions. Relationship leadership skills, which facilitate group cooperation, include fostering positive norms, mentoring and developing group members, preventing and resolving group conflicts, or encouraging/emotionally supporting group members. (Yukl, 1994)

Situational leadership research has demonstrated that effective leaders have both sets of skills, utilizing them based on group needs (Hersey & Blanchard, 1996). In Legacy Leadership Institutes, situational leadership helps participants to reframe leadership as ordinary actions that benefit groups, identify their typical group leadership styles, recognize situational influences on leadership effectiveness, appreciate the need for leadership style adaptability, and explore stages of group development.

Beyond basic leadership skills, effective group leadership requires the ability to envision a better solution/organization, to motivate others to high achievement, and to utilize powerful strategies to reach ambitious goals (Johnson & Johnson, 1994; Kirlin, 2003). These skills characterize transformational leaders who bring out the best in others, nurturing personal and group improvement, sharing inspiring visions of the future, and fostering commitment and motivation towards important goals (Bass, 1985; Kouzes & Posner, 2002). Transformational leadership skills are relevant at every level of highly effective organizations, including volunteers (Raelin, 2003). For instance, volunteers who demonstrate transformational leadership increase organizational commitment and involvement in other volunteers (Catano, Pond, & Kelloway, 2001).

One well-researched transformational leadership model describes five core leadership practices: modeling the way, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart (Kouzes & Posner, 2002). In the Legacy Leadership Institute curriculum, we develop participants' transformational leadership through leadership assessment with strengths-based feedback and through application to their new volunteer roles in nonprofit or community organizations.

Leadership Self-Efficacy

Leadership self-efficacy, confidence in one's ability to work effectively with a group to reach a goal (McCormick, 2001), complements transformational leadership development in the volunteer leadership program. People with higher leadership self-efficacy challenge and motivate themselves and others, persist towards goals in the face of obstacles, build group confidence, and achieve group goals (Chemers, 1996; Kane, Zaccaro, Tremble, & Masuda, 2002). They are also more willing to take initiative or assume leadership responsibilities, even when

volunteers (e.g., Chan & Drasgow, 2001; Depp, 1993) and those with greater self-efficacy for the group's task are more willing to volunteer to be group leaders (Dickerson & Taylor, 2000). Leadership self-efficacy seems to influence leadership behavior and group accomplishment more than leadership knowledge and skills or group factors alone.

The most effective ways to increase self-efficacy are mastery experiences, modeling, social persuasion, and physiological feedback (Wood & Bandura, 1989). Mastery describes improvement through practicing the specific skill, while modeling is learning by observing others use the skill. More cognitive approaches include social persuasion, i.e., getting constructive feedback after using the skill, and physiological state, i.e., changing one's belief that task anxiety indicates task incompetence (Wood & Bandura, 1989). Instructional programs and other developmental or life experiences which include these aspects, such as the Legacy Leadership Institutes, raise volunteers' task-specific and leadership self-efficacy (Schauber & Kirk, 2001; Ohnoutka, Waybright, Nichols, & Nestor, 2005).

Bandura's (1977) strategies for increasing self-efficacy are utilized throughout Legacy Leadership Institutes. Participants are helped to strengthen their leadership self-efficacy by gaining awareness of and practicing their leadership strengths in the classroom, field placement organization, and community. They also gain task-specific self-efficacy from new volunteer role competence and organizational knowledge (Gist & Mitchell, 1992).

Institute Goals and Learning Objectives

Legacy Leadership Institute Goals

Legacy Leadership Institutes build volunteers' institute-specific skills, transformational leadership competencies, leadership self-efficacy, nonprofit organizational familiarity, and knowledge of relevant social issues through both the classroom and the field placement phases (Wilson & Simson, 2003). The classroom phase lasts between six to eight weeks, typically meeting once or twice weekly for an average of 10-12 hours a week, while the field placement ranges from three to six months for several days a week.

Field placement sites are developed jointly with nonprofit organizations to give participants substantive new volunteer roles along a framework for constructive feedback from supervisors and peers. Before an institute, agency personnel plan the curriculum with Center on Aging staff, gaining insight into the program while designing a new volunteer role to augment their organization's capacity. At this writing, there are nine versions of Legacy Leadership Institutes across the United States and eight in Europe, preparing older adults for specific, substantive volunteer roles. The United States versions include:

- Legacy Leadership Institute on Public Policy (as legislative aides in state legislature).

- Legacy Leadership Institute on Development and Fundraising for Non-Profits.
- Legacy Leadership Institute on Humor Practices for Healthy Eating (fostering youths' health).
- Legacy Leadership Institute on Disaster Response (disaster response team development and leadership).
- Legacy Leadership Institute on Volunteer Management.
- Legacy Leadership Institute on the Environment (environmental conservation and education).
- Legacy Leadership Institute on Community Development and Governance.
- Legacy Leadership Institute on Nonprofit Organizational Assessment (needs assessment for community organizations).
- Legacy Leadership Institute on Pro Bono Service (volunteer consultation to nonprofits).

Often professional staff of the field placement organization attends the institute along with Legacy Leaders, to increase their familiarity with the Legacy Leaders' training and competencies while facilitating staff-volunteer teamwork. Two Legacy Leadership Institutes are multi-generational, while the others generally only enroll those people aged 50 and older.

Learning Objectives

Legacy Leaders can expect to:

- Acquire institute-specific knowledge and skills (e.g. fundamentals of nonprofit fundraising, nutrition and humor practices, environmental education/stewardship, state legislative processes).
- Gain an overall understanding of the policy issues, organizational and social context influencing the agencies in which they will work.
- Observe and learn from subject experts, leadership experts, and other participants about institute-relevant social issues, leadership ethics and values, and community concerns.
- Challenge self-limiting elements of implicit leadership theory and increase openness to self-leadership learning.
- Identify task-relationship and transformational leadership strengths through assessment and positive feedback from peers and faculty with strengths-based leadership training.
- Further develop and increase their comfort in using non-positional leadership skills and institute-specific competencies through supervision and mentoring in field placement.

Resources and Materials Needed for Leadership Program

Resources Needed

To conduct a Legacy Leadership Institute requires effective collaboration between program coordinators and nonprofit or community agency/agencies, curricular and leadership training specialists, relevant assessment tools, along with a non-positional leadership and institute-specific curriculum. These are described in more detail below.

1. Non-profit or community organizations work collaboratively with Legacy Leadership staff to identify critical unfilled organizational needs and to create a substantive volunteer job description to address one of those needs. They also describe the key competencies of that volunteer role, co-design an institute curriculum to teach those competencies, recommend potential presenters for institute-specific knowledge and skills, and recruit and designate one or more of their professional staff to be involved in the institute and to supervise the field placement phase.
2. Institute faculty use adult learning pedagogies appropriate for a group diverse in previous leadership experience, leadership/management training, age, ethnicity, and education.
 - Leadership trainers help Legacy Leaders challenge self-limiting leadership assumptions, identify situational and transformational leadership strengths, use a strengths-based perspective to develop non-positional leadership skills and self-efficacy, and work collaboratively in teams.
 - Institute-specific faculty teach the knowledge and skills needed to equip volunteers for success in the newly created non-positional leadership role (see sample curriculum below).
3. Leadership instruments mirror curricular goals (i.e., strengthening non-positional transformational leadership, increasing leadership self-efficacy) and are administered as baseline and post-program assessments.
 - Transformational leadership is assessed by the Leadership Practices Inventory (Kouzes & Posner, 1988), a 30-item leadership inventory assessing five transformational leadership factors: Challenging the Process, Inspiring a Shared Vision, Enabling Others to Act, Modeling the Way, and Encouraging the Heart. Scale reliabilities range from .79 to .88.
 - The leadership self-efficacy measure, developed following Bandura's (1997) guidelines, includes 20 Likert-scale items, 10 on group leadership self-efficacy (alpha reliability of .88) and 10 on field placement self-efficacy (alpha reliability of .92). A sample item is "Helping a group work through conflicts or problems" and response choices tap confidence in successful achievement in each situation.

Model for Institute Curriculum

The 60 to 80 hour classroom phase of the Legacy Leadership Institute curriculum integrates core elements common to all institutes with institute-specific topics. The core curriculum topics are perspectives on volunteering, situational and transformational leadership competence, nonprofit/community organization functioning, organizational communication skills, and community collaboration/teamwork skills. Institute-specific knowledge and skills covered include social issues and organizational contexts which participants will face in the field placement, and the knowledge and skills needed to succeed as volunteer leaders in their new role. For instance, environmental institutes build Legacy Leaders' ability to conduct environmental conservation and education activities, along with the core curriculum. Following the classroom phase, all leaders engage in 200 to 450 hours of supervised field placement specific to their institute.

Results

Participants

Of 94 graduates for whom we have pre-program and post-program leadership data, about two-thirds are women and one-third men. They range from 49 to 77 years old, averaging 62.8 years. Three-quarters are European-American, 15% African-American, with smaller representation from other ethnic groups. They are relatively highly educated, with half having at least some college, and another third having graduate degrees. They are equally divided between those who have held management positions and those who held professional, technical, or clerical roles. Most are retired, though a significant minority is employed part-time.

Impact of Legacy Leadership Institutes on Leadership

Leadership self-efficacy: Legacy Leadership Institute participants made significant gains in group leadership self-efficacy after the classroom phase and before beginning their field placements. As would be hoped, they also gained confidence in accomplishing their field placement responsibilities (field placement self-efficacy) (see Table 1).

Table 1. Paired samples t-test results (pre-Institute and post-classroom phase) on self-efficacy

Scale and Survey Questions	n	Pre-Mean	Post-Mean
Group Leadership Self-Efficacy Scale (10 items, alpha = .89)	85	3.74	4.02*
Getting a group to work together productively	90	3.87	4.04**
Motivating people with different interests towards	90	3.61	3.89**

a common goal			
Helping a group work through conflicts/ problems	90	3.62	3.96*
Communicating about an exciting future that the group could (should) be working towards.	90	3.84	4.10*
Delegating responsibilities to others in the group	90	4.00	4.19*
Building informal alliances or relationships to get things accomplished	85	3.84	4.19**
Taking on leadership responsibilities that are unfamiliar to you	84	3.55	3.96**
Identifying untapped potential or ability in others	85	3.55	3.88**
Giving constructive feedback about performance or attitude problems to another	85	3.60	3.80
Identifying creative strategies to help a group reach its goals	85	3.82	4.06*
Field Placement Self-Efficacy Scale (10 items, alpha = .921)	85	4.13	4.24
Accomplishing the tasks I'm asked to do in my field placement	85	4.13	4.41**

* p < .05. ** p < .01.

Scale = 1 (Not competent or comfortable) to 5 (Very competent and comfortable).

Self-efficacy increased significantly across institutes after the Legacy Leadership Institute classroom phase, with no significant differences in leadership gains between managers and non-managers.

Table 2. Paired samples t-test results (pre-Institute and post-classroom phase) on transformational leadership

Scale Item	n	Pre-Mean	Post-Mean
Mean Overall Leadership Practices Inventory	94	46.32	48.93**
Challenging the Process (6 items, alpha = .883)	94	44.85	47.43**
Inspiring a Shared Vision (6 items, alpha = .880)	94	42.50	45.32**
Enabling Others to Act (6 items, alpha = .816)	94	50.10	52.10**
Modeling the Way (6 items, alpha = .779)	94	47.46	49.93**
Encouraging the Heart (6 items, alpha = .905)	94	46.69	49.90

* p < .05. ** p < .01.

Transformational leadership: After completing the field placement, Legacy Leaders reported significant increases in all five transformational leadership practices (see Table 2). Gains in transformational leadership are seen across institutes, with no significant differences between institutes.

Those without previous management experience report significantly greater increases in transformational leadership than those with prior management experience. Controlling for pre-institute self-rated transformational leadership, non-managers increased significantly more than managers in Challenging the Process, Enabling Others to Act, Modeling the Way, Encouraging the Heart, and overall LPI self-rating (see Table 3).

Table 3. ANOVA comparisons between managers and non-managers on transformational leadership difference scores – pre- and post-Legacy Leadership Institutes

Scale Difference Scores	Managers Mean (SD)	Non-Managers Mean (SD)	Mean Squares	F ratio
Mean Overall LPI	53 (5.51)	5.31 (4.89)	134.769	5.123**
Challenging the Process	27 (6.06)	4.93 (6.46)	116.067	2.894*
Inspiring a Shared Vision	.50 (8.73)	4.30 (7.60)	119.661	1.818
Enabling Others to Act	.73 (4.86)	5.17 (4.74)	101.113	4.331**
Modeling the Way	.23 (5.57)	5.63 (5.40)	153.799	5.105**
Encouraging the Heart	.92 (6.63)	6.50 (5.75)	226.248	6.493**

* $p < .05$. ** $p < .01$.

Though men and women did not differ in pre-institute leadership, gender had a slight influence on self-rated leadership increases; women reported significantly greater gains than men only in Encouraging the Heart. There were no other demographic influences on leadership ratings gains.

Follow-up research, both quantitative and qualitative, indicates that program gains continue to influence participants over the longer term. In survey research, institute graduates reported significant increases in community attachment from baseline to two year follow-up. Over 50% had taken employment, usually part-time, with the vast majority attributing that to knowledge, confidence, and connections gained through Legacy Leadership Institute participation. In structured interview research, the earliest institute's graduates reported significantly increased community leadership activities with or without benefit of a formal leadership role (e.g., initiating a community emergency preparedness program, creating a neighborhood garden, soliciting corporate donations for nonprofit organizations, running for local office, organizing a nonprofit to lobby the state legislature).

Conclusions

Legacy Leadership Institutes assist adults over 50 years of age to recognize and strengthen their leadership competencies for non-positional leadership, while

equipping them with additional skills and knowledge for new volunteer roles. Outcomes research demonstrates that older adults strengthen transformational leadership and leadership self-efficacy after participation in the two-phase volunteer leadership development program that includes classroom learning and an intensive, supervised field placement. Transformational leadership is greatly strengthened by completion of any Legacy Leadership Institute, especially for those without prior management experience, while both previous managers and non-managers gain in non-positional leadership self-efficacy. These gains are beneficial to non-profit organizations, through capacity building enabled by the commitment of competent volunteers, and to the volunteers, through enjoyable and productive engagement. Leadership development programs for baby-boomer volunteers can enhance the social capital of communities.

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Biography

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Karen Harlow-Rosentraub, Ph.D., associate professor of nursing at the Frances Payne Bolton School of Nursing, Case Western Reserve University, is the external evaluator for the Legacy Leadership Institutes and Legacy Corps programs of the University of Maryland. She also directs a global initiative doing comparative research on older adult volunteerism.