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A FRAMEWORK FOR VIRTUAL LEADERSHIP DEVELOPMENT TRAINING IN THE INTELLIGENCE COMMUNITY

By

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A DISSERTATION

Submitted to the faculty of the Graduate School of the Creighton University in Partial Fulfillment of the Requirements for the degree of Doctor of Education in the Department of Interdisciplinary Leadership

Omaha, NE
April 10, 2015
Abstract

The purpose of this paper is to develop a set of elements that Intelligence Community (IC) leadership can use as a framework for creating or soliciting contract proposals to transition leadership development courses from the current face-to-face format to the virtual environment.

Face-to-face leadership development courses provided by IC agencies to employees are costly, and therefore limit the number of employees who can participate in the training. IC employees face unique leadership challenges, and broader application of leadership development is needed. Due to the unique ethical and leadership dilemmas faced by the IC workforce, the unique makeup of the current workforce (including the learning styles and values of that workforce), the limitations of traditional face-to-face leadership development efforts, and the broad group of stakeholders affected, the IC should transition from face-to-face leadership development to a virtual environment.

The researcher conducted a phenomenological qualitative analysis through open-ended interviews with scholars and practitioners, as well as employees of the IC. The researcher’s methodology plan included coding common themes from in-person and telephone interviews. The respondents verified the quality validity of the study.

Through the interviews conducted, eight primary themes emerged as important to include in a virtual leadership development course. These eight themes include self-understanding, action learning, interaction, context, knowledge evaluations, follow up, mentorships, and self-advancement.

These eight elements should be the foundation for a statement of objectives within a request for proposal that a government entity might use in soliciting services for a virtual
leadership development course. There are certain obstacles that this change may present including resistance to change based on potential perceived loss of funding or prestige.
Dedication

For from Him, through Him, and to Him are all things. Soli Deo Gloria!
Acknowledgements

I would like to express my deepest appreciation to my committee chair, Dr. Donna Ehrlich, for her guidance, patience, and voice of wisdom. I would also like to thank my committee member, Dr. Jim Martin for his creativity, attention to detail, and diligent work ethic throughout this journey.

Thank you to Dr. Nance Lucas, who many years ago introduced me to the scholarly exploration of leadership and provided a living example of a thoughtful strengths-based leader. To Ms. Joan Barry, for her understanding, support, and encouragement that gave me the opportunity to wholeheartedly embark on this endeavor.

To Norah, thank you for your radiance, beauty, and playful spirit that offered a welcomed distraction in the busiest of times. To my parents and first teachers, Mark and Janet Jenkins, thank you for your love, and for teaching me the value of writing well. To Kelly, thank you for your perseverance, inspiration, and love. Without you, not a page of this research would exist.
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CHAPTER ONE: INTRODUCTION

Background of the Problem

Intelligence professionals routinely face unique and difficult ethical dilemmas (Godfrey & Jacobs, 1978; Allen, 2008; Goldman, 2006). Often concealed from public scrutiny and debate, leaders of the Intelligence Community (IC) must make decisions and gather information in a way that assists the government in protecting the homeland, while also protecting the rights and liberties of individuals (Perry, 1995). The IC has been the subject of much criticism over how it conducts its operations. For example, there has been much debate over the ethical considerations of the Central Intelligence Agency’s enhanced interrogation techniques, as well as the mass electronic surveillance efforts by the National Security Agency conducted under the code name PRISM (Shane, Johnston, & Risen, 2007). Although intelligence forces have become an integral part of modern government (Herman, 1999), decision makers within those organizations are faced with vague statutory authorities that could be perceived by the public as overreaching (Clark, 2010).

Traditional leadership development methods have largely targeted those already in leadership positions, while future managers in the IC will likely emerge from the lower ranks of its organizations. Because of this, leadership development that is aimed toward the needs of all generations is needed. The effectiveness of leadership development efforts in the IC impacts policy makers, employees, managers, and other public officials. Therefore, leadership development resources must be available to those within the IC at all levels of command and responsibility.
Purpose of the Study

Face-to-face leadership development courses provided by IC agencies to employees is costly, and therefore limits the number of employees who can participate in the training. IC employees are faced with unique leadership challenges, and broader administration of leadership development is needed. Unprecedented budget cuts, broad technological advances, and a workforce that spans five generations within the IC have created an environment where the traditional methods of leadership development training need to change (Clapper, 2013). This research will focus on shifting leadership development training to a new format. This will allow broader administration of current training curriculum, while also using existing IT infrastructure to reduce cost. Previous research indicates that training topics typically reserved for face-to-face environments are suitable for a virtual setting (Liebowitz, 2003; Painter-Morland, Fontrodona, Hoffman, & Rowe, 2003; Bos & Shami, 2006). The purpose of this paper is to develop a set of elements that IC leadership can use as a framework for creating or soliciting contract proposals to transition current curriculum from face-to-face to the virtual environment.

Research Question

What elements should be included in a Request for Proposal (RFP) for a virtual leadership development course for IC employees?

Definition of Terms

The following terms were used operationally within this study, and the definitions given are based on the context of this research paper.

Leadership development skills: Individual strengths such as influencing, relationship building, strategic thinking, and executing (Rath & Conchie, 2008).
**Intelligence Community**: An association of 17 distinct United States government agencies that work independently and collectively to conduct intelligence activities on behalf of the government.

**Virtual training**: Web-based training administered through the World Wide Web or other connected digital computer network.

**Senior Executive Service**: Managerial, supervisory, and policy positions classified above General Schedule grade 15 or equivalent positions in the Executive Branch of the Federal Government (Overview & History, 2015).

**Request for Proposal**: A Request For Proposal (RFP) is a public call issued by a government entity for vendors to submit a written offer to supply services.

**Limitations of the Study**

Access to employees and managers within the IC presents a significant limitation. Research that is intended to determine how best to implement a virtual leadership development program within the IC would greatly benefit from surveys, case studies, test courses, and other sampling gathered from the workforce. The bureaucratic processes required to gather and disseminate information from within the IC workforce make such an effort time-prohibitive. Academic institutions and researchers that are not limited by the issue of access, such as those at the National Defense University and other academic institutions that have the opportunity to operate in a classified environment have a very unique opportunity to conduct more extensive research on the impact a virtual leadership development course would have on the IC workforce. An additional limitation of this research is the author’s own bias. As a member of the population that this proposal is
intended to impact, the author has both positive and negative biases concerning attitudes toward leadership development within IC organizations.

Significance of the Study

Traditional leadership development methods have largely been intended for those already in leadership positions, while future managers in the IC will likely emerge from the lower ranks of its organizations. The stakeholders associated with our problem include policymakers, employees, and managers within the organizations. The recent example of the PRISM program, an effort by the National Security Agency to track and log metadata from phone calls made by United States (U.S.) citizens, gives us insight into the broad spectrum of stakeholders that are affected by policies and decisions made within the IC (Ball & Rusche, 2013). These stakeholders also include Congress, the President and his staff, members of the media, and businesses within private industry, and even the U.S.’s international partners.

Delivering a virtual product or service to tens of thousands of people is a daunting and intimidating task. In any operational environment there would be financial, technical, and policy constraints that would make such an endeavor seem overwhelming and, at times, impossible. Even more so, organizations that operate within the framework of the IC face difficulties in accessing leadership development resources on the open Internet, as many agencies operate on a classified network that cannot access external resources (Director of Central Intelligence, 2002). Little progress has been made in providing employees of these agencies with virtual leadership development resources. For several years, employees within the IC have indicated that they are satisfied with the trust and confidence of their senior management, but have also indicated that they wish to see
increased leadership in areas such as motivation and commitment (Office of the Director of National Intelligence, 2008). Employee insight into leadership and vision, as well as investigations conducted by the Inspector General of the Office of the Director of National Intelligence (ODNI), caused a renewed interest in examining leadership development within the IC agencies (Maguire, 2008). Surveys and reports indicated that leadership characteristics were low, there was no effort made to define adequate metrics (Office of the Director of National Intelligence, 2008).

The ethical dilemmas that intelligence officers face are unique and numerous. Intelligence officers have access to large amounts of sensitive information that the rest of society does not have access to, and to use that information to its maximum capability to protect the homeland and defend against those who wish to do it harm (Herman, 1999). Along with the difficulties of acting within the bounds of the law when operating in the intelligence environment, those within the IC also often face an enemy that uses corrupt or misguided intelligence (Herman, 1999). Additionally, IC employees are often faced with a unique dilemma of providing an accurate representation of the facts to their superiors and policymakers; all while using deceitful or uncomfortable tactics to extract truth from their adversaries (Godfrey, 1978; Herman, 1999). These challenges contribute significantly to the need to have strong leaders in the IC, and leadership training for their development.

While the Federal Government has used virtual courses to train their employees in job skills, the virtual environment has not often been used as a tool for leadership development ("National Security: An Overview of Professional Development Activities Intended to Improve Interagency Collaboration," 2010). There is an abundance of
existing research on the methods and frameworks for leadership development within the public sector, yet the mode has been largely ignored.

According to past assessments of the federal Senior Executive Service (SES) corps, IC Senior Executives are not prepared to lead within other organizations as needed. Future IC leaders may be hired from outside of government, but with the unfavorable rate of success for those hired from the private sector, most future IC leaders will have to be developed from within the workforce (Hatfield, 2008). This means that leadership development resources must be available to those within the IC at all levels of command and responsibility.

An additional factor that the IC has rarely faced since the terror attacks of September 11, 2001, is a major reduction in appropriations. For many years the U.S. Congress has been generous in the funds appropriated for defending U.S. land, life, and interests, but the spending cuts for fiscal year 2013 (commonly known as sequestration) have forced the IC and sub-agencies to tighten their belts and find ways to cut spending across the board (Moore, 2013). Not only has this created an ominous mission reality for the IC, but also it has created an environment of not doing more with less, but doing less because of fewer resources (Ignatius, 2013).

One of the challenges in providing tools and articles for all levels of the workforce – not only those in senior management positions – is that most currently administered leadership programs are intended for those in higher levels of management (Hatfield, 2008). Providing resources for all career stages creates a shared sense of leadership. The government and intelligence officials have recognized that if they are to effectively protect and defend the homeland, communication and information sharing are
critical to the effective execution of their mission (Monahan, 2011). Not only would relationships and information sharing improve with a greater emphasis on leadership development within the IC, but also intelligence gaps could be prevented by a culture where interaction between leaders and followers is transformed.

Unique leadership challenges point to a need for a more robust and broad leadership development effort in the IC. In 2006 the Director of National Intelligence released a strategic human capital plan that indicated that a majority of IC employees were not satisfied with leadership practices within their organization between the years 2001 and 2005 (Office of the Director of National Intelligence, 2006). While public officials have recognized this, little advancement has been made in correcting such a deficit. Budget limitations and mission needs have only further subdued any progress in furthering leadership development efforts, as the limited technical environment within the IC confines the opportunity for delivering relevant and on-demand leadership development resources to the workforce. With several generations working alongside each other in today’s workplace, traditional leadership training programs provided by the Federal Executive Institute are costly and time-consuming (Center for Leadership Development, n.d.). What is more, traditional leadership development methods have largely been targeted towards those already in leadership positions. With the future managers in the IC likely coming from the lower ranks of its organizations, leadership development that is intended for all generations is needed. To understand this problem, and identify actionable solutions, an understanding of those affected by the leadership development issues with the IC is needed. The workforce, policy makers, those in the
private sector, and the international community all have a stake in the decisions made by leaders within the IC.

**Integrated Technology for Integrated Leadership Development**

A significant opportunity for implementation of virtual leadership development is the IC’s effort in building a unified information technology infrastructure. In 2011 Director of National Intelligence James R. Clapper stood before Congress and agreed to find major cost savings in the IC's IT budget, and suggested that this might be done by streamlining the IT infrastructure of the 17 IC elements (Pellerin, 2013). In essence, his recommendation was to take the information-technology efforts that each agency is spending money on, such as basic office software, networks, and other common efforts within each individual agency's IT infrastructure, and create one comprehensive network instead of 17 little networks (Pellerin, 2013). This effort, which began operations in summer 2013, is intended to be fully operational across the Intelligence Community by 2016. This initiative will allow every user within the IC to log into one unified network no matter which IC office they may be at physically. They will have common applications, virtual resources, and a common IT help-desk. This initiative is known as the IC Information Technology Enterprise, or IC ITE (pronounced eye-site).

Historically, agencies in the federal government have provided leadership development opportunities independently. Much like the IT infrastructure, each agency has established their own process and delivery for leadership development. This unnecessary replication has proved costly. The IC should consider streamlining their leadership development efforts around the IC ITE network. Because all IC employees will be able to access this network, resources could be combined to offer robust
leadership development tools for all levels of the workforce in a virtual and on-demand environment.

**Stakeholders**

The leadership development deficit within the IC related to the intelligence shortfalls and employee feedback goes beyond just those within the IC workforce. Public organizations, such as the IC, are uniquely positioned as entities that are responsible to the taxpayer for providing a service for social or defense needs. These organizations are responsible to provide this in a way that is ethical and, especially in recent times of budgetary crisis, delivered in an efficient manner.

There are many consequences when an organization in the private sector fails to do its mission, and there is evidence that when leaders fail to act with integrity there are significant financial consequences; company shares may go down, people will lose money, jobs, and many families will have to face financial hardships (Leroy, Palanski, & Simons, 2012). On the other hand, organizations that work in the fields of defense and intelligence often face consequences that result in the loss of life when they fail to perform at their highest levels. Organizational failures in the IC have consequences that can be difficult to measure, as the cycle of gathering and using intelligence has many layers and dependencies reliant on each other (Lowenthal, 2000).

The stakeholders affected by the leadership decisions and actions made within the IC reach far beyond the government employees. For those in the IC, there are several layers of stakeholders, many of whom organizations in the IC are accountable (Randol, 2010). From taxpayers to lawmakers to the employees of the organization, the leadership decisions that employees and managers make have far-reaching consequences, and the
policies that create the leadership development environment will significantly affect these stakeholders.

While history will grant us better insight into the effects of leadership decisions within the PRISM program, the public outcry and significant media coverage demonstrate just how broad the impact leadership decisions within the IC are (Ball & Rusche, 2013). Policymakers, including the President, congress, and agency directors, are appointed on behalf of the people to make decisions that will assist in the assurance of their security and economic stability. To some, the positions of these policymakers are contingent upon how successful the public perceives that they have been in providing this service (Burden & Hillygus, 2009). These policymakers are not just those in elected office, such as the President or Congress, but the political appointees tasked with leading major IC organizations, such as the Director of National Intelligence, the Attorney General, and the directors of the seventeen IC agencies. These stakeholders that hold public office have not only committed to ensuring the safety and security of citizens, but they will also be tremendously affected by the decisions made by those under their command. Especially for those in high-profile positions that receive a great deal of media attention, their careers are also directly impacted by leadership decisions. The graph below (Figure 1) demonstrates these relationships along with their complexity.
The employees of the IC organizations are those who not only feel a sense of public calling to serve their country, but they are also accountable to the policymakers and citizens. They are also considered stakeholders in that they have a vested interest in their careers and the leadership opportunities offered by their employers. Managers, while still considered employees of the IC organizations, have a particular responsibility to provide ethical leadership based on the position of trust that's been placed in them by policymakers and the by U.S. citizens. Concerning employees as stakeholders, leadership development is often touted as a means to empower employees. There is research that suggests employees respond positively to empowerment, and in particular feel greater sense of motivation (Bartol & Locke, 2006).

Leadership decisions in the IC have a direct impact on the relationships the U.S. has with critical foreign partners (Walsh, 2007). In 2013, news broke that the NSA had been intercepting data from Germany’s Chancellor Angela Merkel (Parmar, Miller, and
Ledwidge, 2014). The aftermath of this international-relations scandal culminated in Merkel stating that trust between the two nations must be rebuilt (Parmar et al., 2014). What is more, the Wall Street Journal reported that the U.S. was conducting surveillance on some thirty-five world leaders (Gorman & Entous, 2013).

Each of these entities are considered stakeholders based on a set of often mutual impacting factors that will be discussed in the following pages of this paper, and each results from the consequences of an IC organization's action or inaction as it relates to leadership development, and the policies that govern that leadership development process. These factors include morale, productivity, cost savings, and national security (Weakliem & Finkel, 2006; Pellerin, 2013). While these four factors are not exhaustive, they represent a substantial group of linked consequences that may occur in the field of intelligence and national security (see figure 1 below) without the proper leadership development policy.

**Figure 2.** Linked consequences of leadership development within the Intelligence Community.
While there may be an initial reaction that leadership development will represent a significant amount of cost for government organizations, we see that there is a tremendous cost associated with ethical failures in both the private and public sector. While many of the major business failures in the early 2000s that were a springboard for the United States' current financial woes seemed to involve basic business errors, the roots of many of these cases involved substantial and well documented failures of the ethics, including Enron and WorldCom ("The Good, the Bad, and Their Corporate Codes of Ethics: Enron, Sarbanes-Oxley, and the Problems with Legislating Good Behavior," 2003). There are various levels of costs associated with unethical behavior that stems from a lack of leadership; some of these consequences include administrative and audit costs, legal and investigative costs, medial education, and employee turnover (Thomas, Schermerhorn, Dienhart, & Bartles, 2004).

There is also a sense of public appearance that plays a role in the cost factors of unethical behaviors. As IC agencies work with foreign partners to leverage common resources, there may often be a sense of political pressures that other nations feel when they align with organizations with poor reputations. As one scholar put it, “… the value of ethical behavior resides in the fact that it signals to others that we are trustworthy, and, hence, a good partner to do business with.” (Schwab, 1996, p. 499). This issue of public appearance will also play a significant role in how citizens perceive the level at which their civil liberties are being protected and respected. The leadership and ethical decisions, which lead to cost issues, can have a direct effect on national security. These costs include acquisition reductions that involve the development and procurement of weapon systems, lower development capabilities for the US defense industry, and a large
reduction in force of the military, intelligence, and defense organizations (Bosserman, 2011).

The purpose of this paper is to develop a set of elements that IC leadership can use as a framework for soliciting contract proposals to transition current curriculum from face-to-face to the virtual environment. This paper will discuss existing scholarship and research that informs how a virtual leadership development course in the IC could be successful.
CHAPTER TWO: LITERATURE OVERVIEW

This paper has addressed the unique ethical and leadership dilemmas faced by the IC workforce, the limitations of traditional face-to-face leadership development efforts, and the broad group of stakeholders affected. This chapter introduces elements needed in a successful virtual framework and strategy, as well as the unique makeup of the current workforce (including the learning styles and values of that workforce). This literature informs how a virtual leadership development course in the IC could be successful.

**Virtual Learning**

The growing availability of the World Wide Web to individual consumers created a new market for educational institutions (Patel & Patel, 2006). As institutions, both for-profit and traditional, realized the current and potential benefits of virtual education, the movement quickly spread. This boom in the virtual education market is evidenced by the rapid arrival of virtual course management software packages in the early years of virtual education. For example, by 2004, over 110 virtual course management software packages were on the market, and in 2015 there were over 450 major virtual learning software packages representing a $56 billion industry (Kim, 2004; McIntosh, 2015). Some of the U.S.’s most reputable institutions, such as Harvard and Duke Universities, were among the first to participate in graduate school virtual learning (Patel & Patel, 2006). With the quick expansion of virtual learning, it is important to understand if the convenience and flexibility translate to effective learning. When virtual courses are created using pedagogically thorough practices, they provide similarly effective learning environments (Driscoll, Jicha, Hunt, Tichavsky, & Thompson, 2012). Early and current
research indicates that there is no significant difference between the quality of face-to-face and virtual education (Kingma & Keefe, 2006; Ya Ni, 2013).

In 2012 a 13-year study that evaluated the outcomes of learners in both a virtual and face-to-face American government course revealed that differences in learning outcomes between the two formats were insignificant (Botsch & Botsch, 2012). The study covered over 3,000 students from, discovered that neither format displayed a clear advantage. Additionally, student performance as measured by grade is not indicative of mode of teaching (Ya Ni, 2013).

Research conducted by Ya Ni (2013), which surveyed 96 institutions affiliated with the National Association of Schools of Public Affairs and Administration (NASPAA), also suggests that participation in virtual public administration courses are less intimidating, and the value and extent of interaction in the virtual format may be improved. The study did note that research methods courses may prove difficult in the virtual format.

**Action Learning**

There is evidence that there are benefits in the use of action learning programs as a means “to develop specific, self-selected leadership skills, and acquire greater effectiveness in building teams and handling problems” (Raudenbush & Marquardt, 2008). Marquardt (p. 3, 2004) describes action learning as “a human resource development tool that simultaneously solves problems and develops leaders and teams.” The primary focus of action learning is to place managers in real situations, and to ask appropriate questions in that environment. There is a strong emphasis not only on what the manager is learning, but how they learn, as well as the context of the learning
Managers in classroom facilitated leadership development courses are often passive and lack energy (Raudenbush & Marquardt, 2008). An action-learning framework may prove beneficial for this sort of learner. The observation that managers may not be active and energized in virtual leadership development training may not hold true when action-learning is a central piece of the learning framework.

**Strategies for Virtual Learning**

The most effective strategy for learning in the virtual format involved conducting group exercises and role-playing that contextualized within course objective scenarios (Liebowitz, 2003). Virtual learning has proven affective for “harder” technical skills (Liebowitz, 2003) and the softer people skills, that have been presumably better suited for a face-to-face learning environment, are also suitable for virtual study given certain strategies are implemented (Liebowitz, 2003). Given the opportunity to undergo role-playing activities that covered the organizational behavior scenarios taught in the course, the virtual learning environment can be an effective environment needed to gain the people skills outlined in the course objectives (Liebowitz, 2003). Learners in the virtual environment must be given the same exposure to the literature and various other resources use in the face-to-face course (Liebowitz, 2003).

Liebowitz (2003) conducted an experiment with students from seven organizational behavior courses he taught using the Can do/ Cannot do survey format. Based on the findings of the survey, along with Liebowitz’s own observations, the students that completed the virtual course believed they achieved the course objectives to at least the same level as those that participated in the face-to-face course. Liebowitz
observed that students in the virtual course likely gained a better handle on the framework for using the people skills techniques, as the time management for the virtual course allowed for more participation and interaction in the role-playing activities.

The findings of the paper are that the course objectives in the virtual format were achieved at a rate at least as good as the face-to-face format, and that there is no significant difference in the effectiveness of either format. These results indicate that if the soft people skills taught in an organizational behavior course can be achieved in the virtual format, it is likely that a similar format is suitable for virtual leadership development courses within a large organization (Liebowitz, 2003).

Virtual teaching is effective in creating an atmosphere where significant ethical knowledge and skills can be developed (Painter-Morland et al., 2003). One of the major benefits of the virtual format relates to the ability to enable cross-cultural interaction on ethical issues as they pertain to the contextual influences of the student’s culture and environment on an ongoing basis (Painter-Morland et al., 2003). As they assessed the value of synchronous virtual courses as a strategy for ethics training, they asked whether teaching issues relating to the moral development process within individuals could be better taught virtually. The authors argue that the virtual teaching method used in their experiment would provide a successful strategy by which ethical understanding might be learned (Painter-Morland et al., 2003). Additionally, they suggest that there are several general goals of ethics teaching that should be considered when conducting a virtual course. These include ethical awareness, ethical reasoning, ethical action, and ethical leadership. The authors theorize that the learning value of a virtual course in ethics lies primarily in the fact that it allows students whose ethical frameworks have been highly
influenced by a diverse set of social, economic, and political contexts to engage one another in discourse that otherwise would likely not occur in a traditional classroom environment.

Due to the rapid acceleration of virtual education, there are certain design challenges present for those that wish to transform face-to-face course into a virtual setting (Bos & Shami, 2006). These design challenges, discussed below, as applied to a virtual role-playing game can be corrected to make face-to-face courses successful virtual (Bos & Shami, 2006).

Three goals need to be met when making the transition from face-to-face learning to successful. These include sustaining engagement, focusing collaboration, and promoting reflection (Bos & Shami, 2006). Previous research suggests that if these three could be achieved through various design goals, the virtual learning environment would prove successful. A design goal is the process of matching technical restraints with academic goals (Bos & Shami, 2006). Three design goals that should be included in virtual learning include increasing responsiveness, supporting small group collaboration, and promoting whole class interaction (Bos & Shami, 2006). For example, a virtual course designer should develop exercises that encourage broader learner participation and create opportunities for students to work together on small and large scales.

Virtual Learning Course Attributes

Research suggests that simulated role-playing activities are a critical element, and a step-by-step framework for selection of exercises, simulation preparation, roles, and techniques of simulation are important (Wedig, 2010). This framework was applied to virtual, face-to-face, synchronous, and asynchronous, distributed and single classroom,
and individual and team formats. The results of the study suggest that given that time and technology resources are available, the virtual asynchronous approach to simulation may be the best option to achieve desired levels of learning (Wedig, 2010).

Simulation is needed in asynchronous virtual learning, and research suggests that this format may be better than in-person learning (Wedig, 2010). This research goes beyond whether virtual learning is feasible, and asks whether it is best. While further research is needed to answer this additional question, the achievements met in Wedig’s virtual framework give further evidence that virtual learning is an acceptable leadership development model.

Focusing on the effects of self-regulated virtual learning in organizational settings, some categorize personal versus social learning strategies and develop measurement scales to do so (Wan, Compeau, & Haggerty, 2012). Such research suggests that self-regulated learning strategies are needed in virtual learning. The variables used, goal orientation, virtual competence, and intellectual demands, are used to measure how learners in a virtual environment who adopt different self-regulated learning strategies have differing outcomes. These findings not only indicate that self-regulated learning strategies are needed, but also gives assistance to virtual learners on obtaining improved learning outcomes through their use of varied learning strategies (Wan et al., 2012).

In examining the relation to the author’s research and dissertation theme of attributes needed in virtual courses, this research offers valuable information for groups that use or plan to use virtual learning (Wan et al., 2012).
Feedback, the a formative assessment in learning environments that allows learners to give and receive input on the progress of their learning, is essential to successful virtual courses (Espasa & Meneses, 2009). Previous research that focuses on three aims (identifying the presence of feedback, characterizing feedback, and explore relationships between feedback and results) suggests that the best markers to determine success of feedback are student satisfaction and final grades (Espasa & Meneses, 2009).

Based on the analysis of existing literature, there are indicators that suggest training topics that are typically reserved for face-to-face environments may be suitable for a virtual setting. Broader research is needed to determine the applicability of these findings in various leader development topics, and to determine if specifics groups of students are more suited for virtual leadership learning. Leadership development topics can be taught in virtual environments given that there are certain attributes and strategies factored into the course. These attributes and strategies involve both the student as well as the course facilitator and in some circumstances the virtual format may be more effective than in person courses. For example, encouraging student engagement through action-learning, and simulated small and large group exercises may suggest the virtual environment as the preferred mode of course delivery.

**Makeup of the Current Workforce**

Today, four, and possibly five, generations work side-by-side in the workplace: Traditionalists (born 1900-1945), Baby Boomers (born 1946-1964), Generation Xers (born 1965-1980), and Millennials ((born 1981-1999) Raines, 2003). According to the U.S. Department of Labor, the population of 65- to 69-year-olds in the workforce is expected to increase by 37% between 2010 and 2020, and workers 70 years old and over
will rise by 38% from 24.6 to 31.8 million (Lerman & Schmidt, n.d.). Such a mix in ages presents a diverse set of views on values and communication that inform an organization as to how it should design and deliver training (Myers & Sadaghiani, 2010).

Considering these characteristics, and how to augment various strengths and weaknesses in each generation, is vital to the success of virtual leadership training. Millennials, for example, tend to work well in teams, are motivated by the impact they have on their organization, prefer a more open and frequent communication channel with their superiors, and are comfortable using technology in how they communicate (Myers & Sadaghiani, 2010). While the previously stated research indicates that Millennials are more comfortable with communicating using technology, Baby Boomers are more likely to identify key information presented on web-based communication (Djamasbi, Siegel, Skorinko, and Tullis, 2011). There are several characteristics in each generation that should be considered, as indicated in figure 2 below, when designing virtual leadership development that targets the broader workforce.

<table>
<thead>
<tr>
<th>Traditionalists</th>
<th>Baby Boomers</th>
<th>GenXers</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loyal</td>
<td>Optimistic</td>
<td>Independent</td>
<td>Protection and safety are important</td>
</tr>
<tr>
<td>Patriotic</td>
<td>Question the status quo</td>
<td>Anti-authority</td>
<td>Center of “self-esteem” movement</td>
</tr>
<tr>
<td>Chain of command is essential</td>
<td>Intensely competitive</td>
<td>Computer pioneers</td>
<td>Technologically savvy; multitaskers of highest order</td>
</tr>
<tr>
<td>Other generations might view them as inflexible, overcautious, not technologically savvy, even slow</td>
<td>Workaholic</td>
<td>Smallest generation; competition for them</td>
<td>Multicultural and tolerant of diversity</td>
</tr>
<tr>
<td>Social</td>
<td>Other generations might view them as self-centered, micromanagers, even uptight</td>
<td>Other generations may view them as slackers, cynical, aloof, even rude</td>
<td>Other generations may view them as needy, indulged, self-absorbed, naive, even entitled</td>
</tr>
</tbody>
</table>
Figure 3. Generational characteristics (Frances-Smith, 2004).

For traditionalists, a virtual leadership development course may present an opportunity to express loyalty and patriotism. On the other hand, the use of advanced technology may create a level of difficulty (perceived or actual) for that generation. While Baby Boomers may use their competitive nature and work ethic as a reason not to participate in leadership development, their social and optimistic characteristics may create a sense of buy-in from that section of the workforce. Both GenXers and Millennials possess perhaps the most conducive level of technological acceptance needed to provide virtual leadership development courses.

Addressing the learning needs of the future workforce may be more important to focus on than investing in leadership development programs that fit the learning style of an outgoing workforce (Baird & Fisher, 2005; Johnson & Romanello, 2005; Wilson, 2004). This is perhaps one of the tradeoffs worth facing; conceding leadership development opportunities for the older generation of the workforce in order to build the infrastructure for the learning patterns of future managers. Nevertheless, a tremendous amount has been put into the structure of how the baby-boomer generation learns and grows as a workforce. Research indicates that those competent and comfortable with virtual environments and are skilled in using technologies will be more effective in achieving virtual learning goals (Wan et al., 2012).

Moving Forward

Support of those that make decisions in an organization, those that hold control over funds, is critical to the project’s success (Kerzner, 2013, p.444). Evaluating whether a project has benefit or adds value is critical for both its success and for those who wish
to advocate for its continuance. Additionally, it is important that a project move in a way that seeks constant improvement (Kerzner, 2013). Not only should organizations ask if what they are doing adds value, but also there should be a constant evaluation to ensure improvement and adaptation to change.

Research reviewed in this chapter demonstrates that when virtual courses are created using pedagogically thorough practices, they provide similarly effective learning environments (Driscoll et al., 2012). Additionally, research exploring the differences between virtual and the face-to-face environment suggested learning outcomes were insignificant (Botsch & Botsch, 2012; Ya Ni, 2013).

Research suggests that simulated role-playing activities are a critical element, and a step-by-step framework for selection of exercises, simulation preparation, roles, and techniques of simulation are important (Wedig, 2010). Additionally, action learning programs and role-playing activities proved important as a means to develop specific leadership skills and acquire greater effectiveness in building teams and handling problems (Liebowitz, 2003; Raudenbush & Marquardt, 2008). Three goals need to be met when making the transition from face-to-face learning to successful. These include sustaining engagement, focusing collaboration, and promoting reflection (Bos & Shami, 2006). Research indicates that those competent and comfortable with virtual environments and are skilled in using technologies will be more effective in achieving virtual learning goals (Wan et al., 2012). Addressing the learning needs of the future workforce may be more important to focus on than investing in leadership development programs that fit the learning style of an outgoing workforce (Baird & Fisher, 2005; Johnson & Romanello, 2005; Wilson, 2004).
This review informs what attributes should be included in a virtual leadership development course by understanding the overall framework and attributes for successful virtual learning. This understanding informs the following sections of this paper, where the researcher will build a framework for elements that should be included in an RFP for transitioning face-to-face leadership development courses to a virtual delivery.
CHAPTER THREE: METHODOLOGY

Restatement of Purpose

The purpose of this paper is to develop a set of elements that IC leadership can use as a framework for soliciting contract proposals to transition current curriculum from face-to-face to the virtual environment. Previous research demonstrates that successful virtual learning is achieved when certain design features that encourage action-learning, role-playing, simulation, and feedback are implemented. These findings inform how virtual learning can be achieved in the field of leadership development.

Introduction to the Methodology

To determine the elements needed within a contract proposal that transitions leadership development to a virtual environment, the researcher conducted a phenomenological qualitative study. This study was conducted in the form of open-ended interviews with practitioners and scholars in executive leadership development, as well as members of the IC workforce that have participated in face-to-face leadership development courses. In this chapter the researcher will describe the methodology used to gather this information, including subject descriptions, measurement procedures, research design, description of the procedures, and the data analysis implementation.

Method Rationale

The method used for this research included open-ended interview questions that were chosen to understand the needs of the IC workforce in the area of leadership development. Open-ended interview questions allowed for each participant to describe their needs and desires concerning leadership development. Once interviews were concluded, the researcher then coded the data, with common themes emerging from the
review (Creswell, 2009; Roberts, 2010). Among the workforce, and compared those themes with the recommendations leadership development scholars and practitioners.

**Ethical and Internal Review Board Considerations**

Prior to invitations being sent to potential subjects, the researcher gained Creighton University Institutional Review Board (IRB) approval. An IRB administrator determined this project is exempt from IRB review, according to federal regulations due to its educational nature. IRB documentation can be found in the appendix of this paper.

Each subject was informed of the research involved in the writing of this paper, an explanation of its purpose, and a description of the procedures to follow the interview. The benefits of the research to the subject, which were explained prior to the interview, include the potential improvement of leadership development in the subject’s organization. The subjects were also informed of the methods by which anonymity would be maintained. This includes not recording or writing down any names, or personal identifiers such as age or specific organization. In addition, participants were not requested to sign any forms or waivers to maintain their anonymity. For interviews that were conducted by telephone, participants gave their verbal consent for the researcher to record the conversation, and were notified of the same methods as those that were interviewed in person.

**The Researcher’s Role**

For this study, the researcher functioned as the interview facilitator. The researcher is both a member of the IC workforce, and therefore a consumer of its leadership development program, as well as a researcher in the field of leadership development with knowledge and interest in relevant topics in that discipline. The
researcher’s biases include the belief that leadership development programs within the IC must be improved. Also, as a member of the information-technology workforce within the IC, the researcher has a bias towards a more prolific use of virtual training. The researcher avoided his own bias by implementing a reflexive exercise in the form of a journal whereby he recorded perceptions and thoughts on the research topic.

**Description of Subjects**

The participants for this study were chosen as a sample of convenience, and because they represent a significant cross-section of the IC’s demographics in experience, rank, and occupation. Experience reflects the length of service in years by the employee, rank reflects the employees status in the organizations hierarchy. The workforce subjects for this study are taken from a variety of tradecrafts within the IC. To maintain the anonymity of the subjects, job titles and specific work rolls were not recorded in the interviews. Generic job functions have been assigned as a substitute. Those in the mission category are those that perform the unique function of their agency. Those with the support role are those that offer administrative or other professional functions not unique to their agency’s particular mission.

Subjects were identified based on current and past personal and business relationships with the researcher. An initial formal invitation was sent to 15 potential participants from the academic and scholarly field of leadership development, as well as those currently offering leadership development training. Out of these invitations, only one subject accepted the invitation. The subject went on to refer the researcher to two other participants, creating a total of three scholarly/practitioner subjects. This form of sampling, the snowball strategy, often ensues once a study has already begun and occurs
when the interviewer asks participants to recommend other potential interviewees. (Creswell, 2009; Roberts, 2010). To create a larger sample, the researcher then proceeded to solicit invitations to those in the IC that have participated in leadership development training. Fifty-four invitations were delivered. Out of the fifty-four invitations, ultimately ten subjects agreed to participate.

The first set of human subjects that participated in this study are anonymous members of the IC workforce that range from junior employees that are within their first five to ten years of their career, as well as upper level management that have been in their careers for twenty or more years. Subjects from the Senior Executive Service were excluded from this study, as the Senior Executive Service currently uses a leadership development structure that is separate from the rest of the workforce.

The second category of interviewees came from those in academia that administer leadership development courses and have authored scholarly papers and books covering the field of leadership development.

| Table 1 |
|-----------------|-----------------|-----------------|
| **Description of Interviewees from the Intelligence Community Workforce** |
| **Subject** | **Experience** | **Role** | **Gender** |
| Subject 1 | 10-15 Years | Mission | Female |
| Subject 2 | 5-10 Years | Support | Male |
| Subject 3 | 15-20 Years | Mission | Female |
| Subject 4 | 25-30 Years | Support | Male |
| Subject 5 | 5-10 Years | Mission | Female |
| Subject 6 | 10-15 Years | Mission | Male |
| Subject 7 | 10-15 Years | Support | Male |
Table 2

Description of Interviewees that Are Practitioners and Scholars in Leadership Development

<table>
<thead>
<tr>
<th>Subject</th>
<th>Leadership Scholar?</th>
<th>Leadership Author?</th>
<th>Practitioner/Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject 8</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Subject 9</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Subject 10</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Instrumentation

Data for this study was collected through personal interviews. Each subject that in the workforce category received the same questions, and the opportunity to clarify questions was provided. Subjects that were practitioners and scholars were also asked identical questions. There was no time limit given to answer each question. For those in the IC workforce category that were interviewed in person, no recording device was used due to the security regulations of the facilities where the interviews were conducted. After each question was answered, the researcher restated the answer as recorded in writing, and the subject was asked to confirm that what was recorded was indeed what they had answered (Creswell, 2009; Bryant, 2004).

For those that were interviewed on the phone, a digital recording device was used to record the entire length of the interview. The researcher then transcribed the interview using word processing software.
Table 3

*Questions Asked to Subjects of the Intelligence Community Workforce*

<table>
<thead>
<tr>
<th>Question 1</th>
<th>What motivates you to participate in leadership development opportunities?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question 2</td>
<td>If you were given the opportunity to participate in a leadership development course, offered virtual by your agency, what elements or activities would need to be included in the course to make it worth your time?</td>
</tr>
<tr>
<td>Question 3</td>
<td>At the end of the course, what outcomes would you need to observe to consider the course a success?</td>
</tr>
</tbody>
</table>

Table 4

*Questions Asked to Subjects that are Practitioners and Scholars in Leadership Development*

<table>
<thead>
<tr>
<th>Question 1</th>
<th>If you were asked to consult a government agency in transitioning their leadership development program from face-to-face to the virtual environment, what recommendations would you offer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question 2</td>
<td>If your organization was asked to produce a virtual leadership development course for a government agency, how would you approach that, meaning where would you start?</td>
</tr>
<tr>
<td>Question 3</td>
<td>How do you measure success in delivering a leadership development course?</td>
</tr>
<tr>
<td>Question 4</td>
<td>Would you measure success differently for a virtual leadership course as opposed to measuring success with a face-to-face course?</td>
</tr>
</tbody>
</table>

**Data Collection Procedures**

Data collection began in October 2014 and was completed by December 2014.

On September 19, 2014 e-mail requests for interviews were sent to potential subjects.
The invitation was to participate via person or by telephone. Those that did not reply within a week received follow-up telephone call from the researcher to inform them that an e-mail had been sent inviting their participation. Respondents were assured that their identity and organization would remain anonymous. Initial invitation for participation received only one affirmative response, and therefore further invitations were offered through phone conversations on September 29, 2014. Respondents were finalized by the week of November 3, 2014. All interviews were concluded by December 1, 2014.

**Data Analysis Plan**

After the seven in person and three telephone interviews were conducted, the researcher reviewed and typed the handwritten notes, and transcribed the audio recording of the phone interviews. The researcher then examined the transcripts as a whole, and made notes based on first impressions. The researcher then read the transcript again, one-by-one in a more focused line-by-line reading, coding emerging themes by labeling relevant words, phrases, sentences, and sections. This coding was applied to elements of the interview based on the researcher’s recognition that the topic or phrase was repeated, because the interviewee stated its importance, the concept could be found in published literature, or it was related to a theory or concept reviewed in the study. These responses were coded as a conceptualization of underlying patterns (Creswell, 2009; Roberts, 2010).

Next, the researcher read through all of the codes created, and created new code by combining relevant responses. The researcher then used these combined codes and labeled them in specific categories or themes. Once the researcher labeled categories of
the groups, connections between the themes were described. These categories and connections are considered the primary results of this study (Creswell, 2009).

Because the goal of this study is to determine what elements of leadership development should be included in a contract proposal, a hierarchy was created among the categories. This was done so that a government official executing a contract for virtual leadership development could evaluate and prioritize each element based on resources.

**Quality, Verification, and Limitations**

To further validate the findings of the study, the researcher provided each interviewee a summary of the data collected in their interview. Each interviewee concurred with the researcher’s interpretations. Based on review of the data by the interviewees, adjustments were made to clarify the need for continuous mentorship and continuous feedback (Creswell, 2009).

The primary limitation of the study is the small sample size. Having interviewed seven IC employees may limit the ability to generalize to the seventeen agencies that make up the IC. Also, the three scholar/practitioners represent a small sample size, though likely more generalizable based on the smaller pool of executives leading academic leadership development efforts.

**Methodology Summary**

In this chapter the researcher discussed the methodology for this study, including a phenomenological qualitative analysis of open-ended interviews with scholars and practitioners, as well as employees of the IC. The researcher’s methodology plan
includes extracting common themes from in-person and telephone interviews. The respondents verified the quality validity of the study, and only minor changes were made.

The following sections of this paper will introduce and explain the findings of this research plan, and will offer evidence-based solutions based on the data collected in the interviews described above.
CHAPTER FOUR: FINDINGS

Findings Introduction

The purpose of this paper is to develop a set of elements that IC leadership can use as a framework for soliciting contract proposals to transition current curriculum from face-to-face to the virtual environment. To answer the research question of what elements should be included in a Request for Proposal (RFP) for a virtual leadership development course for IC employees, the researcher reviewed significant literature on the subject of virtual learning. Additionally, the researcher conducted a phenomenological qualitative study in the form of open-ended interviews with practitioners and scholars in executive leadership development, as well as members of the IC workforce that have participated in face-to-face leadership development. In the following chapter, the researcher will present eight elements or themes that should be included in an RFP for leadership development in the IC, and an analysis of these findings. The researcher will also present a template Request for Proposal that Intelligence agencies can use as a base for soliciting contracts for virtual leadership development based on the findings from this research.

Summary and Presentation of the Findings

Through the interviews conducted, eight primary themes emerged as important to include in a virtual leadership development course. These eight themes include self-understanding, action learning, interaction, context, knowledge evaluations, follow up, mentorships, and self-advancement. Transcripts and thematic coding data can be found in the appendix of this paper. Throughout all of the interviews, no respondents expressed that they would not want to participate in a virtual leadership development course, and
only one respondent suggested that a blended virtual and face-to-face learning environment would be preferred over strictly face-to-face or virtual. The themes that emerged from the data collection reflect what both leadership development consumers as well as deliverers believe to be important. The data are organized by the number of unique instances that each theme was discussed in the interviews.

**Self-understanding**

As we reviewed in previous research, when it comes to virtual learning strong emphasis should be placed on what an employee is learning, and how they learn as well (Raudenbush & Marquardt, 2008). In twenty-three separate instances, the interviewees expressed the need for leadership course elements that emphasized a greater understanding of self. For example, Interviewee 10 stated, “self-understanding is huge. Strengths, weaknesses, how to address challenges in neutral environment. It’s good to have peers and veterans as a sounding board.” The most common responses associated with self-understanding referenced the Myers Briggs Type Indicator tool, 360 assessments, and other generic references to self-assessments. With respect to self-assessments, Interviewee 4 stated, “Something like MBTI or other assessment that really focuses on understanding yourself.” Many other responses were not specific examples of tests or assessments, but directly stated the need for further self-understanding and knowledge. Multiple interviewees in response to separate questions repeated the theme of self-understanding, which also indicates a particular need. The theme of self-understanding was present in the responses from the practitioners and scholars, as well as interviewees that represent the IC workforce. Interviewee 1, a leadership scholar and practitioner stated that, “the most important component of any leader development
program, whether it’s face-to-face or online, is the opportunities for individuals to explore their greater inner knowledge, to increase their self-awareness about their core values, who they are as leaders, to explore reflective questions such as why do they lead’. Self-understanding relates closely to the seven additional themes discussed in the following sections of this paper, as each theme could be considered a segment of self-understanding. Self-understanding is included as an individual theme due to the emphasis placed by the interviewees, as well as to create greater specificity within the remaining themes. For example, in action learning there is a strong emphasis on what the manager is learning, as well as how they learn.

Figure 4. Self-understanding interview responses.

**Action Learning**

Marquardt (2004) describes action learning as a “development tool that simultaneously solves problems and develops leaders and teams.” The primary focus of action learning is to place learning in real situations or simulations, to ask appropriate
questions in that environment, and reflect on the learning experience. The interviewees of this study indicated in seventeen unique instances the need for some form of action learning. For example, Interviewee 1 stated, “And some of those high-impact leadership develop interventions include things like action learning components, so that [in] an online platform I would build an action learning experience for participants; whether that’s an individual action learning activity or a team action learning activity, or both.”

The most common responses included the need for simulations, scenario-based roleplaying activities, as well as how to deal with difficult situations in a safe practice environment. The other responses were thematically associated with action learning. For example, Interviewee 7 stated, “[I would like to experience] scenarios that we could work through. Kind of like labs” and Interviewee 5 stated that they would want to experience “some sort of team or role playing activities that have scenario based decision making.” As previous research suggests, there are benefits in the use of action learning programs as a means “to develop specific, self-selected leadership skills, and acquire greater effectiveness in building teams and handling problems” (Raudenbush & Marquardt, 2008).
In sixteen separate instances, the interviewees stated the importance of interaction as an element of a virtual leadership development course. Interaction was separated from action learning as the responses for interaction include experiencing diversity, networking, and thoughtful dialogue as part of the course – as opposed to action learning, which emphasizes simulations. Previous research indicates that one of the major benefits of the virtual format relates to the ability to enable cross-cultural discussion and debate on ethical issues as they pertain to the contextual influences of the student’s culture and environment (Painter-Morland et. al, 2003). There was also an element of comradery and support evident in the responses by those of the IC workforce. For example, Interviewee 8 stated, “Experience diversity and networking is [...] a motivator. It’s good to be around peers—people who are going through the same situations, and interact” and
Interviewee 6 stated. “There needs to be an interactive element, not just watching recordings.”

![Breakdown of Findings](image)

*Figure 6. Interaction interview responses.*

**Context**

As previous research indicates, there is a strong emphasis not only on what a student is learning, but how they learn, as well as the context of the learning (Raudenbush & Marquardt, 2008). There were thirteen unique instances where respondents indicated that an important element of virtual leadership development in their organization should be context, meaning that it should be related to their occupation. For example, Interviewee 9 stated,

“I’ve taken leadership development classes in the past where they work commercially driven scenarios that were not necessarily applicable to the government work roles that we are in. I would like to see some leadership
development scenarios played out in the course that apply to everyday situations Government employees face.

Several interviewees emphasized that it was important that the materials and exercises in a leadership development course be aligned to their profession, as well as their organization’s mission. In other words, it was important for respondents that a course include scenarios often faced in their day-to-day occupation. Interviewee 2 stated, “Context to me matters so much around leadership development. For whom, and what are their end goals for folks.” As previous research indicates, effective strategies for learning in the virtual format involve conducting group exercises and role-playing that fit within specific objectives and contexts (Liebowitz, 2003).

*Figure 7. Context interview responses.*
Knowledge Evaluations

Closely related to self-understanding, knowledge evaluations also provide an opportunity for the essential practice of reflection (Bos & Shami, 2006). As stated by Interviewee 2, “I think survey [what] people already know. Developmentally or professional skills. All that knowledge comes into play.” Knowledge evaluations, which are a form of feedback, provide formative assessments in learning environments that allow learners to give and receive input on the progress of their learning (Espasa & Meneses, 2009). Twelve times respondents expressed that knowledge evaluations were an important element of leadership development. For example, Interviewee 1 states, “The first place I would begin is doing some surveys and questionnaires about what the particular audience thinks they need to know and be able to do well in their leadership. So, to try to get a sense of where the audience is and what the needs are.” Knowledge evaluations differ from understanding oneself in that knowledge evaluations provide a snapshot of one’s understanding on a certain topic (both before, during, and after a course), while self-understanding tools provide the learner with knowledge of strengths and weaknesses found within their own personality and traits.
Follow-up

There was strong response, ten unique instances, where interviewees believed that a learning system should offer support after the end of the course. This support may include some other elements discussed in this study, such as 360 assessments, knowledge tests, and interaction. As Interviewee 6 stated, “there should be an ongoing supporting framework.” As previous research indicates, the virtual format relates to the ability to enable cross-cultural interaction on ethical issues as they pertain to the contextual influences of the student’s culture and environment on and ongoing basis (Painter-Morland et al., 2003). Interviewee 1 stated, “the biggest advantage, I think, of an online platform is to continue to the participants learning, over time. Because if they are already accustomed to that kind of learning and it is so much easier too, once a program ends formally, to continue to provide resources online or modules to alumni of programs and so forth.” What differentiates follow-up from other elements discussed in this research is
the long-term focus that allows learners to reflect and assess their knowledge once they have re-entered their work environments, and can then apply their knowledge and understanding to real circumstances.

Figure 9. Follow-up interview responses.

**Mentorships**

A significant characteristic that routinely appeared in interview responses was the need for mentorship opportunities. For example, Interviewee 5 stated, “I would also want to see some senior leaders participating for both their experiences and help.” Seven unique instances mentorships were expressed as important. Additionally, Interviewee 1 stated it was important for participants to “find wise mentors that they’d be able to also reach out to virtually and continue their learning through role models and mentors as well. Previous research indicates that it is important is to place learner real situations where they can ask appropriate questions, which mentors could be present to consult (Raudenbush & Marquardt, 2008).
Being on the receiving end of mentorships was not the sole approach in the responses. In one instance, an interviewee stated that it is important to be a mentor, not merely a mentee. For example, Interviewee 9 stated, “the people side of things is still important and the soft skills too. It’s also important to meet others, mentor others, and view others in different leadership development stages.”

![Breakdown of Findings](image)

*Figure 10. Mentorships interview responses.*

**Self-advancement**

The final characteristic that appeared in a significant number of responses was the theme of self-advancement. Two interviewees stated directly that career advancement was a primary factor in their participation in leadership development, while several others inferred both career and other types of growth. For example, Interviewee 5 stated that they are motivated to participate in leadership development courses “primarily career advancement. There’s a need for leadership skills at the next level.” The two
interviewees that cited career advancement directly, interviewees 5 and 6, both likely fit into the millennial generation based on length of professional experience. This aligns with previous research that suggests the perceptions millennial generation is focused on the self (Djamasbi, Siegel, Skorinko, and Tullis, 2011).

![Figure 11. Self-advancement interview responses.](image)

**Analysis and Proposed Solution**

The results of the findings of this study suggest that the IC workforce requires a highly interactive, reflective, and continuous leadership development experience. A request for proposal for leadership development by an IC organization should include requirements that include these themes. Absent from the responses is the desire for passive participation such as lectures or videos. What is more, the respondents emphasized a desire to learn and grow in their personal leadership development
experience. This demonstrates the requirement to maintain a personal element to a virtual leadership development course.

The strong response for follow-up, mentorships, and networking demonstrates the need for an ongoing leadership development support structure, not merely a one-time resource or experience. This, along with the need for knowledge tests and evaluations, demonstrates the desire IC employees have for actual learning and self-improvement in the area of leadership development.

Two respondents in the interviews indicated that leadership development was important in advancing their careers, and that promotion panels look at résumés to determine if leadership development experiences are present. The researcher did not include these answers in the primary themes, as only two interviewees indicated career advancement as a factor. However, other interviewees may believe that career advancement is a motivating factor for participating in leadership development, yet respondents may have decided not to discuss career advancement due to a negative perception of their motives. Because of the emphasis that the two respondents placed on career advancement, feedback was included in the self-advancement data.

The data gathered adds validation to several assertions made in previous research discussed earlier in this paper in the literature review. Self-understanding, action learning, knowledge evaluations, mentorships, and follow-up can are all elements needed for virtual leadership development that incorporate feedback. These characteristics of virtual leadership development, as Espasa and Meneses (2009) explain, should identify the presence of feedback, characterize feedback, and explore relationships between feedback and results. In addition to assertions made concerning feedback, the data
gathered for this research also validates Liebowitz’s (2003) belief that group exercises and role playing should be central to virtual learning – affirming the need for action learning as a characteristic of virtual leadership development. Action learning, which was a significant response given by interviewees, also affirms Wedig’s (2010) suggestion that managers often are passive and lack energy in leadership development courses, and that a course should have characteristics that are focused and hold the attention of the participants.

**Findings Conclusion**

In this chapter the researcher discussed and analyzed the findings from 10 interviews, this discussion included a summary and presentation of the eight primary themes that emerged as important to include in a leadership development virtual course. These eight themes include self-understanding, action learning, interaction, occupation specific, knowledge evaluations, follow-up, mentorships, and self-advancement. The data gathered in the interviews adds validation to several assertions made in previous research discussed in this paper, especially those relating to feedback and action learning. These elements should be the foundation for a statement of objectives within a request for proposal that a government entity might use in soliciting services for a virtual leadership development course.

The findings presented in this chapter confirmed that the most effective strategy for learning in the virtual format involved conducting group exercises and role-playing that contextualized within course objective scenarios (Liebowitz, 2003; Marquardt, 2004; Espasa & Meneses, 2009). Additionally, the results of this phenomenological qualitative study confirm that enabling cross-cultural discussion and debate on leadership issues as
they pertain to the contextual influences of the student’s environment on an ongoing basis is essential to virtual leadership development (Painter-Morland et al., 2003). Due to the strong relationships between the examined literature and the interview results, the eight themes will form the foundation for the recommendation in the following chapter of this paper, as well as the foundation for its implementation.
CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS

Introduction

The following pages provide a framework that those in the Intelligence Community should use for creating or soliciting contract proposals to transition current curriculum from face-to-face to the virtual environment. In the previous pages, a set of elements were discussed as important to include in virtual leadership development. In the following chapter, the researcher will discuss a summary of the study, implementation of the solution and implementation considerations, assessment approach, internal and external implications for the organizations involved, and recommendations for further research.

The research question for this study is what elements should be included in a Request for Proposal (RFP) for a virtual leadership development course for IC employees. Through research conducted for this paper, eight primary themes emerged as important to include in a virtual leadership development course. These eight themes include self-understanding, action learning, interaction, context, knowledge evaluations, follow up, and mentorships. The researcher recommends that further investigation be dedicated to determining broader applicability and actual cost savings of implementing virtual leadership development.

Through the interviews conducted and the literature review, eight primary themes emerged as important to include in a virtual leadership development course. The findings presented in the previous chapter confirmed that the most effective strategy for learning in the virtual format involved conducting group exercises and role-playing that contextualized within course objective scenarios (Liebowitz, 2003; Marquardt, 2004;
Espasa & Meneses, 2009). Additionally, the results of this phenomenological qualitative study confirm that enabling cross-cultural discussion and debate on leadership issues as they pertain to the contextual influences of the student’s environment on an ongoing basis is essential to virtual leadership development (Painter-Morland et al., 2003). The themes that emerged from the data collection reflect what both leadership development consumers as well as deliverers believe to be important. The data gathered in the interviews adds validation to several assertions made in previous research discussed in this paper, especially those relating to feedback and action learning (Marquardt, 2004; Espasa & Meneses, 2009).

The eight elements that emerged from this study were included in a sample RFP in the following pages based on three primary reasons. First, there was a significant link between the previous literature reviewed and interview findings as discussed previously. Second, their inclusion in the learning desires of the workforce sample group interviewed, and finally, the consistency with themes that emerged from those interviewed that are practitioners and scholars in leadership development. Because of this validation between previous literature and the interviews conducted, these eight elements should be the foundation for a statement of objectives within a request for proposal that a government entity might use in soliciting services for a virtual leadership development course.

**Request for Proposal Statement of Objectives Overview**

These findings inform how a government entity should construct a Statement of Objectives (SOO) portion of a Request for Proposal in order to award a contract to an outside organization. In essence, an RFP is the federal government’s open solicitation to
the business community for bids on goods or services of more than $25,000.

Government contracts are subject to many statues, regulations, and policies which are intended to encourage competition and maximize the cost savings for U.S. citizens.

Perhaps the most extensive regulation and federal contracting is the Federal Acquisition Regulation (FAR). The FAR is found in parts 1 through 53 of Title 48, Chapter 1 of the Code of Federal Regulations. The primary ways that businesses can find out about contract solicitations is through FBO.gov (Federal Business Opportunities) and RFP–EZ.gov –the latter designed to be a more simplistic and guided avenue for small businesses to bid on government contracts.

The basic elements of a request for proposal are the statement of objectives, award termination, past performance, price, description, and solicitation ordering. The award determination is the description of how the winning bid will be chosen. Past performance is a description of how the government will evaluate past performances to determine if that company is suited for the award. The price is a description of how the government entity that is soliciting bids will evaluate proposed pricing by businesses.

The description goes into little bit more detail on the services to be rendered. An informal review of RFPs for leadership development on FBO.gov demonstrated that some were very broad, only stating that leadership development training services were needed, while others were as detailed as to state the length of the instruction and number of participants expected.

Perhaps the most important element of an RFP for the purposes of this paper is the Statement of Objectives (SOO). The SOO is a document created by the government and incorporated into the RFP that states the overall performance objectives of the
contract. It is used in RFPs when the government intends to provide flexibility to potential vendors to propose a creative approach. The SOO is a short document, often under 10 pages, that provides the basic overall objectives of the acquisition. This document offers the bottom line goals of a virtual leadership development program and allows vendors to propose unique and innovative solutions that will achieve the overall goal of the contract. The following section of this paper the author will outline elements that government officials in the IC should include and a SOO for transitioning leadership development to the virtual environment. Because the SOO is supposed to offer innovation and flexibility when soliciting government contracts, course elements, content, deployment, and evaluation are guidelines for the basic elements that should be present in any proposal. In other words, this section of the paper should be seen as a minimum set of requirements for any proposal based on the literature that has been reviewed above and the data collected for this research.

<table>
<thead>
<tr>
<th>Statement of Objectives for Virtual Leadership Development for Federal IC Employees</th>
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<tr>
<td><strong>Background</strong></td>
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</table>

The Office of the Director of National Intelligence (ODNI) seeks a contractor to assist in the development and facilitation of a comprehensive virtual leadership development program for the civilian employees of the United States IC agencies. Work will begin 1 October 2015 and end no later than 30 September 2017. The contractor shall work under the direction of the Chief Human Capital Officer.

The U.S. IC is a coalition of 17 agencies and organizations, including the ODNI, within the Executive Branch that work both independently and collaboratively to gather and analyze the intelligence necessary to conduct foreign relations and national security activities. Members of the IC include:

- Air Force Intelligence
- Department of the Treasury
- Army Intelligence
- Drug Enforcement Administration
• Central Intelligence Agency
• Federal Bureau of Investigation
• Coast Guard Intelligence
• Marine Corps Intelligence
• Defense Intelligence Agency
• National Geospatial-Intelligence Agency
• Department of Energy
• National Reconnaissance Office
• Department of Homeland Security
• National Security Agency
• Department of State
• Navy Intelligence

**Scope**

The contractor shall provide overarching leadership development training services that will include a full array of support in accomplishing the vision and mission of ODNI’s Human Capital Office. These services include, but not limited to development, testing, delivery, and evaluation of comprehensive virtual leadership development training to civilian employees of the IC from ranks GS-5 to GS-15.

**SOO: Objectives**

The leadership development courses offered shall incorporate leadership training best practices to assist participants in realizing higher personal and organizational performance by incorporating the following learning themes into the leadership development curriculum:

- Self-understanding
- Action learning
- Interaction
- Context
- Knowledge Evaluations
- Follow-up
- Mentorships
- Self-advancement

The provider will work with the various IC agencies to design and deliver a virtual leadership development program for civilian intelligence officers. The provider will also serve as a faculty member of the interactive elements of the leadership program, serving as a content expert in the areas listed above. The provider will be responsible for:

• Collaborating with IC staff to design a leadership development curriculum to be administered virtually across a geographically dispersed employee population.
• Design and delivery of role-based exercises that build on and reinforce the models
and modules of the training.
• Organize and facilitate a webinar held before the course and as follow-up to assist participants in understanding personal learning strategies.
• Delivery of report evaluating the impacts of the program and recommendations for any modifications at the end of each year of the program.

SOO Format: Tasks

Preparatory work will commence in Quarter 1 of fiscal year 2015, and the program will launch in Quarter 4 of fiscal year 2015. The consultant’s involvement will continue through the three years of the program. Program deliverables include:

<table>
<thead>
<tr>
<th>Program Development</th>
<th>Timeline for First Year</th>
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<tbody>
<tr>
<td>Participation in Leadership Program planning and software design meetings with ODNI and other IC strategic partners</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>Development of evaluation criteria and methodology, with particular emphasis on ethics program</td>
<td>Q4 2015</td>
</tr>
<tr>
<td>Develop program materials for curriculum</td>
<td>Q1 2016</td>
</tr>
<tr>
<td>Program Delivery and Evaluation</td>
<td></td>
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<tr>
<td>Deliver select pilot modules</td>
<td>Q1 2016</td>
</tr>
<tr>
<td>Deliver revised modules</td>
<td>Q3 2016</td>
</tr>
<tr>
<td>Provision of virtual feedback session to interested students over 9 month period</td>
<td>Q1 – Q4 2016</td>
</tr>
<tr>
<td>Participation in/Facilitation of Webinars on leadership topics</td>
<td>Q1 – Q4 2016</td>
</tr>
</tbody>
</table>

SOO Format: Delivery

Beginning in Q1 FY 2016, 12.5 percent of the workforce shall receive leadership development training each quarter. The delivery of the final report for the year shall be delivered to the Human Capital Officer, ODNI no later than November 15, 2016. The Human Capital Officer will issue a notification of receipt upon delivery of the final report.

SOO Format: Government-Furnished Property

The contractor shall have full access to hardware and non course-related software to perform the duties on the project while performing duties in government space. Government shall furnish all office space, equipment, including both computer hardware (not to include software), necessary for the contractor to perform the assigned work on-site, unless otherwise specified, to fully satisfy all operational requirements of this contract. All Government Furnished Property referred to in this clause will remain the property of the Government, or its contractor, and under that entity’s control at all times. The Government retains the right to withdraw or reallocate these resources at any time, and without notice, during the performance of this contract.

SOO Format: Security Requirements
All contractors representing the awarded vendor must possess the requisite security clearances to access ODNI facilities and facilities of the various IC agencies.

**SOO Format: Place of Performance**

The place of performance shall be at 200 MacDill Blvd, Joint Base Anacostia Bolling, Washington DC 20340-5100, and infrequent temporary assignments may be located at various intelligence agency locations.

**SOO Format: Period of Performance**

The period of performance will begin the first day of the fiscal quarter immediately following the issuance of the contract award, and will last three years thereafter.

*Figure 12. Sample statement of objectives for a request for proposal.*

**Existing Resources for Leadership Development**

Several resources are available to enhance leadership development in the IC through a transition to a virtual format. Funding, relationships, participation, need, and support are present and can be leveraged to implement a new solution (United States Department of Defense, 2013).

Because there are already leadership development programs in place, existing budgets for such efforts are also available (Center for Leadership Development, n.d.). That there is money allocated for leadership development also indicates that there is support from senior leadership and perhaps congress. There are also existing relationships with leadership development organizations that currently provide such services. These relationships could likely continue under a new virtual model to provide continuity and maintain momentum when delivering the new service. Finally, a key resource available for virtual leadership development is the need (Hatfield, 2008). A need creates an environment where a solution is welcome. This will be critical in creating buy-in for the leaders that implement this project.
Potential Barriers and Obstacles to Proposed Solution

Although mentorship is one of the eight essential elements found in this study and in previous research (Raudenbush & Marquardt, 2008), many of the potential barriers rest with those that reside in the Senior Executive Service (SES). Because members of the SES are the decision makers when it comes to major program and budget changes, and this change would have the most perceived negative impact on that group, creating buy-in from the SES corps will likely be a challenge. Although the SES would present a potential barrier, the flexibility of virtual leadership development would be a benefit, as arranging traditional senior executive leadership development can be difficult, and often takes managers away from their offices and programs for significant amounts of time.

This flexibility though could also present a barrier, as managers may be seeking an opportunity to leave the distractions and stresses of their home offices to focus solely on their leadership training. Additionally, SES executive training is often considered a rite of passage for those entering the highest ranks of public service. There may be a perception by those entering SES positions that their ascension was not as prestigious because they did not attend the notable leadership institutions attended by their predecessors.

Resistance to virtualization may also prove to be a barrier in achieving this form of leadership development within the government ranks. Although research has demonstrated that multiple generations are suited for virtual learning (Djamasbi et al., 2011), the change of long-standing practices in leadership development may be difficult for many. This could be accompanied by a perceived loss of funds, as funds would likely be diverted from traditional programs.
In short, many of the barriers and obstacles that implementing virtual leadership development concern institutional norms and resistance to change. There are potential technology obstacles that will be encountered, as there would be with the deployment of any new IT service, but these obstacles are not likely to prevent the solution from being implemented.

**Implementation and Assessment Approach**

As a new concept and new format for leadership development within the IC, a phased approach is likely the most efficient and effective way to go about implementing such a change. The phased approach will act as a pilot, and changes and improvements can be made before full implementation occurs. There is a practical reason for a phased approach as well. As IC agencies transition from individual IT infrastructure to the single unified IC ITE infrastructure, this transition will be done in a phased approach. Phasing timeline would be dependent on the transition of each agency to the IC network. Following each agency’s transition, they could also transition to the virtual leadership development program could follow. Because IC agencies will eventually be on a single IT infrastructure within the next several years, building a learning platform on the IC ITE network would be a long-term effort as opposed to building a short term platform on individual agency networks.

Evaluating the implementation of the project should be focused on money saved, growth of the participants, and participation of leadership development by the IC workforce. The growth of the participants can be determined by through pre-post evaluations that measure the grasp participants have on the critical concepts taught in the course. Surveys that measure employee’s perception of their growth also could be used.
These could then feed into benchmarks for broader categories that measure success for individual units or agencies, and could then be used to assess the progress and success of the IC as a whole. Finally, measuring cost savings is critical to evaluating the implementation of the project. Because there will be broader participation, and therefore perhaps a cost benefit rather than cost savings, leaders that implement this project should evaluate cost savings based on cost per individual participant, not the overall cost of the program.

**Internal and External Implications for the Organization**

With this change, there may be certain implications that leaders within the IC and its agencies will face. These implications are primarily political and financial. If cost savings are realized through this project, leaders within these organizations may face a reduction in funding, which often happens when funds are perceived as not needed by the organization. Because this reduction in funding would come from Congress, this would also drift into the realm of a political implication – straining relationships between organizations and elected officials.

Internally, there may be implications concerning employee and supervisor relationships. The proliferation of virtual leadership development will provide more opportunities for employees to participate in such efforts, and therefore time must be allocated in the employees schedule for such development. A cultural shift will need to occur to create an environment where managers support leadership development. This is an opportunity for the project champion and IC leaders to influence a positive cultural shift.
Recommendations for Further Research

This study has focused largely on what is needed in a virtual leadership development course for the IC. An internal government study is needed to assess the cost-savings or cost-avoidance associated with such an effort. Because the budgets of individual intelligence agencies are not available to the public, this future research must be completed or facilitated by the government.

Other large agencies outside of the IC could benefit from this study. There may be broad applicability if other agencies are operating in a highly selective, face-to-face leadership development model. There may also be agencies that are not engaged in leadership development, either face-to-face or virtual, that could implement a phased virtual model. This study would also benefit from future discussions with major private organizations that provide leadership development services. Understanding their experiences, operational models, and pedagogy would offer insight into how virtual leadership development could be implemented.

Earlier research was cited in this study that suggests simulation is the best option to achieve desired levels of learning in leadership development (Wedig, 2010). To determine the full applicability of this study as it relates to the government leadership development environment, similar courses must be taught with and without the use of simulations to understand if this is a critical factor to student learning success. If further proven that virtual asynchronous simulation is preferred in such environments, it may also be preferred in organizational training.

The focus of this study has been on a shift in the delivery of large-scale leadership development. Future research should be conducted to determine if this study has
applicability on a small scale for smaller government agencies. Because there may be significant initial up-front costs associated with implementing virtual leadership development, more research is warranted to determine the cost savings for smaller organizations.

Finally, this paper builds the foundation for others to study the impacts that leadership development has on the sustainability of an organization. Previous research indicates that employee turnover is associated with decreased performance (Ton and Huckman, 2008). More research should be conducted to determine how broader leadership development affects turnover, and therefore can prevent an organization from spending valuable resources associated with turnover.

Summary

The findings presented in this study demonstrate that the most effective strategy for conducting leadership development courses in the virtual environment involves the implementation of eight elements, to include action-learning and group exercise that use role-playing that contextualize course objective scenarios (Liebowitz, 2003; Marquardt, 2004; Espasa & Meneses, 2009).

Face-to-face leadership development courses provided by IC agencies to employees are costly, and therefore limit the number of employees that can participate in the training. IC employees face unique leadership challenges, and broader application of leadership development is needed. Due to the unique ethical and leadership dilemmas faced by the IC workforce, the unique makeup of the current workforce (including the learning styles and values of that workforce, and the broad group of stakeholders
affected, the IC should transition from face-to-face leadership development to a virtual environment.

Through this study, eight primary themes emerged as important to include in a virtual leadership development course. These eight themes include self-understanding, action learning, interaction, context, knowledge evaluations, follow up, mentorships, and self-advancement. The findings presented confirmed previous research that the most effective strategy for learning in the virtual format involved conducting group exercises and role-playing that contextualized within course objective scenarios (Liebowitz, 2003; Marquardt, 2004; Espasa & Meneses, 2009). Through a phenomenological qualitative analysis through open-ended interviews with scholars and practitioners, as well as employees of the IC, eight elements that emerged from this study were included in a sample Request for Proposal that should be used by IC decision makers to solicit bids for organizations to provide virtual leadership development courses. Their inclusion is based on three primary factors. First, there is a significant link between the previous literature reviewed and interview findings. Second, their notable inclusion in the learning desires of the workforce, and finally, the consistencies that emerged in responses from practitioners and scholars in leadership development.

Although there are certain obstacles that this change may present, including resistance to change based on potential perceived loss of funding or prestige, these eight elements should be the foundation for a statement of objectives within a request for proposal that a government entity might use in soliciting services for a virtual leadership development course.
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Virtual Leadership Development


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Appendix A

Interview transcripts with leadership scholars and practitioners

**Interview 1: Transcription**

**Researcher (Question):** All right, our first question is if you were asked to consult a government agency and transitioning their leadership development program from a face-to-face to virtual environment what recommendations would you offer in that transition?

**Interviewee (Answer):** I first would say the most important, um, component of any leader development program, whether it’s face-to-face or online, is the opportunities for individuals to explore their greater inner knowledge, to increase their self-awareness about their core values, who they are as leaders, to explore reflective questions such as why do they lead. Um, to have a greater understanding of how they land on others, so that would be kind of the first for me – the essential thing not to lose in transitioning from face-to-face to online, and I think the component around self-awareness in leadership development, inner knowledge, is deliverable both face-to-face and online—so that would be my greatest advice, to maintain that.

The other second thing I would say is to design ways creatively in which individuals through an online platform can engage with others. And share their learning, and to consult with others online about their experiences in leadership, how they can network with others, how they can consult with others about particular challenges that they’ve experienced in their leadership, where they might be able to find wise mentors that they’d be able to also reach out to virtually and continue their learning through role models and mentors as well.
**Researcher (Question):** When you say land on others, can you describe what you mean there?

**Interviewee (Answer):** Sure, it’s some of the work that Dan Goldman has done and his colleagues Andy McKee and so forth, on emotional and social intelligence, and part of the framework around social emotional intelligence is not only understanding who you are, but how you impact other people or how you as a leader are received by others. And what resonance you have as a leader in working with others. And Goldman and others, his colleagues, have the premise that leadership is relational, and because leadership is relational it really behooves individual leaders to gain that awareness, and part of how they gain it is through asking themselves deeper questions and doing self-examination, and also gathering feedback from others so that they can have a greater awareness and more insights in their behaviors and how they influence others, or how they don’t influence others. So about land on others, it’s more about your resonance.

**Researcher (Question):** If your organization, organization you’ve been involved with in the past, was asked to produce an online leadership development course for a government agency how would you approach that?

**Interviewee (Answer):** Meaning, developing the content?

**Researcher (Question):** The content, or sort of from an administrative perspective. Where would you begin?

**Interviewee (Answer):** The first place I would begin is doing some surveys and questionnaires about what the particular audience thinks they need to know and be able to do well in their leadership. So, to try to get a sense of where the audience is and what the needs are, so I would do a needs assessment. I would probably try to do within that needs
assessment a little bit of a gap analysis to see what already is being offered and what’s missing, and how could an online platform target what’s missing, so that’s, I’d start there. I’d also obviously add on to what we know as experts in leadership and what the field has produced around high-impact leader development interventions. And some of those high-impact leadership development interventions include things like action learning components, so that [in] an online platform I would build an action learning experience for participants; whether that’s an individual action learning activity or a team action learning activity, or both.

We also know from leader development research that having the ability to process critical incidents that leaders experience in real time is important, and so I would craft something around the curriculum where participants can process critical incidents with more experienced leaders, or within the group itself, you know, the consultative model. So, and again about what I mentioned earlier, the whole component of self awareness and inner knowledge, even if the survey came back and didn’t have that as a need I would still put it as a need, because we know we’ve known this for decades that this is one of the most important elements of leader development program.

**Researcher (Question):** So how do you measure, or how would you measure success when delivering a leadership development course?

**Interviewee (Answer):** That’s a huge question, how to measure success! I would definitely do some pre-post-assessments. So, I would try to get a snapshot even though the limitation here is self reporting, but I would get a snapshot of where the participants believe they are in what they know around leadership concepts, like leading change, and emotional and social intelligence, and, the strengths-based leadership, but whatever those
modules would include, and then I would include another snapshot at the very end of the program, and I would do a snapshot three months out, six months out, and a year out to kind of get a sense of metrics of where the learning has evolved, so that would be one way to do it. The other is to also do a type of 360 assessment and do it again. So, to see if there has been some growth and the needle moving in a positive direction from even peer assessments and assessment from supervisors. I think that really also helps to do something like that.

**Researcher (Question):** Our final question. Would you measure success differently for an online curriculum?

**Interviewee (Answer):** Yes. Yes, I would. Because I think the learning environment is different. It’s very hard, I think, with online platforms to create a robust network of individuals. So if it’s a face-to-face cohort leadership development program, one of the secondary benefits of something like that always happens to be the informal learning that comes from the network itself, and then the long-term impact of that network that is developed a face-to-face cohort. You can measure that. But that probably would not be a value of an online platform; that sort of gets diluted. So that’s one of the disadvantages. But that’s also what are the differences in terms of how to measure that. So, that I don’t have any experience with online leader development platforms, but because the environment itself is so different, I think it would be a different reason to think about how to measure that differently. Now I will say the biggest advantage, I think, of an online platform is to continue to the participants learning, over time. Because if they are already accustomed to that kind of learning, and it is so much easier to, once a program ends formally, to continue to provide resources online or modules to alumni of programs and
so forth—inexpensively and relatively efficiently than you would with a face-to-face kind of venue.

**Interviewee (Answer):** Back to the assessment strategy for the online platform, one idea would be to invest some resources right now before the online platform arrives in measuring the culture around leadership and peoples areas of knowledge there, and how they feel they’re learning about leadership and to what degree is that helping them in terms of their current learning, [their] informal learning about leadership. And once the platform is up and running him, do another snapshot a year later around the culture, so part of it is assessing individual learning, but the other part could be assessing the entire culture if the goal is to move, the environment to move, towards a more full leadership culture.

**Interview 2: Transcription**

**Researcher (Question):** If you were asked to consult a government agency in transitioning their leadership development program from face-to-face to a virtual environment, what recommendations would you offer?

**Interviewee (Answer):** Well, I’m sure you heard this from others, but context to me matters so much around leadership development. For whom, and what are their end goals for folks. Is it more managerial and supervision work? Or is it about helping people to do visioning and innovation work. So to me the “why” matters I guess in answering that question. I definitely see where you’re going about issues of scale and like how you could use technology to potentially deliver something similar to a much wider variety of audiences. So to me it’s a toss-up between personalization and scope. I am the fool who reinvents my syllabus every semester even though I taught the class ten times, do you
know what I mean, because you know curriculum is best delivered when you know who you’re trying to reach and what your goals are for them. That becomes harder when you are scaling something for large numbers of people, so to me that’s one of the pulls I would have as a consultant. I would have somebody wrestle with how much is meaningful to their situation or just capturing the most people through it as you can. And then there’s incentivizing of course as an issue if you do online delivery, and how you, and I mean that all forms of incentivizing, how do you motivate people even to take it seriously and not think of it as another to-do item, but something that could actually be a learning moment. And to me that’s always hard. One of the big things for me is that people don’t reflect and vacuum, you know, so if you’re asking people to do work if they are just put into an online community and not really getting responsiveness and meaningful dialogue, however that happens in a chat room. It could be asynchronous, whatever, if they are not getting that why would they bother to put out ideas or thoughts? That’s one of my things too. How you prime them and make sure that people have the motivation to sort of engage in thoughtful authentic dialogue around whatever the issue is.

**Researcher (Question):** If your organization was asked to produce an online leadership development course for a government agency, how would you approach that, meaning where would you start?

**Interviewee (Answer):** This is where I have such limited knowledge about all this but I think again this is where you have to start with, you know Stephen Covey said back in the day best start with the end in mind. But you really have to start with what are the deliverables and the achievables that people want and work backwards, you can’t start
with the platform. To me that is a big mistake to say “we are using blackboard now let’s make it work for us”. No, you really need to figure out what the goals are and then choose the platform and pedagogy to meet the outcomes or the desired outcomes. I think survey wherever people already know. Developmentally or professional skills. All that knowledge comes into play too so the outcome is followed by who are the learners. Followed up by one of their daily work demands and then sort of thinking about how the curriculum can best fit their needs. But in some ways the design part comes last to me.

**Researcher (Question):** How would you measure success when delivering a leadership development course?

**Interviewee (Answer):** I feel like, again, what is hard is that in my classes we work really hard to measure the process as well as the outcome, so to me the outcome part is clear. There are objectives from leadership knowledge tests, there are cases that have gradients of right to wrong… sort of responses that we can code that way. So to me what they learned how they can apply it is actually easy part. The hard part is keeping them engaged, how invested were they in the process, how much meaning is ascribed to the outcomes, and can they attach their meaning to their actual work, does theory inform practice, etc.

So, to me, part of that answer seems really clear, the other part I have no idea, or it’s less nebulous, or it’s also just committed to the platform. I give webinars now through WebEx and that kind of stuff and you can see, I don’t know if you’ve ever done that, but you can see what level of screen the participants have it in, so the one I did last two weeks ago maybe 300 participants, I could see that for a hundred and 50 of them my
screen was their primary screen, and then for the other half my screen was a second or third you know.

**Researcher (Question):** Would you measure success differently for an online leadership is on the curriculum as opposed to measuring success with face-to-face?

**Interviewee (Answer):** You know it’s interesting, in my mind, but economies of scale still keep creeping back up for online delivery, but gosh it’s got to be sort of more affordable, I would never think about cost per, you know, sort of evaluating success in terms of cost is certainly there for online. I would put cost measures for some reason, because you can reach so many, so I think that’s one measure I would use differently online. I think again interpersonal, and intrapersonal become harder to gauge as far as those sorts of outcomes, I think it’s easier to be performative online and it’s easier to check the box and not sort gauge the authenticity of the person. Undergoing the learning, so you can have a face-to-face type of situations that would be harder to gauge online.

**Interview 3: Transcription**

**Researcher (Question):** If you were asked to consult a government agency in transitioning their leadership development program from face-to-face to a virtual environment, what recommendations would you offer?

**Interviewee (Answer):** I would not actually recommend that kind of change. What I would recommend is that they consider a blend of the two. I have quite a bit of experience with blended learning, and I’ve been teaching in a combination of online and face-to-face for, well, ever since 1996, so I’m coming on my 19th year doing that. So I have a lot of experience. And I also, while I’m not completely up-to-date with the literature cause I’ve been an administrator for a couple of years, I was completely up-to-
date with the research until a few years ago, and there’s a lot of research that indicates that while there’s tremendous value to doing this kind of work in the online environment, the quality of it is really seriously undermined if there is no face-to-face. Especially at the beginning if there’s a face-to-face. So I would probably, for example, I wouldn’t sign a contract to do purely online. I would be very willing to work with people to talk about how some parts of it could be transformed to the online environment but I would have pretty serious reservations about it being entirely online

**Researcher (Question):** If your organization was asked to produce an online leadership development course for a government agency, how would you approach that, meaning where would you start?

**Interviewee (Answer):** Well, I think I did answer this. I again would want them to consider a blended approach.

**Researcher (Question):** How would you measure success when delivering a leadership development course?

**Interviewee (Answer):** For me, that would depend very much on, well that would be tailored to the organization I was working with, what the purpose was, what kind of leaders, how much time and money was spent, at what stage in peoples career, and what level experience they were when they entered the program. I don’t think there is one way to measure leadership development.

**Researcher (Question):** Would you measure success differently for an online leadership is on the curriculum as opposed to measuring success with face-to-face?

**Interviewee (Answer):** Certainly in some ways it would have to be different yes. Some of it would not be that different, in that I assume at least one component of measuring
success would involve writing, and that could probably be measured in a similar way, but for me leadership building would require a fairly substantial experiential component. And how that would be measured dependent on the variables that I mentioned.
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<th>Interviewee</th>
<th>Notes from IC workforce interviews</th>
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<tr>
<td>Interviewee 4</td>
<td>For me I like speaker series, talks, discussions, and learning from others' perspectives and their challenges. Something with the speaker series would be helpful too. Something like a Ted Talk but on leadership, I think the training should be topic-based where we could learn from experiences and it should be geared towards the role of the audience.</td>
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<td>Interviewee 5</td>
<td>I think it is a combination of career enhancement and now days it is sort of considered mandatory whether this is spoken or unspoken. In my career I've sort of defaulted to leadership positions, and I need a new environment to improve my skills. I'm more comfortable with the risks associated with a training environment and simulation.</td>
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<td>Interviewee 6</td>
<td>Money to better myself and gain insight into dealing with diverse personalities.</td>
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<td>Interviewee 7</td>
<td>Really it's the potential to be better, and increase my leadership skills. I also like the opportunity to do the MBTI and other personality assessments. I also like learning about opportunities to influence others both above and below my pay grade. Experience diversity and networking is also a motivator. It's good to be around people who are going through the same situations, interact long term.</td>
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<td>Interviewee 8</td>
<td>Even at my age courses evolve and are different. Technology is different, and a lot of research is new. And although I have taken leadership development opportunities throughout my career, there is reaffirmation and validation of values each time. And each time I remind myself that the people side of things is still important and the soft skills too. It's also important to network and mentor others, and view others in different leadership development stages.</td>
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<td>Interviewee 9</td>
<td>Notes from IC workforce interviews</td>
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| Interviewee 10 | self understanding is huge. Strengths, weaknesses, how to address challenges in neutral environment. It's could have peers and mentors as a sounding board. Research interests me, and learning new ways to understand myself is important. 

**Notes from IC workforce interviews**

I want to see interactive tutorials for general topics, something on scenarios and decision making. It would need to be interactive and clear ways to improve. I would also really like to see some sort of assessment or measurement. Something like MBTI or other assessment that really focuses on understanding yourself and self-reflection.

The MBTI, and other ways to help hone yourself. Some sort of team or role-playing activities that have scenarios based decision making. I would also want to see how others would handle the same situation and would also want to see some horror stories of leaders participating for both their experiences and help, but also so they could talk about what they expect of leaders for advancement purposes.

Some pressure materials, whether it be books, articles, assessments – just something to get the gears going for the course.

I would like to see some sort of pre and post assessment. A pre-assessment to gauge whether I gathered the larger topics. Maybe a post assessment that assesses my grasp of the topics. Also, some sort of short assessment would be great.

There would need to be some personal sense of accomplishment in knowing how you are doing, being better equipped to handle difficult scenarios. It's sort of qualitative rather than quantitative. Success would need to be assessed to me - not just my knowledge of some material. Completion doesn't mean success. Did I expand my own skillset?

I would want to practice my skills — not just read something or observe. I would want to look back and see real world applicability. I would want to apply to the level of leadership I am in or pursuing.

I would want to be geared toward my work role and the immediate next steps in my career. I'd like some training that would apply to more senior roles. Not in my career I won't have as much leadership training to do.

I would want to have bettered myself. As an intern, I would like simulations in the online environment.

Pre and post tests that identify areas for improvement. Also, how to work on feedback. I want to know how to progress based on these assessments. Feedback would be important, with the opportunity to reflect on what I've learned over time.

the enthusiasm of the participants, personal learning of oneself, feedback without judgment, and a clear path to take and apply lessons learned.

pre and post of violations would be a good indicator. Did I learn something new? Was a truth affirmed?
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