ABSTRACT

Title of dissertation: THE RELATIONSHIP OF SELF-PERCEIVED
             LEADERSHIP STYLE AND ACCULTURATION
             OF LATINAS IN THE U.S. ARMY.

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The purpose of this research study was to examine the relationship of self-perceived leadership, acculturation and individualistic/collectivistic behaviors in Latino women leaders. Using a canonical correlational design, the study aimed at investigating how acculturation and individualistic/collectivistic behaviors relate to leadership of 524 Latina U.S. Army active duty officers with a participation rate of 72%. The study used a quantitative, descriptive, and exploratory research approach to answer the following research questions: What are Latino women's self-perceptions of their leadership style? How does acculturation relate to leadership? What is the relationship between acculturation and Latino women's self-perceptions of their leadership style? What is the relationship of individualism/collectivism on the relationship between leadership and acculturation? How does individualism and collectivism relate to Latino women's self-perceptions of their leadership style?

Correlational and t-test analyses were performed to compare the study's findings with those reported in previous research based on samples drawn from the

MLQ. Correlation coefficients were computed to examine the relationship among demographic, leadership, acculturation, and individualism/collectivism variables. A canonical correlation was used to investigate the relationship between the set of variables of leadership and acculturation, acculturation and individualism/collectivism.

Results indicated that the factor structure of the scales previously reported from Anglo cultures did fit the data from the Latina sample. These Latina officers, however, reported higher levels of transformational and lower levels of transactional leadership than normative samples. Significant canonical correlations were found among the variables under investigation that showed two types of canonical roots: *Latina Collectivist and Active Transformational Leadership* and *Marginalized Individualistic and Passive Transactional Leadership*. The Latina Collectivist and Active Transformational Leadership root was composed of the following variables: *Latino Orientation, Horizontal and Vertical Collectivism, Idealized Influence (Behavior), Inspirational Motivation, Contingent Reward, Idealized Consideration, Intellectual Stimulation, Idealized Influence (Attributed), Laissez-Faire Leadership, and Management-by-Exception (Active)*. The Marginalized Individualistic and Passive Transactional Leadership root was composed of the following variables: *Anglo Marginality, Latino Marginality, Latino/Hispanic Marginality, Horizontal and Vertical Individualism, Laissez-Faire Leadership, Intellectual Stimulation, Management-by-Exception (Active) and Management-by-Exception (Passive)*. Findings confirm Bass and Avolio (2004) contention that collectivist cultures nurture transformational leadership. Implications, limitations, and directions for future research were discussed.

THE RELATIONSHIP OF SELF-PERCEIVED LEADERSHIP STYLE AND
ACCULTTURATION OF LATINAS IN THE U.S. ARMY

By

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Dedication

This dissertation is dedicated to

Edna Mora Szymanski, Ph.D.

Victory is not achieved by conceited souls,
but by humble wisdom of simple strength.

Unnoticed, unassuming, and unsung…

Giving generously and with enthusiasm of
the knowledge that quenches the thirst.

Developing others to their best of the fullest of their potential,
Creating opportunities despite the odds,
Having the vision to see beyond the unseen,
Just to connect mind, body, and soul.

An architect and engineer,
Of vision and honor, seeking balance by
Transforming imperfection to excellence, therein transformational.

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Chapter I: Introduction

Introduction of the Study

Research on leadership and women has expanded and developed in the last three decades, but it still does not address Latino women's approaches to leadership (Bordas, 2001; Gorena, 1993; Reza, 1995) nor examine the relationship of leadership, acculturation, and individualism/collectivism styles of Latino women leaders. Research on Latinos/as is limited and almost nonexistent (Abalos, 1998; Acosta-Belén, 1979; Burgos-Sasscer, 1990; MALDEF, 1990a, 1990b; Meier & Steward, 1991; Mirande & Enríquez, 1979; Trueba, 1999; Zambrana & Zoppi, 2002). Further, research on Latino women is restricted to larger Latino/Hispanic population subgroups (e.g., Cubans, Mexicans, and Puerto Ricans) (Portes & Rumbaut, 1996; Rein, 2001; Reza, 1995; C. Rodríguez, 2000; The World Bank, 2003; U.S. Census Bureau, 2002b; Zambrana, Dorrington, & Alonzo Bell, 1997). Thus, literature on Latino women is inadequate, particularly for Latino women in the military.

This study addresses a specific research problem in examining: What is the relationship of leadership style to acculturation and individualism/collectivism of Latinas. Specifically, this study is designed to investigate the self-perceptions of Latinas in positions of leadership in the U.S. Army, serving in active duty. It attempts to develop a framework for understanding Latina leadership within the concepts of leadership, acculturation, and individualism/collectivism.

Further, it explores the relationship between acculturation and individualism-collectivism with leadership styles of Latino women with the purpose of:

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(1) understanding how Latino women perceive their leadership style; (2) exploring the

relationship of acculturation to Latina self-perceived leadership styles; (3) examining

the role of individualism-collectivism on Latino women self-perceived leadership

styles; and (4) adding to the body of literature on leadership within the constructs of

leadership and acculturation embedded in Latino ethnic culture, self-identity, and it's

influence (relationship) with individualism-collectivism styles in U.S. culture.

In order to provide a clear background for this study, the following sections

address: (a) terminology, (b) research problem and significance, (c) conceptual

framework, (d) overview of the literature review, and (e) research problem and

questions.

Terminology

The terms Hispanic and Latino/a are used interchangeably throughout this

study. Hispanic is a governmental designation identifying the mixture of Latino sub-

groups within their own nationality (e.g., Argentinean, Bolivian, Chilean, Costa

Rican, Colombian, Cuban, Dominican, Ecuadorian, Honduran, Guatemalan, Mexican,

Panamanian, Paraguayan, Peruvian, Puerto Rican, Salvadorian, Nicaraguan,

Uruguayan, and Venezuelan, of different origins and races) (Arredondo, 1991). Since

most of the literature on Latinas uses the term Hispanic in accordance with the

governmental designation, the term Hispanic is sometimes used throughout this

research study when referencing existing literature.

I use the term Latina to identify Hispanic women. Latina is a term used to

identify Latino women whereas the term Latino identifies both men and women.

Additionally, the term Latino can be used to identify the male gender, (e.g., Latino, a man who is of Latino/Hispanic ethnicity). Further, Latinos/as are plural forms specifying the gender of both men and women. The Spanish terms, used by a specific ethnic-sub-group, will be used to identify Latino sub-groups (e.g., Boricua, Chicana, Cubana, Dominicana, Habanera, Mejicana, Taína, Puertorra, Venezolana) (E. García, 2001; J. García, 2003).

Research Problem and Significance

The research problem of this study is complex. Specifically, the research problem is: How is acculturation related to leadership of Latinas? Cultural identity adds another layer of complexity to the understanding of how culture influence leadership styles of ethnic groups who are predominantly non-Anglo, but living in the United States. Thus, research on upward mobility of minority leaders suggests that certain ethnic minority heritages (e.g., African, Latino/Hispanic, Asian, Native…) may lead differently, however, culturally oriented explanations of leadership values, attitudes, traits, or behaviors are limited (Arredondo, 1991; Chemers & Murphy, 1995; Hofstede, 2001).

The research problem is important because it addresses the following listed empirical facts based on past and current scholarly research. Although Latinos are the largest minority group, Latinos are underrepresented socially, economically and educationally (U.S. Census, 2002). Statistically and demographically, Latinas are disproportionally underrepresented in positions of leadership (Indvik, 2004; Meier &

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Steward, 1991). However, military Latino women of different Latino/Hispanic sub-groups have found ways to enter in leadership positions regardless of their age, gender, ethnicity/race, and socioeconomic background (Army Research Institute for Behavioral and Social Sciences [ARI], 2004; Women's Research and Education Institute [WREI], 2003). Therefore, understanding the phenomena of leadership and acculturation will extend the current literature with information about the roles that culture and identity play in leadership, and how they affect the leadership success of Latino women in the United States.

Past research has indicated that men and women differ in management and leadership positions (Bass, 1981; Gilligan, 1982). Although this research focus on gender differences of leadership, it does not address Latino women (Acosta-Belén, 1979; Bonilla-Santiago, 1992; Bordas, 2001; H. Garza, 2001; Y. Garza, 1996; M. J. Gómez, 1996). Little empirical research has been done on Latino leadership (H. Garza, 2001). Therefore, there is hardly any research on leadership and Latino women (Bonilla-Santiago, 1992; Bordas, 2001).

Furthermore, the literature shows that there is no research in acculturation and leadership. Research on acculturation within the premises of culture (e.g., dominant and non-dominant), has explored dimensions of processes within the individuals' psychological functioning (i.e., language, cognition, personality, identity, attitude, stress…) conditioned by the environment (i.e., adapt, assimilate, integrate, reject) in a new culture (Banks, 2001; LaFromboise, Coleman, & Gerton, 1993; Rosaldo & Flores, 1997; Ryder, Alden, & Paulhaus, 2000). There are numerous typologies and

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models that frame acculturation (LaFromboise et al., 1993) within the notion of identity influenced by behavior and cultural competence (Bandura, 1986; Berry, 1980).

This study addresses the fundamental ideal of leadership within the constructs of acculturation and individualism/collectivism. It explores the relationships of these constructs to self-perceived leadership styles of Latino women. Specifically, the study is important because such research has not been done. Thus, the study of leadership and acculturation of Latino women will contribute significantly to our understanding of how Latino women practice leadership. This research allows us to gain an understanding of the supports that Latino women need to access opportunities to develop leadership capabilities. Furthermore, this research has the potential to make a substantial contribution to leadership, acculturation, and individualism/collectivism research and theory. Finally, the present study offers the opportunity to fill the gap between research studies on leadership and theories of acculturation, for Latinas in the military.

Conceptual Framework

The study examined the relationship of self-perceived leadership and acculturation in a sample of Latinas. It explored the relationships among leadership and acculturation, in relation to culture and Latino culture, identity and acculturation, culture and organizational culture, and leadership as perceived by Latino women in their leadership experiences. Below is the conceptual framework illustration, additional information is presented in Chapters II and III. Latino women leaders' self-perceived experiences are depicted through self-identification of culture (i.e., Latino culture, Anglo culture) and self-identity; examined through different types of leadership: transactional, transformational, and laissez-faire leadership (Bass & Avolio, 2000).

Acculturation, at the individual level, is referred to as a psychological acculturation of attitudes, behaviors, beliefs, and values (Suh, 2002). The acculturation processes (e.g., assimilation, integration, marginalization, separation) include those phenomena which result when an individual/s having different cultures come into a subsequent contact (Cuéllar, Arnold, & Maldonado, 1995). Subsequently, individual perception of self-acculturation level imposes individual identity with regard to acculturation processes (i.e., Latino orientation or Anglo Orientation, and biculturalism). Consequently, "the acculturation phenomena impact individuals at all levels of functioning including behavioral, affective, and cognitive" (Cuéllar et al., p. 281).

Further, acculturation influences individuals' types of behavior, including language preferences, development, and cognition, as well as customs, food, cultural expressions (dance, music, signing), emotions, meanings, and beliefs/values (Cuéllar et. al.). Illustration 1.1 is presented as a visual framework for the study.

Leadership, at the individual level refers to the meaning of leadership within the concept of how one leads. Through leadership styles, the individual attributes (e.g., cognitive abilities), competencies (e.g., skills, talents), and leadership outcomes (e.g., performance, results) (Mumford, Zaccaro, Harding, Oweb Jacobs, & Fleishman, 2000; Northouse, 2004) are addressed by the leadership possibilities embedded in a particular style (e.g., transactional, transformational, laissez-faire). The transactional styles refers to exchanges or transactions between the leaders and the followers as how the leader influences the subordinates (e.g., contingent reward/constructive transactions and management by exception active/passive/corrective transactions) (Bass & Avolio, 1994a, 1994b). The transformational style refers to idealized attributes and behaviors, inspirational motivation, intellectual stimulation, and individualized consideration (Bass & Avolio, 2002). The laissez-faire style represents the absence of leadership or hands-off, management by exception (passive) or laissez-faire (avoidant) (Northouse, 2004).

Illustration 1.1

Conceptual Framework of the Research: Leadership, Acculturation, and

Individualism/Collectivism

LATINO WOMEN IN LEADERSHIP
SELF-PERCEIVED IDENTITY AND EXPERIENCES

Leadership Behaviors

Transformational Leadership

Transactional Leadership

Laissez-Faire Leadership

Acculturation Orientation

Latino Orientation

Anglo Orientation

Marginality Orientations
(Latino, Anglo, Latino/Hispanic)

Individualism and Collectivism Identity

Horizontal = Equality   Vertical = Hierarchy

Competition

Emotional distance from in-groups

Family integrity

Hedonism

Interdependence

Self-reliance

Sociability

Finally, individualism and collectivism style refers to the individuals' set of

values, behaviors, and attitudes (e.g., construct of cultural competition) prescribed by

the environment (e.g., culture: ethnic identity, organizational, etc.) (Hofstede, 2001;

Hurtado, Gurin, & Peng, 1994; Spradley, 1972). Triandis and Gelfand (1998) conceived

the definition of self (Freud, 1938; Maslow, 1968) in relation to personal goals or

collective aspects associated to individual identity (e.g., set behaviors, values, and

customs) (Muchinsky, 1997; Rudmin, 2003; Spring, 2001; Tajfel, 1978; Tharenou,

2001; Yinger, 1994).

  The conceptual framework of this study helped in examining the relationship

of leadership, acculturation, and individualism-collectivism styles in a sample of

Latina military leaders. Further details are provided in Chapter III of this study.

Definitions of Variables

In the current study, three constructs were used to measure leadership, acculturation, and individualism-collectivism in order to explore its relationship within the leaders' self-perception dimension. The definitions of each variable were according to theoretical definitions of the construct that the developers of the scales provided.

Leadership construct was defined by Bass and Avolio (1999, 2004). In the Full-Range Leadership Model, leadership is conceived as a continuum of activities ranging from transformational to transactional to non-leadership or laissez-faire. This model was used to understand the self-perceived leadership behaviors in relation to the range of leadership activities using the Multifactor Leadership Questionnaire, Self-Rated, Level 0.

Acculturation construct was defined by Cuéllar et al. (1995). The ARSMA II refers to acculturation rating scale that measures the cultural orientation toward Anglo and Latino culture. Acculturation orientation is defined by the leaders' cultural preference, familiarity, and behavioral self-assessment of ethnic identity, which "impact individuals at all levels of functioning, including behavioral, affective, and cognitive" (Cuéllar et al., 1995, p. 281). Although various models of acculturation have been proposed to outline acculturation level (e.g., Integration, Assimilation, Separation, Biculturization), in this study, acculturation orientation is used to explore and to assess acculturation factors by measuring the individuals cultural orientation towards language usage and preference, ethnic identity and classification, cultural heritage and ethnic behaviors, and ethnic integration. The assessment of these factors is defined as acculturation orientation by Cuéllar et al. However, it is important to recognize that

Latino acculturation experience in the U.S. is complex, and the conceptualization of

acculturation orientation offers only a 'snap shot' of the individual's cultural being.

I further examined acculturation by exploring individualism and collectivism as

constructs of culture within the acculturation dimension.

Individualism-collectivism (I-C) construct is defined by Triandis and Gelfand

(1998), which provides us with another layer of culture and acculturation. The I-C Scale

measures individualism and collectivism of horizontal and vertical dimensions. It

assesses individual identity, preference, and orientation. Horizontal tendencies refer to

equality and vertical tendencies refer to hierarchy. Individualism refers to self-reliance,

competition, emotional distance from in-groups, and hedonism. Collectivism refers to

interdependence, family integrity, and sociability.

Table 1.1

Leadership, Acculturation, and Individualism/Collectivism Variables

Construct Variable	Definition
Leadership	**Bass and Avolio (1999, p. 36).**
Transformational	Leadership behaviors associated with transformational styles.
Transactional	Leadership behaviors associated with transactional styles.
Laissez-Faire	Absence of leadership.
Acculturation	**Cuéllar et al. (1995, p. 275).**
Anglo Orientation	Cultural orientation or preference toward Anglo culture.
Latino Orientation	Cultural orientation or preference toward Latino culture.
Marginality Orientation	Lack or conflict of cultural preference toward Anglo or Latino cultures.
Individualism-Collectivism	**Triandis (1995, p. 47).**
Horizontal Collectivism	Orientation or preference toward being cooperative.
Vertical Collectivism	Orientation or preference toward being dutiful.
Horizontal Individualism	Orientation or preference toward being unique.
Vertical Individualism	Orientation or preference toward being achievement oriented.

A detail of these instruments and definitions of each construct is provided in Chapter II.

Overview of the Literature Review

The study was informed by the literature in seven major areas of the most salient research related to the problem: (a) Latino population demographics and status in the United States; (b) culture and Latino culture, (c) identity and acculturation theories and arguments; (d) organizational culture theories; and (e) leadership theories and assumptions; (f) U.S. Army leadership theory and practice, and (g) leadership and acculturation instruments. The literature examines leadership and culture and the dynamics of identity and acculturation processes of Latino-Anglo cultures in the United States, particularly the theoretical assumptions of leadership in relation to self-perceived leadership-culture-acculturation levels. The review of the literature is presented in Chapter II, however, below I present an overview of the literature review.

Over the past centuries, the Latino population increased to become the largest minority group (U.S. Census Bureau, 2002b). The Latino population in the U.S. is a younger heterogeneous population representing considerable variations of age, race, gender, and ethnic identity within Latino-sub-ethnic group, religion, language, socio-economic status, education, and residency status (Llagas & Snyder, 2003; National Council of La Raza, 1998; Rein, 2001; U.S. Census Bureau, 2002b; U.S. Department of Education, 2003). Despite the population growth, Latinos are socially, economically, and educationally underrepresented (Martínez, 2002; Meier & Steward, 1991; National Council of La Raza, 1998). Consequently, based on demographic and statistical trends, the status and progress of Latinos in the U.S.

projects a disadvantaged, underprivileged, and neglected population (National Council of La Raza, 2001), particularly overrepresented in poverty with lower percentages of earnings, high rates of unemployment, and lower rates of progression in labor force/occupations with significant occupational differences among Latino sub-groups, which further impact their democratic citizenship and full participation in U.S. (Rein, 2001; C. Rodríguez, 2000; R. Rodríguez, 1998; U.S. Department of Education, 2003; Wirt et al., 2003).

Research on culture and Latino culture has focused and evolved across academic fields, primarily, in aspects of characteristics and disparities across Latino sub-groups (Trueba, 1999). Most of the literature shows general Latino culture characteristics, such as retention of ethnic identity, tendency towards familiarism, and Spanish language maintenance (Hidalgo, 1998; Moya, 2002). Current literature addresses sociocultural ethnic identity/collective group identification and classification within the umbrella of Latinos/Hispanics, specifically in census categorical label (U.S. Census, Hispanic), social and psychological reality (minority ethnic status), and ethnic movements (Latinidad, Latinismo, Hispano-Americanos) as well as ethnic pride (orgullo) (Pérez-Torres, 2000; Rosaldo & Flores, 1997). Specifically, literature on Latino culture aims at understanding the value of Latino heritage within the context of cultural differences, identity (personal), and acculturation to mainstream culture (Sabogal, Marín, Otero-Sabogal, Marín, & Pérez-Stable, 1987; Sandoval & De La Roza, 1986; Santiago-Rivera, Arredondo, & Gallardo-Cooper, 2002).

Research on identity and acculturation theories/arguments presents a multidisciplinary discourse with varied and inconsistent terminologies, adapted to each academic field of study (Rudmin, 2003). Consequently, there are multiple versions of theoretical approaches to identity and acculturation that address culture, ethnicity, and identity (LaFromboise et al., 1993). However, the literature on acculturation does not address leadership styles, particularly of Latino women.

Research on leadership has focused on the leader's sources of power, commitment, and compliance, and their development (Muchinsky, 1997). However, little is know on how minorities lead, specifically how Latino women lead (Bonilla-Santiago, 1992). Literature on Latino and Latina leadership is scarce and does not address the contributions of Latino women, particularly in education, business, and military arenas (Bordas, 2001; Chahin, 1993; González, 2000; Gorena, 1996; Haro, 1983; Martínez, 2002; R. Padilla & Chávez Chávez, 1995). Consequently, there is a need for research on the leadership of Latinas (Flores Niemann, Armitage, Hart, & Weathermon, 2002).

Research Problem and Questions

The study tackled one small part of the issue of Latina leadership in order to contribute to filling the gap in the literature, and provide an understanding of Latino women's approach to leadership. Additionally, this study aimed at discovering how Latino culture and acculturation into the Anglo culture may influence leadership, in order to better understand leadership development and organizational diversity in business, education, industry, and the Armed Forces, specifically the United States Army.

The following research questions served as a general guide to facilitate the exploration of the research problem and questions as a general guide to facilitate the exploration of the research problem, which arose from my conceptual framework that overarches leadership theories, culture, and identity.

1. What are Latino women's self-perceptions of their leadership style?

2. How does acculturation relate to leadership? Specifically, what is the relationship between acculturation and Latino women's self-perceptions of their leadership style?

3. What is the influence of individualism/collectivism on the relationship between leadership and acculturation? Specifically, how do individualism and collectivism relate to Latino women's self-perceptions of their leadership style?

Chapter II: Literature Review

Introduction to the Review of the Literature

A review of the literature pertaining to Latino women leadership and acculturation is presented in this chapter. The review is presented in seven main sections: (a) Latino population demographics and status in the United States, (b) culture and Latino culture, (c) identity and acculturation theories and arguments, (d) organizational culture theories, (e) leadership theories and assumptions, (f) U.S. Army leadership theory and practice, and (g) leadership and acculturation instruments. These seven sections examine leadership and culture within the dynamics of identity and acculturation processes of Latino-Anglo cultures in the United States. Specifically, they highlight the theoretical assumptions of leadership in relation to organization and culture, particularly on Latino culture in the United States.

The examination of the literature on leadership and acculturation guides the research study. Currently, Latinos are the fastest growing minority group in the United States. Thus, it is important that we understand factors associated with their leadership. The purpose of this review of the literature is to address the focal point of leadership and acculturation theories, assumptions, and research gaps that fail to address the relationship between leadership and acculturation, particularly for Latinas.

Latino Population Demographics and Status in the United States

Demographic statistics and the literature suggest a complex phenomenon for the Latino population in the U.S. Because this phenomenon is associated with multiple factors of demographic, socio-economic, educational, cultural, and leadership concerns, the following will be addressed: (a) overview of Latino population statistics; (b) state of Latinos in the U.S.; (c) context for the social status of Latinos in the U.S. economy; (d) synopsis of the Latino economic, social, and educational status; (e) summary of the Latino educational participation and attainment; and (f) rundown of the condition of Latinos and their impact on the national economy.

Overview of Latino Population Statistics

Population size and projections (fertility). Latinos are the largest minority group with a significant heterogeneous ethnic diversity in the United States. Latinos represent 35 million (13 percent) of the total U.S. population (U.S. Census Bureau, 2000a). According to the 2000 U.S. census, Latino women (ages 15 to 44 of any race) had significantly higher fertility rates than the general population. In 1997, the birth rate of Latino women (102.8 per 1,000) was much higher than the rate of non-Latino women (60.1 per 1,000). The U.S. Census Bureau (2000a) predicted that the Latino population could increase to 52.7 million by 2020 (16.3 percent of the nation's total population), and 96.5 million by 2050 (24.5 percent of the nation's total population).

The Latino population in the U.S. is a younger population with over one-third (35.5 percent) of all Latinos being less than 18 years old, compared to 23.8 percent of

the non-Latino White population. Only 5 percent of Latinos were 65 years of age and over, compared to 14 percent of non-Latino Whites (Rein, 2000; U.S. Census Bureau, 2000a). In March 2000, the median age for Latinos was 26.6 years, compared to 38.6 years for the White non-Latino population and 30.6 years for the Black population (Llagas & Snyder, 2003; U.S. Census Bureau, 2000a). Within the Latino sub-groups there is a considerable variation in age. For example, the percentage of Latinos, 18 years old or younger, ranged from 38.6 percent for Mexican Americans to 21.2 percent for Cubans (U.S. Census Bureau, 2000a).

Latino ethnic sub-groups. Latinos are not a homogenous ethnic group. They represent 43 Spanish heritage-speaking countries with a population of appropriately 358 million speakers, placing Spanish as the 4th most frequently spoken language world-wide (The World Bank, 2003). Further, Latinos may speak a variety of dialects, which are derived from Spanish, (i.e. Castilian, Catalán, American Spanish as well as a regional language derived from indigenous natives and English). In addition, Latinos may be of any race. They represent a mixture of several ethnic backgrounds, including European, American Indian, and African (González, 2000; Larrain, 2000).

Consequently, Latinos have diversity even within their own ethnic identity and heritage (i.e., Spanish descent). Nearly 58.5 percent of all Latinos in the U.S. are Mexican American; 9.6 percent are Puerto Rican; 4.8 percent are Central American; 3.8 percent are South American; 3.5 percent are Cuban American; 2.2 percent are

Dominican; 0.3 percent are Spaniard; and 17.3 percent are from other sub-groups of the Latino population in the U.S. (U.S. Census Bureau, 2000a).

Geographic distribution. Geographically, the majority of Latinos live in the southwest of the United States. Proportionally to the total population, the highest percentages of Latinos in 1998 were in the following states: New Mexico (40%), California (31%), Texas (30%), Arizona (22%), Colorado (15%); Nevada (16%) and Florida (15%) (U.S. Census Bureau, 2000a).

According to the U.S. census (2000) approximately 90 percent of the Latinos live in urban areas, particularly in Los Angeles, New York City, Miami, San Francisco, Chicago, and other cities in the southwest. Los Angeles, for example, is home to many Latino sub-groups, particularly Mexican, as well as small Cuban, Guatemalan, and Puerto Rican communities. About a third of all Puerto Ricans living on the mainland live in New York City. However the city is also home to Colombians, Cubans, Dominicans, and Ecuadorians. Chicago has a large Latino population representation of Mexican, Puerto Rican, Cuban and Colombian. Miami and many counties in the state of Florida have the largest Cuban population as well as an increasing Nicaraguan immigrant population. Most recently, Latino immigrants have settled in smaller cities, such as Boise, Idaho, and Yakima, Washington. Further, a small number of Latinos settled in geographical areas that are non-Latino settlements (Rein, 2001). Latinos have a diverse cultural background, particularly derived and characterized by their nationality and identity, (e.g., culture, traditions)

(Novas, 1994). According to the U.S. census (2000) the three largest groups of Latinos living in the U.S. are Mexican Americans, Puerto Ricans, and Cubans.

State of Latinos in the U.S.

Despite the growth in population and their diversity, Latinos are socially, economically, and educationally underrepresented. Statistical data on the socioeconomic status of Latinos reveal that Latinos are socially, economically, and educationally divided. The data show that subgroups of Latinos differ on levels of socio-economic status (High, Middle, and Low classes), and educational achievement (Elementary, Middle, High, and College attainment). Also, they have a diverse and complex immigration/migration status depending on the country of origin and the country's relationship with the U.S. In addition, there are racial and ethnic differences among the sub-ethnic groups (Black, White, and indigenous) (González, 2000).

According to demographic data and review of the literature, Latinos are overrepresented in poverty. The poverty rate of Latinos in 2000 matches the record lows reached in the 1970s. A total of 7.2 million Hispanics were poor in 2000, not statistically different from 1999. Approximately, 33.6 percent of Latino children live in poverty, compared to 10 percent of White children. In 2001, the number of poor Latinos rose to 8.0 million, an increase from 7.8 million in 2000 (U.S. Census Bureau, 2001). Consequently, about one in five (21.4%) Latinos is poor, and while Hispanic children represent 17.7% of all children in this nation, they constitute 30.4% of all children living in poverty (National Council of La Raza [NCLR], 2003). The

issues in this section address the overall economic status of Latinos in the U.S. economy. Information for understanding the general economic environment in which Latinos live as members of our community is provided on the following topics: (a) earnings, (b) unemployment, and (c) labor force and occupations.

Earnings. There is a gap in median earnings between Latinos and non-Latinos at all levels of educational attainment (U.S. Department of Education, 2003). This earning gap is lower for those Latinos (male and female) with at least a bachelor's degree. According to the National Center of Educational Statistics (2003) in 2000, the annual earnings of males ages 25-34 with a bachelor's degree or higher was $39,389 as compared to their female counterparts whose earnings were $23,566. The data suggest that these variations in earnings overlap one another at different educational levels (Wirt et al., 2003).

In 2000, the median earnings of Latino men age 25 and older were about $13,000 less than for White men. Overall, Latino males received the lowest income ($23,425) whereas Whites ($36,668) and Blacks ($28,167) received higher earnings. With a high school diploma, the median earning for Whites ($31,295) and Blacks ($25,466) was higher than for Latinos ($24,973). With some college but no degree, the median earning for Whites ($36,051) and Blacks ($30,915) was higher than for Latinos ($30,591). With an associate degree, the median earnings for Whites ($40,270) were higher than for Latinos ($35,100) and Blacks ($30,583). For a bachelor's degree or higher, the median earnings for Whites ($55,906) and Blacks ($42,591) were higher than for Latinos ($42,518) (Wirt et al., 2003). Thus, among all

men, Latino men earned less than White and Black counterparts, despite their educational attainment.

In 2000, the median earnings of Latino women age 25 and older were about $6,500 less than that of White women. Overall, Latino women received the lowest income ($16,601) whereas Whites ($23,887) and Blacks ($22,028) received higher earnings. With a high school diploma, the median earning for Whites ($18,627) and Blacks ($17,822) was higher than for Latinas ($16,757). With some college but no degree, the median earning for Blacks ($22,242) and Whites ($22,960) was higher than for Latinas ($21,860). With an associate degree, the median earnings for Whites ($25,480) were higher than for Blacks ($25,411) and Latinas ($22,347). For a bachelor's degree or higher, the median earnings for Whites ($35,472) and Blacks ($37,898) were higher than for Latinas ($32,035) (Llagas & Snyder, 2003; Wirt et al., 2003). We can conclude, therefore, that Latino women earned less despite their academic attainment.

Unemployment. From 1997 to 1999, Latino unemployment rates dropped from 13.8 percent (1997) to 11.8 percent (1999), with a two percent difference. About 11.8 percent of Latinos 16 years of age and over, at all education levels, were unemployed, 16.1 percent with less than a high school education, 10.2 percent with a high school education, 7.2 percent with some college education, 4.3 percent with an associate degree, and 4.1 percent with a bachelor's degree or higher (U.S. Department of Commerce, 1999a). In 1999, Puerto Ricans had the highest rate of unemployment at 8.2 percent whereas Cubans had the lowest rate of unemployment at 4.6 percent,

compared to Mexican Americans at 6.6 percent (U.S. Bureau of Labor and Statistics, 2000; U.S. Department of Commerce, 2000). Data on other Latino sub-groups were not available.

Labor force and occupations. According to U.S. Census 2000 data, 69.1 percent of all Latinos participate in the labor force in the United States. From the total labor force population in the U.S., Latinos (age 16 and over) represent 12.7 percent of the total civilian workforce. Statistical data on U.S. labor force type of occupation reveal that Latinos are less likely to hold managerial and professional positions in comparison to non-Latino/Hispanic Whites and Blacks (U.S. Bureau Labor and Statistics, 2000). The data showed that there is a smaller proportion of Latinos (men and women) employed in managerial/professional positions than White men and women (Llagas & Snyder, 2003). Latinos comprise 4.5 percent of officials and managers (5.1% males and 3.6% females), 5.7 percent of professionals (5% males and 6.8% females) and 3.9 percent of technicians (4.1% males and 3.7% females) (U.S. Equal Employment Opportunity Commission, 1998). However in the percentage of employment, Whites comprise of 12.6 percent of officials/managers, 17.8 percent of professionals, 6.5 percent of technicians, whereas Blacks comprise of 4.5 percent of officials/managers, 7.2 percent of professionals, and 4.9 percent of technicians (U.S. Equal Employment Opportunity Commission).

Consequently, Latinos are more likely to be employed in the lower-paying categories than in positions of management and administration. For example, in 1998, Latinos comprised 22.9 percent of operators, compared to 17.8 percent of Whites and

25.2 of Blacks; 20.4 percent of Laborers, compared to 7 percent of Whites and 15.1 percent of Blacks; 17.9 percent of service workers, compared to 6.2 percent of Whites and 17.8 percent of Blacks; 11.2 percent of craft workers, compared to 14.9 of Whites and 10.2 of Blacks; 14.4 percent of sales workers, compared to 10.1 percent of Whites and 9.3 percent of Blacks; and 5.4 percent of office and clerical workers, compared to 4.8 of Whites and 7 percent of Blacks (Rein, 2001; U.S. Equal Employment Opportunity Commission, 1998).

Latino women are also underrepresented in positions of management and administration, but are over represented in positions of manual labor. For example, in 1998, Latinas comprised 3.6 percent of managerial positions, compared to about 8.7 percent of White women and 3.8 percent of Black women; 6.8 percent of professionals, compared to 19.4 percent of White women and 8.6 percent of Black women; and 3.7 percent of technicians, compared to 6.2 percent of White women and 5.4 percent of Black women (U.S. Equal Employment Opportunity Commission, 1998).

Overall, Latinas are increasing in representation in lower-paying positions such as office and clerical workers (22.7%), compared to 25.4 percent of White women and 25.3 of Black women; as service workers (19.9%), compared to 11.0 percent of White women and 21.5 percent of Black women are employed as service workers; as sales workers (14.4%), compared to 14.6 percent of White women and 13.8 of Black women; as laborers (13.8), compared to 4.6 of White women and 7.6 of Black women; as operators (12.7%), compared to 8 percent of White women and 11.9

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of Black women; and as craft workers (2.4%), compared to 2.2 percent of White women and 2.0 percent of Black women (Rein, 2001). These figures illustrate the overrepresentation of minorities in manual and service labor-specific functions, specifically for both Latino men and women. In addition, the data suggest that Latino women's occupational employment is characterized by clerical and service worker positions (Rein).

Significant occupational differences exist among Latino sub-groups (Rein, 2001; U.S. Census Bureau, 2002). In 1999, about 27.3 percent of Cuban Americans, 19.4 percent of Puerto Ricans, 11.8 percent of Mexican Americans were employed in management and professional positions (U.S. Department of Commerce, 1999b; U.S. Equal Employment Opportunity Commission, 1998). Cubans were most likely to be in management and professional positions, whereas Mexicans (23.6%) were more likely to be working as operators, factory workers and laborers. About 31.4 percent of Puerto Ricans and 30.7 of Cubans worked in technical, sales and administrative support positions (Rein, 2001; Llagas & Snyder, 2003; Wirt et al., 2003). Data concerning other Latino sub-groups were not available.

Context for the Social Status of Latinos in the U.S. Economy

The context for the social status of Latinos in the U.S. economy is addressed through the following topics: (a) migration, immigration, residency, and naturalization for U.S. citizenship; (b) voting participation rates; (c) representation of appointed or elected officials; and (d) marital status, family and living arrangements.

Migration, immigration, residency and naturalization for U.S. citizenship. Unless born in the U.S or U.S. territory, born of a U.S. citizen, adopted by a U.S. citizen, Latinos may be classified as migrants or immigrants. Latino migrants are migratory workers, or the children or spouses of migratory workers, who relocate in order to obtain seasonal agricultural or fishing employment. The highest numbers of migrants in U.S. schools in 1998 were in California (208,739), Texas (115,043), Florida (51,839), Washington (31,057), and Oregon (25,243) (U.S. Census Bureau, 2000a). However, the highest numbers of migrants in U.S. schools for summer schools were California (104,737), Texas (40,173), Florida (14,519), Arizona (9,760) and Michigan (9,614) (U.S. Bureau of Labor and Statistics, 2000; U.S. Census Bureau, 2002a; U.S. Department of Education, 2001).

Latino immigrants are those who choose to come to the U.S. with the purpose of immigrating to the U.S. According to the White House Initiative on Hispanic Educational Excellence (2003) Mexican and Central American immigrants are less educated upon arrival in the U.S. than those from the Caribbean and South America. Foreign-born Latinos are those who are not born as U.S. citizens. According to the U.S. Census population survey in March 2000, 10.4 percent of the total population

was foreign-born. The proportion of the foreign-born population was much higher among Asians/Pacific Islanders (61.4 percent) than other minorities, Latinos (39.1%), Blacks (6.3%) and Whites non-Latinos (3.6%). Of the foreign-born population from Latin America, 86.2 percent were Latino, 11.4 were Black, and 2.9 were Black and Latino (U.S. Census Bureau, 2000a). Among foreign-born, the length of residence and citizenship status differs by race and ethnicity. According to the U.S. census (2000a), the median length of residence of those foreign-born was 14.4 years, and 37.4 percent were naturalized citizens. Of the foreign-born with residency and citizenship, Whites (non-Latinos) had the highest rates (21.2 median years of residency, and 50.3% naturalized), followed by Asian/Pacific Islanders with the second highest rates (13.6 years, and 45.7% naturalization). However, Latinos' foreign-born with residency and citizenship were the lowest rates (13.2 years, and 25.7% naturalization).

Voting participation rates. According to the Hispanic Leadership Institute (HLI) (1999) Latinos voting registration increased by 27.9 percent, and by 16.3% in the total number who actually voted from 1992 to 1996. However, Latino voting participation is lower than those of Whites and Blacks at all educational levels. Voting participation rates increased with educational achievement. For example, 51 percent of Latinos who had a bachelor's degree participated in voting, compared to Whites (77%) and Blacks (71%); 41 percent of Latinos with some college or an associate degree participated in voting, compared to Whites (64%), and Blacks (59%); 29 percent of Latinos with a high school diploma or a GED participated in

voting, compared to Whites (53%) and Blacks (49%); and 15 percent of Latinos with less than high school completion participated in voting, compared to Whites (37%) and Blacks (42%) peers (Llagas & Snyder, 2003).

Representation of appointed or elected officials. Latinos are underrepresented as appointed or elected officials nationwide, especially on school boards in contrast to the Latino population increase (Meier & Steward, 1991; U.S. Department of Education, 2003). The National Association of Latino Elected Officials (NALEO) Educational Fund reported that in 1996 the number of Latino/Hispanic elected officials were 4,787 in the United States, and of this number about 1,662 elected officials were Latino women.

In 2002, the total number of elected officials decreased to 4,624 Latino elected officials nationwide. About 3,293 are Latino men elected officials (1,070 Democrats, 92 Republicans, 946 No party affiliation, 7 Independents, & 1,178 Non-Partisans). About 1,331 elected officials are Latino women (407 Democrats, 26 Republicans, 397 No party affiliation, 5 Independents, and 496 Non-partisan). Overall, there are 1,694 Latino school board elected officials (men 1,119 and women 575) nationwide (S. Lainez, NALEO, personal communication, September 11, 2003).

Marital status, family and living arrangements. In 1998 Latino families made up 9.8 percent of all family households in the United States. According to the U.S. census (2000) Latino families continue to increase. About 69 percent are married couples; and women without a spouse head 23.2 percent of family households. Thus,

in family structure, 65 percent of Latino children live with both parents, compared to 78 percent of White and 37 percent of Black children (Llagas & Snyder, 2003).

Statistical data on Latino family structure show that there are significant differences among Latino sub-groups (U.S. Census data from 1998-2000). Cubans (80.7 percent) and Mexican Americans (72 percent) had the largest percentage of married families, whereas Puerto Ricans (37.7 percent) had the highest percentage of families headed by women (U.S. Census Bureau, 2000a, 2000b). Thus, 64 percent of Latino children under age 18 were living with both parents, compared to 76 percent of White non-Latino children. About 27 percent of Latino children live with one parent (U.S. Census Bureau). Further, according to the U.S census data (1998-2000) on living arrangements of children under 18 years with one or both parents, 24.3 percent of Latinos rented, 10.2 percent owned a home, 22.6 obtained public government housing and 24.7 obtained private subsidized housing for their families.

Synopsis of the Latino Economic, Social, and Educational Status

The empirical synopsis on the economic, social, and educational status/progress of Latinos is presented. Specifically, student' performance and academic achievement gaps that affect socio-economic status (SES) and upper mobility are addressed through the following discussion: (a) student characteristics and general demographics; (b) parental education and home language; (c) parental involvement; (d) access to computer and use of the Internet; and (e) teenage birth, alcohol, tobacco, and illicit drug use rates in U.S. schools.

Student characteristics and general demographics. Latinos comprise 12 percent of the total population (U.S. Census Bureau, 2000a), and by 2050 Latinos are projected to reach one-fourth of the total U.S. population (Llagas & Snyder, 2003). The U.S. Latino population is diverse. The four largest Latino sub-groups are Mexican Americans, Puerto Ricans, Cubans and recent immigrants from Central and South America. There are five main Latino sub-groups that comprise the Latino student population in U.S. schools, colleges and universities nationwide.

The largest Latino sub-group is of Mexican origin, which comprises two-thirds (66%) of the Latino population; Central and South American origin (15%), Puerto Rican origin (9%), Cuban origin (4%), and other Latino/Hispanic countries (6%) (NCLR, 2001; Llagas & Snyder, 2003; U.S. Census Bureau, 2000b). Each Latino sub-group varies in socio-economic, education, and immigration status (e.g., U.S. citizenship/permanent residency/naturalization). The lack of data on each specific Latino sub-group limit the overall analysis of the status of Latino education

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to the largest three Latino sub-groups. Thus, the discussion of Latino education is contingent upon the extent of the available data.

About 62 percent of Latinos were born in the United States. From this percentage, 32 percent had both parents who were native-born in the United States, and 30 percent had non-native born Latinos, foreign or mixed parentage. However, about 38 percent of Latinos had foreign-born parentage (Llagas & Snyder, 2003). Most Latino families were comprised of married couples (65%), but about one-quarter of the Latino children lived in homes with their mothers (25%), while few children lived with only the father (4%).

Parental education and home language. Statistical data on parental education and home language reveal that there is a gap between the percentages of White and Latino children whose parents attained at least a high school education or a bachelor's degree. For example, between 1974 and 1999, the Latino mother's highest education level slightly increased but was not significantly related to student's achievements, which were below Whites and Black students (Llagas & Snyder, 2003; NCLR, 1998).

Further, data on home language reveal that increasing number of Latinos spoke mostly English at home. For example, 55 percent Latino students grade K-5 spoke mostly English at home, 68 percent in grades 6-8, and 62 percent in grades 9-12. However, Latino students in grades K-12 who spoke mostly Spanish decreased as they advanced in grades. For example, 28 percent of the Latino students in grades K-5 spoke mostly Spanish, 21 percent in grades 6-8, and 22 percent in grades 9-12 (Llagas & Snyder, 2003; U.S. Department of Education, 2001b, 2001c, 2003).

Additionally, fewer Latino students spoke English and Spanish equally at home than those students who spoke mostly Spanish at home. For example, about 16 percent of the Latino students from grades K-5 spoke English and Spanish equally (U.S. Department of Education, 2003). In grades 6-8, 20 percent spoke English and Spanish equally; and in grades 9-12 it was 16 percent. Furthermore, according to the US Census Bureau (2000), 29 percent (ages 5 and over) in New Mexico spoke Spanish at home. New Mexico led all states, with Texas (27%) and California (26%) close behind (U.S. Census Bureau, 2002a, 2002b).

Parental involvement. The U.S. Department of Education stated that there are no significant differences in the percentage of parents of Latino and Black students who attended general school meetings, school events, and volunteered or served on school committees in 1999 (Llagas & Snyder, 2003). However, the data showed that the percentages of Latino and Black parents were lower (77%, 72%, respectively) than those of White (78%) students (Llagas & Snyder; U.S. Department of Education, 2003). Further, data on parental school choice and satisfaction reveal that proportionately more Latino and Black students attend public school chosen by their parents (18%; 23%, respectively) than do White students (11%). According to Llagas and Snyder, the level of satisfaction among parents of Latino students regarding their children's school (e.g., order, discipline, and teachers) were higher than for White or Black parents in assigned public schools.

Access to computer and use of Internet. The NCES 1998 student data (K-12) on technology support showed that 28 percent of Latinos have a computer at home,

compared to Whites (70%). Access to Internet data for Latino students (K-12) showed that most Latino students have access to the Internet at school (e.g., Latinos 71%, Whites 83%), whereas access to the Internet at home was lower for Latinos (8%) than for White students (83%). Therefore, Latino students (K-12) are less likely than White students to have a computer or to use the Internet at home (Llagas & Snyder, 2003).

Teenage birth, alcohol, tobacco, and illicit drug use rates. Data on student teenage birth rates and alcohol, tobacco, and illicit drug use of students reveal a pattern of negative student behavior among Latinos in U.S. schools. For example, in 2000 the Latino birth rate was 94 births per 1,000 females at ages 15-19, compared to the birth rates of their peers (33 births per 1,000 Whites, and 82 births per 1,000 Blacks); the Latino birth rate was 60 births per 1,000 females at ages 15-17, compared to the birth rates of their peers (16 births per 1,000 Whites, and 52 births per 1,000 Blacks); and the Latino birth rate was 144 births per 1,000 females at ages 18-19, compared the birth rates of their peers (57 births per 1,000 Whites, and 125 births per 1,000 Blacks) who gave birth in the U.S. (Llagas & Snyder, 2003).

Further, in 1999 data reported by U.S. Department of Justice, Bureau of Statistics on the student's use of alcohol, tobacco and illicit drugs reveal that more Latinos ages 12 to 17 years of age than Blacks reported engaging in the use of these products in the past month (U.S. Department of Justice & Bureau of Justice Statistics, 1994; Wirt et al., 2003). About 18.8 percent of the Latino students used alcohol as compared to 8.8 percent for Blacks; 10.2 percent used cigarettes compared to 6.1

percent for Blacks; and 10.4 percent used an illicit drug as compared to 9.8 percent for Whites; and 9.4 percent for Blacks (Llagas & Snyder, 2003).

Moreover, Latino and Black students are more likely than White students to feel too unsafe to go to school. About 10 percent of Latino students (9-12 grades) felt too unsafe to go to school, compared to Whites (5%); and about 14 percent of Latinos engaged in a physical fight on school property, compared to Whites (11%) (Llagas & Snyder, 2003).

Summary of the Latino Educational Participation and Attainment

This section will address the following aspects that represent the condition of education for the Latino population living in the U.S.: (a) preprimary education and kindergarten; (b) elementary, secondary, and high school education;(c) special education; (d) high school completion and drop out rates; (e) risk factors affecting student performance; (f) absenteeism; (g) grade retention, suspension, and expulsion rates; (h) academic performance; (i) Scholastic Assessment Test (SAT) and American College Test (ACT) scores; (j) financial aid; (k) undergraduate and graduate education;(l) Hispanic Serving Institutions (HSIs); (m) degrees conferred; and (n) adult education.

Preprimary education and kindergarten. Latinos under the age of 5 make up over 15 percent of their age group in the U.S. population (Rein, 2001). In proportion to the total child population, Latino children have been increasing faster than White and Black children (Llagas & Snyder, 2003). By 2020, the census projected that one

in five children will be of Latino/Hispanic origin. However, enrollment in preprimary education and kindergarten is less likely for Latino children than White or Black children at age 3, but are no less likely than White children at ages 4 and 5 (Llagas & Snyder, 2003; U.S. Department of Commerce, 1999; U.S. Department of Education, 2003). Early literacy activities data show that Latino children are less likely than White and Black children to read or visit a library. According to the National Center for Education Statistics (NCES) report by Llagas and Snyder (2003), a survey conducted by the National Household Education Survey (NHES) showed that in 1999 about 61 percent of Latino children had been read to; 40 percent had been told a story; and 25 percent had visited a library (p. 24). Thus, Latino children are less likely than White and Black children to engage in early literacy activities.

According to Llagas and Snyder (2003) statistical data on students' academic achievement showed that Latino kindergarten students are less likely than their White and Asian/Pacific Islander peers to stay focused on tasks, to be eager to learn, and to pay attention. About 67 percent of Latino first-time kindergartners stay focused on tasks, 70 percent are eager to learn, and 62 percent pay attention in class.

Elementary, secondary, and high school education. Enrollment of Latino children in preprimary education and kindergarten is lower than for White and Black children. In 1999, about 26 percent of Latino children were enrolled in preprimary education centers, whereas 47 percent of White and 60 percent of Black children were enrolled at age 3. In 2000, Latinos comprised 16.6 percent of the public elementary and secondary schools student population enrollment, compared to 61 percent White

and 17 percent Black. From 1980 to 1999, about 86 percent of the migrant children were enrolled in U.S. schools. About 13 percent were in pre-school, 52 percent were in elementary school (K-6), and 30 percent were in secondary school (7-12) (Llagas & Snyder, 2003).

In 1999, Latinos comprised 14 percent of the public high school enrollment, compared to 65 percent White and 15 percent Black; and 9.5 percent of enrollment in colleges and universities in the United States, compared to 74.3 Whites and 11.87 Blacks (Llagas & Snyder, 2003). About 57 percent of the Latinos ages 25 and over have at least a high school education in 2000 (National Council of La Raza, 1998, 2001; U.S. Census Bureau, 2000a).

Special education. Data on special education reveal that Latino students (ages 3-21 years of age) are about as likely as Whites to receive special education services, but are more likely than Asians/Pacific Islanders and less likely than Blacks and Native Americans/Alaskan Natives to receive special education services (U.S. Department of Education, 2000). For example, from 1999-2000, 13 percent of children ages 3-21 years old received special education services under the Individuals with Disabilities Education Act (IDEA). Latinos serving under IDEA accounted for 11.3 percent, Asians/Pacific Islanders were 5.9 percent; Blacks were 14.9 percent; Native Americans/Alaskan Natives were 14.1 percent; and Whites were 10.9 percent (Llagas & Snyder, 2003).

High school completion and drop out rates. In 2000, 64.1 percent of Latinos 18-24 years old completed high school, compared to 91.8 percent of Whites and 83.7

percent of Blacks. High school completion rates for all Latinos ages 25-29 were 81.3 percent for U.S. born citizens, 70 percent for foreign-born (U.S. citizen by naturalization), and 40.2 percent for foreign-born (non-U.S. citizen) (White House Initiative for Hispanic Educational Excellence, 2003). Further, in 2002, data on educational attainment of Latinos (aged 25 years old and above) showed that Cubans (36.35%) had a higher rate of high school completion among all Latinos, whereas Mexican Americans had 33.72 percent high school completion; Central or South Americans had 29.77 percent high school completion; Puerto Ricans had 27.89 percent high school completion; and Mexican Immigrants (non U.S. citizens) had 21.3% high school completion. About 17.68 percent Mexican Americans of the same age group had some college but no degree, compared to their White peers (18.18%).

About 7.25 percent of Puerto Ricans had an associate degree, compared to their White peers (8.63%); and 18.17% of Cubans had a bachelor or higher degree, compared to their White peers (28.58%) (U.S. Department of Education, 2003). The data show that Latinos lag behind Whites in high school completion, associate degrees, and advanced degrees. Specifically, the data reveal that Cubans have higher rates of educational achievements than other Latinos.

Data on dropout rates show that Latinos are less likely than Whites and Blacks to acquire a high school diploma or an equivalent credential including a General Educational Development (GED) credential. For example, in 2000, 64 percent of Latinos ages 18 to 24 completed secondary schooling, compared to their White (92%) and Black (84%) peers. According to the 2001 status dropout rate, Latinos have the

highest rate (27%), compared to Whites (7.3%), Blacks (10.9%), and Asians/Pacific

Islanders (3.6%). Thus, there is a greater dropout rate among Latino immigrants than

other non-Latino immigrants (Kafman, Alt, & Chapman, 2001). The status of the

dropout rate for the Latino immigrant was 43 percent in 2001. About 15.4 percent

were first generation Latino, and 14.4 percent were second generation Latino (Wirt et

al., 2003).

 Risk factors affecting student performance. The student's future academic and

socio-economic outcome is measured by four family background factors: (1) having a

mother with less than a high school education, (2) living in a family on welfare or

receiving food stamps, (3) living in a single-parent family, and (4) having parents

whose primary language is a language other than English (Llagas & Snyder, 2003).

In 1998, 33 percent of Latino students in kindergarten had two or more risk factors,

compared to Whites (6%), Blacks (27%) and Asians/Pacific Islanders (17%).

Approximately 38 percent of Latino students in kindergarten had one risk factor,

compared to Whites (23%), Blacks (44%), and Asians/Pacific Islanders (44%). Thus,

the percentage of Latino children with two or more risk factors is higher (Llagas &

Snyder, Wirt et al., 2003).

 Absenteeism. Latino students, from 8th grade to 12th grade, have higher

absenteeism rates than Whites. In 2000, 26 percent of Latino students in the 8th grade,

and 34 percent of Latino students in the 12th grade were absent 3 or more days from

school. In contrast, 19 percent of White and 22 percent of Black students in the 8th

grade; and 27 percent of White and 29 percent of Black students in the 12th grade (Llagas & Snyder, 2003).

Grade retention, suspension, and expulsion. Latino students have a higher retention rate in grade, and suspension/expulsion rates than Whites, but lower than those of Blacks. In 1999, 13 percent of Latino students in grades K-12 repeated a grade, compared to Whites (9%), and Blacks (18%); and 20 percent of Latino students in grades 7-12 were suspended or expelled, compared to Whites (15%), and Blacks (35%) (Llagas & Snyder, 2003).

Academic performance. The average scores of the National Assessment of Educational Progress (NAEP) that tracked reading, math and science scores of 9, 13, and 17 year old from the early 1970s to 1999 indicated that Latinos continue to be underachieving, academically. As indicated by the U.S. Department of Education (2003) statistical data, the Latino students (National Assessment of Educational Performance [NAEP], from 1975-1999) had higher reading scores in 1999 than in 1975, but reading scores still remain lower than those of White students (Wirt et al., 2003). In 1999, average reading NAEP scores among 9-year-old Latinos were 13 percent below the White's scores (a 28 points gap); among 13-year-old Latinos, scores were 9 percent below the White's scores (a 23 point gap); and among 19-year-old Latinos, scores were 8 percent below the White's scores (a 24 point gap). These data reveal that Latinos continued to under-perform from 1975 to 1999, having consistently lower reading scores in Reading NAEP (Llagas & Snyder, 2003).

The Latino student's performance in mathematics (NAEP, 1970-1999) was lower than that of the White students at all three age levels in 1999, but Latinos (13 and 17 years old) scored higher than Black students. The gap between Latinos and Whites showed a statistical significance when student performance was divided by parental educational attainment categories. This reflected a 16-point gap between Latinos and Whites whose parents graduated from high school, an 18-point gap when parents had some education after high school, and a 24-point gap when parents had graduated from college (NCES, 2003). The data reveal that Latinos continued to under-perform from 1973 to 1999, having consistently lower mathematics scores in the NAEP.

The Latino student's performance in science (NAEP, 1977-1999) revealed higher scores in 1999 than in 1977. Although an increase in scores was noted in 1999, the data reveal that a gap between Latinos and White students' science NAEP scores remains unchanged since 1977. In 2000, the students' NAEP science scores categorized by parental educational attainment showed that the gap between Latinos and Whites whose parents did not finish high school was 9-points; compared to an 18-points gap for those whose parents graduated from high school; and 24-points for those whose parents had graduated from college (Llagas & Snyder, 2003). Thus, since 1977 to 2000, the Latinos NAEP science scores have remained unchanged.

The Latino high school students' academic and vocational credits have improved from 1982 to 1998, suggesting that the academic credits gap between Latinos and Whites narrowed in 1998. For example, Latino high school students are

less likely than White students to complete advanced mathematics, advanced science and advanced English courses, but are more likely than White and Black students to complete advanced foreign language courses (Llagas & Snyder, 2003). Furthermore, Latino students taking Advanced Placement (AP) examinations increased from 24 to 111 per 1,000 12th graders between 1984 and 2000 but remains below White students (Wirt et al., 2003). It can be noted that the academic credits gap has narrowed; still Latinos are less likely than Whites and Blacks to complete advanced mathematics, science and English courses in preparation for after high school educational goals.

Scholastic Assessment Test (SAT) and American College Test (ACT). White and Black students have higher SAT-taking rates than Latinos (Llagas & Snyder, 2003, p. 62). In 2001, 9 percent of the student population that took the SAT were Latinos, compared to 66 percent White and 11 percent Black students. On the average, Latinos score lower on the Scholastic Assessment Test (SAT) and the American College Test (ACT) than White students, but higher than Black students. For example, in 1991, the Latinos' average SAT verbal scores were 458, compared to 518 for Whites and 427 for Blacks; and the Latinos' average SAT math scores were 462, compared to 513 for Whites and 419 for Blacks. In 2001, the Latinos' average SAT verbal scores were 460, compared to 529 for Whites and 433 for Blacks; and the Latinos' average SAT math scores were 465, compared to 531 for Whites and 426 for Blacks.

Moreover, in 2001, students from Latino sub-groups scored below the national average and below Whites on the SAT, but higher (on the average) than Black

students. In contrast, Latino/Hispanic students scored higher on the SAT, on the average, than students of Mexican or Puerto Rican origin. In 1991, the Mexican American's SAT verbal scores (on the average) were 454, as compared to 436 for Puerto Ricans; and the SAT math scores (on the average) were 459, as compared to 439 for Puerto Ricans. In 2001, the Mexican American's SAT verbal scores (on the average) were 451, as compared to 457 for Puerto Ricans; while SAT math scores (on the average) were 458, as compared to 451 for Puerto Ricans (Llagas & Snyder, 2003; U.S. Department of Education, 2003).

The College Testing Examination (ACT) is another standardized test used by U.S. colleges and universities as a criterion for entry. The ACT composite average score for Latinos is below the minimal ACT composite score for entrance to college/university in the United States (Llagas & Snyder, 2003; U.S. Department of Education, 2003). Thus, a composite score of 19 on the ACT indicates minimal readiness for college. In 2001, the average composite score for Mexican Americans was 18.5 and for Puerto Ricans was 19.4, as compared to 21.7 for Asian/Pacific Islanders, 21.8 for Whites, and 16.9 for Blacks.

Financial aid. Blacks and Latinos receive more financial aid than their White peers. However, more Whites than Latinos and Blacks obtain work-study. From 1999 to 2000, Blacks (69.5%) and Latinos (58.3%) received more financial aid than Whites (37.5%). In federal aid, Blacks (55.3%) and Latinos (46.4%) received more aid than Whites (37.5%). In non-federal aid, Blacks (39.9%) and Whites (36.7%) received more aid than Latinos (36.5%). About 58.3 percent of Blacks and 50.3 percent of

Latinos received grants for their undergraduate studies, compared to 41.1 percent of White students. In federal grants, 41.1 percent were given to Blacks and 35.1 percent were given to Latinos, compared to 17.7 percent given to Whites. In non-federal grants, 36.9 percent were given to Blacks and 33.3 percent were given to Latinos, compared to 34 percent given to Whites. Additionally, 35.9 percent of Blacks and 29.1 percent of Whites receive a loan, compared to 24.4 percent of Latinos. In federal loans, 35.2 percent were given to Blacks and 28.2 percent were given to Whites, compared to 23.3 percent of Latinos. In non-federal loans, White students obtain the highest percentage (4.2%), compared to 3.5 percent of Latinos and 3.3 percent of Blacks. However, about 5.9 percent of Black students obtained work-study, compared to 5.5 percent of Whites and 5.3 percent of Latinos.

In adult education, data were limited. But, according to the U.S. Department of Education, Adult Education and Lifelong Learning Survey (2001), a higher percentage of Whites received employer financial support for education than Latinos (Wirt et al., 2003).

Undergraduate and graduate education. Latinos who are U.S. citizens are more likely than the general Latino non-U.S. citizen population to enroll in college or university. In 2000, 22 percent of 18-24 year old Latinos were enrolled in colleges and universities, compared to 39 percent of Whites and 31 percent of Blacks (Llagas & Snyder, 2003). Although the enrollment rates continue to increase, the data show that Latinos continue to enroll at lower rates than their White and Black counterparts. Latino enrollment rate for 2-year colleges and universities is higher than for 4-year

colleges and universities. For example, in 2000, Latino students accounted for 14

percent of the students enrolled in 2-year institutions, compared to Whites (64%) and

Blacks (12%). Latino students accounted for 7 percent of the students enrolled in 4-

year institutions, compared to Whites (71%) and Blacks (11%) (U.S. Department of

Education, 2003).

Hispanic serving institutions. In 1999 there were a total of 335 institutions of

higher education classified as Hispanic Serving Institutions (HSIs) throughout the

United States. These institutions are designated as HSIs because they have at least a

25 percent Latino student enrollment. Latino enrollment in HSIs[1] has continued to

increase from 1990 to 1999 (Llagas & Snyder, 2003). In 1990, about 782,449 of

Latinos enrolled in HSIs and by 1999, about 1,316, 616 of Latinos enrolled in HSIs,

hence a 68 percent change from 1990 to 1999 (Llagas & Snyder, 2003, p. 166). In the

fall of 2000-01, 17 States had HSIs (e.g., Alabama, Arizona, California, Colorado,

Connecticut, Florida, Illinois, Massachusetts, Minnesota, New Jersey, New Mexico,

New York, Oklahoma, Oregon, Texas, Washington, and Puerto Rico) (Llagas &

Snyder, 2003; U.S. Department of Education, 2003; Wirt et al., 2003).

Degrees conferred. From 1999-2000, 9.1 percent (51,541) associates degrees

were conferred upon Latinos; compared to 72.3 percent (408,508) for Whites and

10.7 percent (60,181) for Blacks. About 6.1 percent (74,963) of the Latino population

ages 25 and over obtained at least a bachelor's degree; as compared to 75 percent

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[1] HSIs are degree-granting institutions of higher education eligible for Title IV funding in the United States and Puerto Rico, with a Latino undergraduate full-time enrollment of 25 percent or more (NCES, 2003). Presently, there are 334 HSIs nationwide including Puerto Rico (NCES, 2003).

(928,013) of Whites and 8.7 percent (107,891) of Blacks (U.S. Department of

Education, 2003). In 1999-2000, Latinos earned bachelor's degrees in business, social

sciences, history, psychology, and education. Masters degrees earned by Latinos were

primarily in education (33%) and business (22%). Doctoral degrees in education

(20%) and Psychology (17%) were the greatest percentage earned compared to other

fields (U.S. Census Bureau, 2000b).

Data on bachelor's degrees conferred upon Latinos indicated a higher

percentage rate for Latinos than for a master's or doctor's degree. About 4.8 percent

(3,865) Latinos obtained a first professional degree, compared to 74.4 percent

(59,601) Whites and 6.9 percent (5,552) Blacks (U.S. Census Bureau, 2001; U.S.

Department of Education, 2003). For master's degrees conferred in 1999 to 2000,

Latinos represented 4.2 percent (19,093); of the total as compared to 69.6 percent

(317,999) for Whites and 7.8 percent (35,625) for Blacks. About 33 percent of

master's degrees in education and 22 percent of master's degrees in business were

conferred upon Latinos, compared to the total degrees conferred (27%, 25%

respectively) (Llagas & Snyder, 2003, p. 103). Latinos are more likely to earn

master's degree in education, business, public administration, and health related

sciences. However, Latinos are less likely to earn degrees in computer/information

sciences, engineering and engineering related technologies, and science (Llagas &

Snyder, 2003; U.S. Department of Education, 2003).

Doctoral degrees conferred upon Latinos were 2.9 percent (1,291); compared

to 61.4 percent (27,492) for Whites and 5 percent (2,220) for Blacks. Latino doctoral

recipients are more likely to have majored in education (20%) and psychology (17%) than are other students (15%, 10%, respectively). Latinos are less likely to earn doctoral degrees in engineering and physical sciences. Statistical data on doctoral degrees conferred to women by degree-granting institutions suggest that there are an approximate 2.77% of Latinas with a doctoral degree in the United States (U.S. Department of Education, 2001).

Adult education. Latinos tend to participate more in part-time education, than full-time adult education programs in U.S. colleges and universities. About 41 percent of Latinos ages 17 and above participated in adult education in 1999 (Wirt et.al., 2003). Of this number, 44 percent of the Latinos participating in adult education were employed, compared to 53 percent for Whites.

Moreover, 16 percent of Latinos enroll in part-time adult education for personal development, specifically for a basic education and for English-as-a second-language than other minorities. However, about 7.1 percent of Latinos participate in full-time college or university credential programs[2] for work-related (21.6) and personal-interest (16.3) courses, compared to Whites (7%) in work-related (31.7%) and personal-interest (21.6) courses; and Blacks (7.5%) in work-related (23.4%) and personal-interest (25.7%) courses (U.S. Census Bureau, 2000b; U.S. Department of Education, 2003; Wirt et al., 2003).

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[2] Full-time participation in a college or university credential program or in a vocational or technical diploma program.

Rundown of the Condition of Latinos and their Impact to the National Economy

According to the U.S. Census Bureau (2003) and the Bureau of Labor Statistics (2003), the projections of Latino population growth will impact the national economy. The Latino population is expected to increase at a faster rate than Blacks and Asians (U.S. Bureau of Labor and Statistics, 2003). Subsequently, by the year 2050 Latinos will comprise 25 percent of the U.S. population and 23.7 percent of the total labor force (U.S. Bureau of Labor Statistics, 2003; M. Toossi, personal communication, September 11, 2003). In this section, I offer a summary of the main issues concerning the economic, social and educational condition of the Latino population living in U.S.A., and how it impacts on the national economy in terms of capital investment for public and private industry, and on the U.S. government.

The civilian workforce is projected to increase by approximately 17 million, reaching 158 million in 2010 (Fullerton & Toossi, 2001; Toossi, 2002). The Latino labor force is projected to surpass the labor force of Blacks by 2010. While Latinos continue to increase in population and in labor force participation, educational achievement continues to "lag behind the rest of the nation" (White House Initiative, President's Advisory Commission on Hispanic Educational Excellence, 2000, p. 10; Haro, 1983; Llagas & Snyder, 2003; U.S. Department of Education, 2003; Wirt et al., 2003). Latinos will make up nearly 25 percent of the elementary school-age population (K-8), 23 percent of the secondary school-age population (9-12); and 22 percent of the college-age population (undergraduate education) by the year 2025

(White House Initiative on Educational Excellence for Hispanic Americans, 1996, 1999, 2000a, 2000b, 2000c).

However, as stated previously, dropout out rates continue to demonstrate that Latinos are less likely than Whites and Blacks to attain a high school diploma or its equivalent (GED). For example, in 2000, 44.2 percent of foreign-born Latinos were high school dropouts. From grades 10-12, about 7.4 percent of the young Latinos drop out of school, compared to White (4.1%) and Black (6.1%) students (U.S. Department of Education, 2003). A dropout rate of the 16-24 year old Latinos (27.8%) was higher than those of Whites (6.9%) and Blacks (13.1%). Thus, the data suggest that Latinos continue to constitute a larger group of dropouts than their White and Black counterparts.

The retention within a grade (13%) and the suspension/expulsion (20%) rates of Latinos is higher than among the White or Black students from grades K-12. In addition, Latino students continue to have lower NAEP performance in reading, mathematics and science, which suggests a link between their lack of academic performance and their continuing lower level occupations in the labor market (e.g., manual and service jobs are obtained at lower wages than Whites or Blacks) with lower upper-mobility opportunities.

Consequently, as entrance to college and universities gets more competitive, Latino high school competitors lag behind their peers. Latino high school graduates have lower rates of advanced placement, credits, and honor courses, as do their counterparts (U.S. Department of Education, 2003). Additionally, Latinos score

below the national average in SAT/ACT examinations for entrance to college.

Therefore, a smaller proportion of Latinos enroll in 4-year (7%) colleges and

universities; and major in less competitive or popular degrees (e.g., due to

predominantly institutional higher standards of admissions to these fields). Instead,

higher proportions of Latinos enroll in community colleges or 2-year universities

(14%), and earned more associate degrees (9%) than their counterparts.

The rate of degrees conferred upon Latinos narrows as Latino students further

themselves in colleges and universities throughout the nation (e.g., Bachelors degrees

6%, master's degrees 4%, doctor's degrees 3%). There is a smaller proportion of

Latinos who complete college (10%), which is lower than their peers. Thus labor

market opportunities for those Latinos with a higher education seem to trickle down

(U.S. Department of Education, 2003; Wirt et al., 2003; White House Initiative,

2000a, 2000b, 2000c).

Additionally, there are a large percentage of Latino students who continue to

attend disadvantaged schools where academic and productive environments are less

conducive to learning (Peng, Wright & Hill, 1995; as cited in The Educational

Progress of Hispanic Americans, U.S. Department of Education, 1995). With a higher

proportion of Latinos than non-Latinos who are foreign-born, Latinos are more likely

to have limited English proficiency and a lesser understanding of U.S. culture.

Parental involvement of Latino students is lower than for parents of White and Black

students (U.S. Department of Education). Thus, the educational progression of Latino

students relies on the school and its staff as well as its curriculum. Therefore, it is

reasonable to state that there is a gap between Latino and White students, particularly with respect to educational access, achievement, and attainment over time.

As stated previously, there are distinctive educational differences between Latino and White students, particularly in preschool attendance, demographics, academic achievement, dropout rates, school climate, parental involvement, course-taking patterns, SAT/ACT scores, educational aspirations, college attendance and completion rates, types of degrees earned, labor market outcomes, and adult literacy levels. Therefore, because the outcome of education is "an educated, productive, and engaged citizenry" (Llagas & Snyder, 2003, p. 113), indicators of social and economic outcomes of education, occupational status, and voting participation measure educational achievement as well as upper mobility in U.S. society (U.S. Department of Education, 2003; Wirt et al., 2003, White House Initiative of Hispanic Educational Excellence, 2000a, 2000b, 2000c).

Based on the statistical and demographical data (White House Initiative on Educational Excellence for Hispanic Americans, 2003), the inequities and gaps in Latino educational achievement are demonstrated by the educational under performance and continuous over representation of Latinos in manual and service occupations. Further, Latino voting participation rates increase with levels of educational attainment. The data suggest lower participation rates due to a lack of educational attainment among Latinos. For example, the voting rates for persons 18 years old and over in 2000 show that Latinos have lower voting participation rates

than Whites and Blacks by all educational attainment levels (Llagas & Snyder, 2003; U.S. Department of Education, 2003; Wirt et al., 2003).

Llagas and Snyder (2003) established that the status of education of Latinos is illustrated by the gaps in educational performance between Latinos and White (non-Latino) students. These gaps, as argued by Llagas and Snyder, foster a condition of inequity for Latinos in educational achievement, access, and outcome that further impact the Latino socio-economic status in the United States. The condition of Latino education is subsequent to the educational achievement pipeline (Llagas & Snyder, 2003; U.S. Department of Education, 2003; Wirt et al., 2003). Latinos are educationally, socially and economically disempowered with high rates of poverty (e.g., 33.6% children or 7.8 million in 2000) (Duignan & Gann, 1998; National Council of La Raza [NCLR], 2003; Trueba, Rodríguez, Zou, & Cintrón, 1993; U.S. Census Bureau, 2001; U.S. Department of Education, 2001).

Culture and Latino Culture

The concept of culture evolves from various philosophical frameworks and scholarships (e.g., anthropology, sociology, psychology, and education) that provide a unique definition and understanding of the complexity as well as the dynamics in which humanity exists. To this end, I provide an overview of culture and Latino culture through the following topics: (a) definitions of culture, (b) importance of understanding culture, and (c) synthesis of Latino culture in the U.S.

Definitions of Culture

Definitions of culture have evolved overtime (Finkelstein, Pickert, Mahoney, & Barry, 1998; Trueba et al., 1993). The meaning of culture varies among fields of study from anthropology, sociology, and psychology (Finkelstein et al.). For example, in anthropology, culture is "made up of the concepts, beliefs, and principles of action and organization" (Goodenough, 1976, p. 5, as cited in Trueba et al., 1993). In sociology, culture is defined as the center of individual self-value (Brice, 2001). However, in psychology, culture is defined by "shared attitudes and habits, called schemas, adaptive to one's family, ethnic community, and occupation" (Thomas & Znaniecki, 1918, 1958, as cited in Rudmin, 2003, p. 10). Moreover, the term culture is also used to state the culture of an organization (Rudmin). This definition will be addressed in relation to leadership, and its organizational culture in a later section of this review.

According to Spradley (1972) the understanding of culture is informed by the semantics of biological, social class, human nature, human-group, omnibus, artifact, behavioral, and cognitive definitions. For example, in its biological definition, culture refers to the cultivation of bacteria in a test tube. A social class definition submits to the forms of habits of a structured society. The human nature definition sees culture as the distinction between human behaviors and those of animals. The human-group definition uses culture as a synonym for society or community. In its omnibus definition, "culture is everything" (p. 6). In its artifact definition, culture becomes a qualifier of material goods made by specific group, community or society. In its behavioral and cognitive definitions, culture is seen as a pattern of behavior or a way of life; and as a set of knowledge, ideas, and beliefs (Spradley).

Wolcott (1987) stated, "culture is an amorphous term" (as cited in Creswell, 1998, p. 59). In its principal epistemological form, the term culture derives from the Latin "cultura," which means cultivation. Culture, according to Spradley (1980), "consists of what people do (behaviors), what people say (language), and some tension between what people really do and what they ought to do as well as what they make and use (artifacts)" (as cited in Creswell, p. 59). Specifically, culture is a set of norms, values and beliefs within a particular group or community (Spradley).

For the purpose of this study, I will use Geertz' definition of culture as "an array of symbolic forms, social habits, material constructions, and educational efforts" transmitted from generation to generation (Geertz, 1973, as cited in Finkelstein et al., 1998, p. 9).

Therefore the meaning of culture is "educationally constituted and transmitted" within the members of society (Finkelstein et al., p. 9). Thus, in this manner, culture portrays the characteristics of ethnic groups within our overall society (Creswell, 1998; Geertz, 1973; Wolcott, 1987).

Importance of Understanding Culture

According to cultural anthropology and cultural studies, the cultural systems of societies differ from one another (e.g., American, African, Chinese, Greek, Indian, Iranian, Russian, Spaniard, etc.) making them unique in the way *knowledge or cognition* is stored, formed, and transmitted (Spradley, 1972). Banks (2001) stated that the process and transmission of knowledge is sequential to our understanding of culture. "Cultures are dynamic, complex, and changing…. Cultures are also systems; they must be viewed as wholes, not discrete and isolated parts" (Banks, p. 71). Therefore, in order to understand culture, cultural knowledge is fundamental. "Race, social class, gender, and other personal and cultural characteristics of knowers influence the knowledge they construct and produce" (p. 9). Subsequently, "human knowledge… is influenced by what we select and how it is transformed in the process of knowing" (Spradley, 1972, p. 11) Cultural knowledge is transmitted across cultures by multicultural education, multi-ethnic education and diversity awareness. Within these educational concepts for cultural transmission, we learn to understand our own individual diversity, which then allows us to understand stereotypes, reduce

prejudice, promote equity in pedagogy, and integrate educational content from different cultures in our overall society (Banks).

Culture outlines the major aspects of human knowledge or cognition (Spradley, 1972). The concept of culture explains how knowledge is stored and processed, and concepts are formed and then transmitted (Spradley). By understanding the concept of culture and one's own culture, one has the ability to effectively function in other cultures (Trueba at al., 1993). Further, by understanding culture, one can understand diversity (Banks, 2001).

Synthesis of Latino Culture in the U.S.

Latinos are not a homogeneous group (García, 2000) and therefore, they do not have a homogeneous culture *per se* (Novas, 1994). Because Latinos differ by nationality, race, religion, language, folklore, customs, and traditions as well as socio-economic status, immigration to U.S., and education levels, finding a common Latino culture is complex (García, 2001; Gracia, 2000; Meier & Stewart, 1991, Reich, 1989, Trueba, 1999). Further, as established by Trueba et al., 1993, "there are significant differences between Mexicans, Puerto Ricans, Cubans, Central Americans, South Americans, Spaniards; and there are important differences in life-style and cultural values among rural, low-income, and an upper-income persons within the same sub-group" (p. 35). Unfortunately, the labeling of all Latinos under the census term of "Hispanic," creates a false impression that all Latinos have the same ethnic characteristics, and nationality (Trueba et al., 1993; Trueba, 1999; Zambrana, 1987).

Despite their differences, Latinos do hold various cultural characteristics that integrate each sub-group based on its similarities (Zambrana, 1987) (e.g., Spanish-speaking heritage, self and collective identity, values and beliefs, customs and traditions, struggles) that allow them to interact as inside members within the Latino community (Abalos, 1998; Novas, 1994; Reich, 1989; Trueba et al., 1993; Walsh, 1991). In this review, I will discuss general Latino culture characteristics that embody all Latino sub-groups, specifically, retention of ethnic identity, tendency towards familism, and Spanish language maintenance (Hidalgo, 1998; Wortham, Murrillo, & Hamann, 2002).

Hurtado (1995) found that Latinos share a strong ethnic identity. Latino collective cultural identity is based on: (1) census categorical label of Hispanic as a choice for ethnic identification for Spanish speakers living in the U.S., (2) social and psychological reality that labeled Latinos as a minority ethnic status, and (3) ethnic movements (e.g., *Latinidad*, *Latinos Unidos*[3]) that have made Latino ethnicity a cultural system that reinterprets the reality based on the perspective of the Latino ethnic majority (Abalos, 1998; Reich, 1989).

Trueba (1999) found that Latinos face ethnic identity transition from home culture identification to a new identity as Americans from a specific Latino descent (e.g., African, Caribbean/Central/South American Indian, European, Spanish … roots). Through this transition, Latinos create "a new identity on the basis of common cultural values and the increasing advantages of … alliances for action presumed to

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[3] Latino Heritage, Latinos United.

benefit the diverse Latino ethnic sub-groups" (Trueba, 1999, p. 22). And in order to

survive, Latinos develop a common cultural system (Hidalgo, 1998; Reich, 1989).

Additionally, "cultural systems both interpret reality, serving as a model *of* what is

going on, and they shape reality, serving as a model *for* what is going on" (Reich, p.

9). Thus, Latinos become ontologically united despite of their heterogeneity (Trueba,

1999), and therefore, the overall Latino identity is derived by the perception of a

common culture that represents 43 Latino/Hispanic and Spanish-speaking countries

within the concepts of race pride and American identity (Rhea, 1997).

Each Latino ethnic sub-group shares common experiences, learned through

education and socialization, and transmitted from generation to generation, embodied

in thought, language, action, artifacts, norms, values, and beliefs (Bernal & Knight,

1993; Hurtado, 1995; Trueba, 1999; Zambrana, 1987, 1995; Zambrana et al., 1997;

Zambrana & Zoppi, 2002). Further, each sub-group holds their own national cultural

identity that makes them unique but separates them from other ethnic sub-groups. For

example, Costa Ricans share the same culture (e.g., food, language accent, folklore,

music, customs, traditions…) that differs from those of Cuban descent.

Consequently, "Latinos retain multiple identities, multiple interactional

settings, and diverse 'situated selves' at one point in time. They can code-switch from

one ethnocultural setting to another and use different linguistic forms and nonverbal

behaviors" (Trueba, 1999, p. 12). Therefore, despite different national cultural

identities, Latinos share a common bond of retaining their ethnic identity born of the

Spanish heritage that historically colonized them (García, 2001; Gracia, 2000; Massey, Zambrana, & Alonzo Bell, 1995; Rodríquez, 1999).

Familism is a form of social structure in which the needs of the family as a group are more important than the needs of the individual family member (Brice, 2001). Hurtado (1995) reports that Latinos, regardless of their roots or places of origin, show strong dedication to the family. According to Pérez, Pinzón, and Garza (1997), self-esteem and self-identity are byproducts of strong Latino family ties. Among Latinos, familia is "synonymous with security, nurturance, love, and comfort" (Mayo, 1997, p.53 as cited in Brice, 2001), and the concept of family is idealized as something sacred (de Paula, Lagana, & González-Ramírez, 1996; A. Rodríguez, 1999). For Latinos, *compadrazgo* or coparenthood is the extended family units (Brice, 2001; Massey, Zambrana, & Alonzo Bell, 1995; Pérez, Pinzón, & Garza, 1997) frequently including *compadres* (godfathers) and *comadres* (godmothers) as confidants who assumed a co-parenting role (Hurtado, 1995; Hurtado & Gurin, 1987; Kalyanpur & Harry, 1999). This link is special and central to family values, which endure as interfamily systems of support, affection, and friendship.

Additionally, for Latinos, mothers are respected and honored as the heart of the family (Rodríguez, 1999). Fathers are seen as the head of the household, seat of authority, and provider for the family. For many Hispanic cultures, the father's dominance and the submissiveness of the mother have created the exemplification of machismo. However, most Hispanic families share decision-making. In addition,

older siblings play an important role in the socialization and care of their infant brothers and sisters, cousins, etc. (Brice, 2001).

Regardless of their national origin or individual group membership, Latinos hold a strong sense of family unity and preference for extended family networks (familism) as part of their cultural values, beliefs, and norms (García, 2000; Hidalgo, 1998; Hurtado, 1995; Trueba, 1999; Zambrana, 1995). Family and extended families are centers for survival and nurturing (Massey et al, 1995), family support (Sabogal, Marín, & Otero-Sabogal, 1987), and transmission of Latino culture (Bordas, 2001; Brice, 2001; E. García, 2001). For example, Latino parents have the most direct impact on the formation of their children's educational aspirations. Larosa's research (1978) showed that Mexican American mothers employ different behavior than mainstream American when teaching specific tasks to their children (i.e., responsibility to learn on their own, encourage and motivate, and rewards/or *castigos* - punishments) (Massey et al., 1995; Mirande & Enríquez, 1979; Zambrana, 1987).

Latinos have a strong sense of commitment and service to family (Knight, Bernal, Cota, Garza, & Ocampo, 1993; Sotomayor, 1991). Therefore, Latinos have extra-familial responsibilities as part of the cultural norms (Sotomayor). Personal aspirations and self-sacrifice are driven by familial factors (García, 2001; Massey et al, 1995; Rodríguez, 2000). For example, a son/daughter may not go to college to take care of ill parent; or relatives are expected to care for each other, and rely on each other for support (e.g., economically, psychologically) (Brice, 2001). Further, Latinos seek to have close geographical proximity to family and extended family members

(Sabogal et al., 1987). For example, a son/daughter may not take a job with better salary away from relatives.

Another aspect of family is its function of cultural transmission for generations (Sotomayor, 1991). Cultural factors are driven by Latino family dynamics that sponsor collective support, assistance that provides stability, and coping mechanisms (Abalos, 1998; Farkas, 1996; F. Padilla, 1985a, 1985b). Additionally, cultural factors are also driven by ethnic values, traditions and norms within the Latino heritage (Padilla, 1985a; Trueba, 2001). For example, "la comunidad" value (high value for Latino community) symbolized by the passionate mentality of "*hermandad*" (brotherhood/sisterhood) among members of "*La Raza*" (The race: Latino) is part of the cultural factors that influence Latinos across the United States (Trueba, 2001). Further, collective effort and support produce shelter from "being afraid," "internalizing problems," and "personalizing issues" (Abalos, 1998; Massey et al., 1995), which promotes stability and coping mechanisms within the mainstream community (Spring, 2001).

As a result, family functions as a source of cultural capital in which values, beliefs, and norms are passed on (Bourdieu, 1985). According to Farkas (1996), security, stability, survivability, and growth are interdependent on familial factors where mutual growth is sponsored by cultural values. Portes (2000) establishes that Latinos sponsor mutual growth, which comes out as a natural instinct from cultural norms that are attached to the desire to help "la comunidad" (Novas, 1994; Portes, 2000; Portes & Rumbaut, 1996).

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Language is the principle means through which the socialization process is accomplished (Madding, 1999, as cited in Brice, 2001). It is one of the most powerful and pervasive purveyors of culture. It holds a fundamental role in the transmission of beliefs, values, and customs (Brice, 2001). For Latinos, Spanish represents a common bond, solidarity within a diverse population, and a cultural link, despite its many dialects and transmutations (Massey et al., 1995). Hence, "Spanish is at the heart of Latino cultures" (Hidalgo, 1998, p. 113).

Even though the Spanish language has various regional dialects, and accents, it predominates as a common characteristic of all sub-groups in the U.S. (Massey et al., 1995). Consequently, the maintenance of Spanish-speaking language and heritage is a shared bond among all Latino subgroups (Hidalgo, 1998; Zambrana & Zoppi, 2002). This bond offers Latino sub-groups a bridge between nationalistic/individual (e.g., Boricua), and collective identities (e.g., Latino/a) (Larrain, 2000). The maintenance of the Spanish language is explained by the positive attitude and desire to preserve it among all sub-groups (Hurtado & Gurin, 1987; Pérez et al., 1997).

Further, Latino heritage maintenance is the affinity in which cultural values and customs within the diversity of Latino cultures continue to be nurtured by all Latino sub-groups in the U.S. (Chahin, 1993; Darder, Torres, & Gutiérrez, 1997). For example, Latinos in the U.S. tend to maintain and celebrate cultural traditions such as Hispanic Heritage Month, *Cinco de Mayo* (May 5th), and *el Día de los Muertos* (the day of he dead), thus, embracing the cultural value of maintaining and nurturing Latino heritage (Hidalgo, 1998; Novas, 1994).

Latinos "share many commonalities with African American and American Indians families whereas they differ considerably from non-Hispanic White and Asian families" (Ortiz, 1995, p. 19, as cited in Zambrana, 1995). However, Latinos have unique behavioral and social characteristics (e.g., cultural values) that make their own set of customs and traditions different from mainstream America (Spring, 2001). They are: (a) sense of pride, loyalty, respect and commitment to family and heritage; (b) high emphasis in cooperation and team work than individualism and competition; (c) strong sense of directness and frankness in communication style; (d) high regard for spirituality, individual dignity, and authority figures; (e) ample concern with gallantry, courtesy, charity, and courage (Bernal & Knight, 1993; Griggs & Dunn, 1996; Knight et al., 1993).

Latinos have a strong sense of pride, loyalty, respect, and commitment to family and heritage. An individual's self-confidence, worth, security, and identity are determined by his/her relationship to family and other family members (Bernal & Flores-Ortiz, 1982, as cited in Ho, 1987; Zambrana, Dorrington, & Alonzo Bell, 1997). Thus, individual attitude and actions towards family and heritage manifest the sense of pride, loyalty, respect, and commitment. Further, Latinos have a high sense of respect for hierarchy, which is manifested by the leadership structure of the family. For example, the father occupies the role of superior authority and the mother's role follows. Younger children are expected to obey older children who serve as role models (e.g., father or mother figures) (Ho, 1987).

Latinos have higher emphasis on cooperation and teamwork than individualism and competition. For example, a core value of Latino culture is to cooperate, to be a team player, to give, to make sure everyone is together, and to be collective. Individuals with higher sense of competition and individualism over collective effort are seen as having an incorrect or unacceptable social behavior, thus may be labeled selfish (*egoísta*), and cannot be trusted (Griggs & Dunn, 1996; Ho, 1987).

Latinos have a strong sense of directness and frankness in communication. Latinos are very open about their feelings, and emotions, and tend to communicate them in ways that may be seen by mainstream America as "too passionate/emotional" (Griggs & Dunn, 1996; Ho, 1987).

Latinos have a high regard for spirituality, individual dignity, and authority figures. Latinos celebrate life (Novas, 1994). They emphasize spiritual values as the core cultural value. For Latinos, the value of the spirit and soul are more important than the body and the worldly materialism. For example, Latinos tend to think in terms of transcendent qualities such as justice, loyalty, and love to address fatalism (Griggs & Dunn, 1996; Ho, 1987).

Latinos tend to be concern with gallantry, courtesy, charity, courage, and show "respeto" (respect), and "cortesía" (courtesy). Someone who does not have these social behaviors may be called "*mal educado*" (bad educated). The social behavior of Latinos is to be very courteous and complementing to others. Latinos have a high regard for friendship (*amistad*) (Griggs & Dunn, 1996; Ho, 1987).

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Further, Latinos are taught that enduring sickness is a sign of strength (Schur et al., 1988, as cited in Brice 2001).

In a nutshell, the unique behavioral and social characteristics of Latino cultural values that make each sub-group embrace a common set of customs and traditions is exemplified by the common bond of both Spanish-speaking as well as Spanish colonization history (García, 2002; Gracia, 2000). Through history, Spanish-speaking countries have passed on Spanish customs and traditions unique to Latinos. Despite the diversity of customs within each specific Latino nationality, each sub-group displays common behavioral and social characteristics based on its shared experiences and historical backgrounds (Trueba et al., 1995). Thus, these shared experiences and historical backgrounds address the emergence of a collective social identity of Latinos in the U.S. (García, 2002; Gracia, 2000; Zambrana et al., 1997).

Summary of Culture and Latino Culture

According to Trueba et al. (1993), culture is a dynamic process with activities for the transmission of survival skills and the rationale for using those skills. Cultural values are transmitted but linked to shared values. Therefore, the similarities or common characteristics among diverse Latino sub-groups as a common culture (i.e., specifically, for newcomers) reflect a secondary socialization process into a new common culture. Thus, culture is rediscovered (Trueba). In this rediscovery of culture, Latino cultural values (e.g., common shared cultural values) are processed and transmitted in a transactional or interactive process that aims at sharing cultural

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capital (e.g., knowledge, traditions, and values) among all Latino sub-groups living in the U.S. (Hidalgo, 1998; Trueba et al., 1995).

Moreover, cultural values become transferable from one group to another based on the influence of common values of the Latino cultural force that have a popular character (Morales Benítez, 1999; as cited in Zea & Magallón, 1999). For example, Morales Benítez found that the popular character among Latinos is reproduced by the commonalties of proverbs (*proverbios*), stories (*cuentos), sayings or short stories (dichos*), songs (*canciones*), dances (*danzas*), music (*música*), mythology (*mitología*) among other cultural legacies of the conquistadors like the language, Catholic religion, Spanish medieval and renaissance architecture (Zea & Magallón). Subsequently, cultural processes of the adaptation of Spanish rules mixed with Indian and African beliefs, dances, songs, rhythm, related to land, agriculture, fauna, food, housing, clothing, artifacts (e.g., *hamaca, canoa*), literature, and education to facilitate the elements of a common Latino culture (Larrain, 2000; Novas, 1994). Therefore, the mix of cultures prevalent in Spanish-speaking countries evokes a social meaning of ideologies that connect with each other in a collective identity that gives birth to Latino culture as an amalgamate of sub-cultures (Chahin, 1993; Darder et al., 1997; García, 1997; Morales Benítez, 1999, as cited in Zea & Magallón, 1999).

The emergence of common cultural characteristics among Latinos despite their heterogeneity is perhaps explained by the empowerment of a homogeneous cultural identity (e.g., Hispanic Americans and/or Latinos), which projects as a

collective ethnic group identification and classification (Trueba et al., 1995). For Latinos the question of social identity follows an ethnic consciousness in the attempt to obtain social mobility in the U.S. (Stevens-Arroyo, 1994; as cited in Dolan & Figueroa Deck). Further, the rise of Latino identity is a brotherhood of identity (Duignan & Gann, 1998) within the concepts of assimilation, acculturation, bi-culturalization, and self-identity experience among Latino sub-groups in the U.S. (Dolan & Figueroa Deck, 1994; Duignan & Gann, 1998; Rosaldo & Flores, 1997).

Identity and Acculturation Theories/Arguments

Who am I? The concept of identity relates to "all that we are" (Banks, 2001, p. 54). Through identity, we define ourselves in relation to 'self' and 'others.' Blumer (1972) stated, "the capacity of the human being to make indications to himself gives a distinctive character to human action" (Blumer, 1972, p. 77). To this end, individuals confront the world, guiding their actions by their identity (e.g., cultural, ethnic, national, global) (Blumer). In this section, I provide an overview of identity and acculturation through the following topics: (a) definitions of identity and cultural identity - ethnic, national, and global identity; (b) overview of culture, ethnicity and identity theories and arguments; and (c) importance of understanding identity and acculturation. The purpose of this review is to outline Latino cultural identity interwoven by the acculturation theories and arguments that illustrates the condition of Latinos in the United States.

Definitions of Identity and Cultural Identity – Ethnic, National, and Global Identity

The study of identity opens a dynamic and continuous multidisciplinary dialogue that has concerned scholars for centuries. Evolving from disciplines such as anthropology, communication, education, history, philosophy, psychology, religion, sociology, and social sciences, the search for meaning of self (e.g., identity and recognition of ethnic and cultural diversity) has encompassed the numerous conceptions of identity (Banks, 2001; Fitzgerald, 1993; Moya, 2002; Murray Thomas,

2001; Segall, Dasen, Berry, & Poortinga, 1999). Consequently, the discussions defining identity have brought multidisciplinary constructs of meaning within the pervasive theme of 'construction.'

As a result, human beings have and continue to construct meaning of 'selves' to fit as well as to determine the identification of 'self' within their own environments (e.g., cultures, gender, race, sexuality) (Banks, 2001; Fitzgerald, 1993; Moya, 2002; Murray Thomas, 2001). Multidisciplinary discourses of "what is identity" have evolved across all academic boundaries creating transdisicplinary philosophical views (e.g., typologies, theories, assumptions, and models of identity) related to their fields. Rudmin (2003) posits that there are a myriad of labels and meanings across disciplines, thus "repeatedly reinventing theories… acquiring different, sometimes contrary meanings" (p. 16). Thus, it is complex to recognize the wide-range of identity topics, simultaneous meanings as well as multi-dimensional and overlapping definitions, which increase the dilemma of the study of identity. In this section, I provide the following transdisicplinary definitions central to acculturation processes: (a) identity, (b) cultural identity and ethnic identity, and (c) ethnic, national, and global identity.

Identity. "Identification is a social-psychological process involving the assimilation and internalization of the values, standards, expectations, or social roles of another person or persons… into one's behavior and self-conception" (Theodorson & Theodorson, 1969, as cited in Banks, 2001). Thus, "identification is an evolving,

dynamic, complex, and on-going process and not a static or unidimensional conceptualization" (Banks, 2001, p. 54).

Further, "Identity is defined as the academic metaphor for self-context…." (Fitzgerald, 1993, p. 18). Through the context of identity, culture is viewed as a communicable knowledge that helps individuals cope with a particular environment (Banks, 2001; Fitzgerald, 1993; LaFromboise, Coleman & Gerton, 1993; Moya, 2002). In this sense, culture is passed from generation to generation, hence "reducing culture to identification" (Fitzgerald, 1993, p. 19). Therefore, the recognition of the self" as an identity (e.g., anthropologist philosophical view) is "biologically based but ultimately symbolically transformed by culture" (p. 26) that further contributes to human adaptability, survival, and well-being (Banks, 2001; LaFromboise et al, 1993; Ryder, Alden, & Paulhus, 2000; Suh, 2002).

In defining identity, the concept of culture helps us to understand the diversity of human nature and address "self" identification (Alexander & Seidman, 1990; as cited in Fitzgerald, 1993). According to Fitzgerald, the environment shapes the individual definition of self, which is mediated and influenced by the multiple experiences (e.g., country of origin, host country, language, culture, ethnicity, race, gender) that grounds self-identity. Therefore, these experiences are embedded in cultural and social constructed beliefs and values influenced by the many dimensions of identity (i.e., define 'self' as 'enduring self,' 'situated self,' and 'endangered self') through the concepts of ethnic and cultural parameters (or boundaries or foundations) of humanity within a society (Banks, 2001; Fitzgerald, 1993; LaFromboise et al.,

1993; Moya, 2002; Suh, 2002; Trueba et al., 1993; Yinger, 1994). Trueba et al. state that there multiple dimensions of self within the construct of identity based on Sprindler's concept of 'enduring self' as it refers to the construct of self that is "built during the early socialization stages and it is retained by the individual for life", or 'situated self' as it refers to "the construct of self that is constructed in the effort to adjust to new settings… reflects the changes resulting from new settings with diverse cultural values and life style" (p. 145). Banks (2001) refers to an 'endangered self' as it refers to a definition of self in order to survive.

Central to the equation of identity is the dynamics and dimensions of self-identification which schemes the complexity of whom we are – the 'self.' Trueba at al. (1993) posits that 'enduring self,' 'situated self,' and 'internal self' are natural processes of personal identification which focus on adaptation strategies linking identity and culture through the bridges of acculturation or deculturation. Furthermore, the process of adaptation calls for 'endangered self' as personal identification of survival and well-being (Fritzgerald, 1993). These dynamics become processes that illustrate multiple domains (i.e., cultural, economic, political) (Trueba et al., 1993), which are discussed in the acculturation section of this review.

Cultural identity and ethnic identity. The theoretical framework for the concept of cultural identity theories related to ethnicity defines cultural identity as "an individual's subjective conception of self in relationship to a cultural group (Reber, 1985, as cited in Banks, 2001, p. 128). For the purpose of this research, ethnic identity is defined as "a construct that may be of central importance in understanding

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the acquisition of social behaviors that are based on the ethnicity of the individual, or ethnically based behaviors. These ethnically based behaviors may well be the result of the development of ethnic identity through socialization and cognitive development" (Knight, Bernal, Cota, Garza, & Ocampo, 1993, p. 105). Thus, ethnic identity is "a set of self-ideas about one's own ethnic group membership" (p. 105).

For example, Latino cultural identity is socialistic. Family is central and takes precedence over any outside concerns. Therefore, family members embrace cooperation and not competition. In this way, Latino culture posits a more collective cultural behavior and value, seeing individualism as a negative social behavior (Ávila & Ávila, 1988; Sandoval & De La Roza, 1986). Furthermore, Latinos cultural behavior is embedded in *personalismo* (personalism) and *simpatía* (sympathize) (Triandis, Marín, Lisansky, & Betancourt, 1984; Zambrana, 1995; Zambrana et al., 1997). Individuals relate to each other in terms of warm, emotional fashion, with a need to trust people, while valuing humanism and personal uniqueness (Ávila & Ávila, 1988; Padilla, 1985a, 1985b).

An ethnic group is "a group that shares a common ancestry, culture, history, tradition, and sense of peoplehood" (Banks, 2001, p. 78). According to Banks, there are different types of ethnic groups (e.g., cultural ethnic, economic ethnic, political ethnic, holistic ethnic) through the multidimensional concept of ethnic group membership (e.g., the physical characteristics and behaviors within the variables of individual's psychological identification or ethnicity). Additionally, Banks explains that a cultural ethnic group is an ethnic group that has a common set of values,

experiences, behavioral characteristics, and linguistic traits that differentiate them from other ethnic groups (Triandis et al., 1984). Consequently, individual membership to a cultural ethnic group is usually gained by birth or early socialization processes (Banks). Ávila and Ávila (1988) state that Latinos have high value for cultural pride. Thus, Latino sub-groups tend to have high esteem for their closeness to their country of origin or upbringing and language (Bernal & Knight, 1993; Massey et al., 1995).

Ethnic, national, and global identity. The relationship with identity and culture is addressed by a typology of cultural identity based on Banks (2001). Banks establish that cultural identity is differentiated in four stages: personal identity, global identification, national identification, and ethnic identification which describes the nature multiple identification of "self." He contents that these stages of identification are interrelated into our own environments (i.e., collective and individual connection to identity) on the basis of "belonging" (e.g., gender identification, family identification, racial identification, ethnic identification, cultural identification).

Personal identity is "the 'I' that results from the lifelong binding together of the many threads of a person's life. These threads include experience, culture, and heredity, as well as identifications with significant others and many different groups such as one's ethnic group, one's nation, and the global community" (Banks, p. 59). For example, an image of self as "self" identifying as a human being within the own construct of personality, physical and biological structures (Murray Thomas, 2001). Because the notion of 'self' varies from culture to culture, beliefs about ourselves are

founded by cognition or self-knowledge of who we are, and where we belong to in our own terms (Murray Thomas, 2001; Oboler, 1995).

Global identification relates to the awareness of global aspects in which the individual see self as a citizen of the world (Banks, 2001). However, global individual identity relates to the connection of personal self-knowledge in the construct of interconnection with the world. Through forging a global identity, the conceived state of intercultural relations in which common values emerge as a form of global membership and identification become embedded of a reflective knowledge of self as part of the global ideology (Segall et al., 1999). An example is seeing 'self' as part of the global context and identifying with global beliefs of justice, human dignity, and equality (Banks, 2001).

National identification is drawn by the shared national values and ideals in which individuals can relate to ethnic allegiances and characteristics that endorse a national concept related to citizenship and its membership (Banks, 2001). An example is the participation of a national solidarity and reflective nationalism that shapes the notion of citizenship through the identity of nationalism. This is demonstrated in the 9/11 terrorist attacks to the U.S., and how it inspired the community to pursue a national interest against terrorism, thus defending national values and beliefs (e.g., as part of national identification). Another example is the ideal of an American culture as a national identification of all U.S. citizens from different ethnic and cultural backgrounds embracing a national concept of culture – Americanism. Thus, this new created culture (Oboler, 1995) mixed all immigrants

and ethnic cultures during the previous centuries in the belief of a national identity

formation (i.e., endorsing shared national values and ideals) coined in 1909 (e.g.,

melting pot) (Spring, 2001).

Ethnic identification relates to the ethnic affiliation and characteristics of the

individual's self-concept of their own ethnicity (i.e., African American,

Latino/Hispanic, Asian/Pacific Islander American, Native American/Alaskan Native)

(Banks, 2001; Oboler, 1995; A. Padilla, 1980). For example, ethnic self-identification

based on the basis of birth, or self selection (e.g., socialization dynamics) (Knight et

al., 1993). Therefore, "ethnic identity is a set of self-ideas about one's own ethnic

group membership" (p. 105). Specifically, Latinos ethnic identity is driven by country

of origin (Marín & Marín, 1991). Thus, Latinos will identify by place of birth or

upbringing (e.g., Puerto Rican, Mexican). For structural factors, Latinos, then change

their identity in the U.S. to identify themselves as a community (e.g., Latinos,

Hispanos, La Raza) (García, 2003). Furthermore, it establishes a sense of

mobilization, power, and unit among a heterogeneous group (Marín & Marín, 1991,

García, 2003; Moya, 2002; Zambrana & Zoppi, 2002).

Overview of Culture, Ethnicity and Identity Theories and Arguments

There are various theoretical perspectives that address culture, ethnicity and identity in terms of answering: Who am I? How do I relate to my culture and others? How do members of cultural groups relate to others? (Banks, 2001; Bernal & Knight, 1993; Hofstede, 2001; Ward, Bochner, & Furnham, 2001). Other questions that inform culture, ethnicity and identity are: "Is it of value to maintain my cultural heritage? Is it of value to maintain relations with other groups?" (Berry, 1997; as cited in Ryder et al., 2000, p. 50).

Empirical research dated back 1929 to mid 1960s to present, highlights culture, ethnicity, and identity within four levels of analysis from the disciplines of psychology (individual's emotional and behavioral characteristics), education (relationship with human social structures), sociology (groups and diverse socioeconomic systems), and ethnology (cultural heritage) (LaFromboise et al., 1993). Based on the literature, there are two major approaches that bridge the multidisciplinary discourse of culture, ethnicity, and identity. The following approaches answer the above stated questions: (a) acculturation models and measurements, and (b) social identity theory. However, through the lenses of the multidisciplinary discourse, such theories showed varied and inconsistent terminology (e.g., typologies, assumptions, arguments, claims, approaches, models, conceptual schemes, paradigms, frameworks or ideologies) (LaFromboise et al., 1993; Rudmin, 2003; Segall et al., 1999; Ward, Bochner, & Furnham, 2001) that

establishes different context of theoretical constructs based on culture, ethnicity and identity.

Consequently, there are numerous versions of theories based on the field of study. For example, in psychology, there are four typologies of acculturation that address culture, ethnicity and identity: (1) assimilation, (2) separation, (3) integration, and (4) marginalization (Berry, 1997, as cited in Rudmin, 2003) whereas LaFromboise et al. (1993) established that there are five models of second-culture acquisition or bi-culturization (e.g., related to culture, ethnicity and identity): (1) assimilation, (2) acculturation, (3) alteration, (4) multiculturalism, and (5) fusion, which is addressed in the bi-culturization section of this review of the literature.

Second-culture acquisition empirical data show multiple synonyms: cultural interactions (e.g., biculturalism, dualism, pluralism, transactionalism, acculturation), descriptors of membership (e.g., microculture, macroculture, minority, majority), psychological symptoms (e.g., depression, anxiety, stress, well-being) and outcomes associated with second culture acquisition (e.g., competence, achievement, health) (Arredondo, 1991; Banks, 2001; LaFromboise et al., 1993). Suffice to say that the terminology is conflictive, and models, typologies, theories and assumption are interrelated. Therefore, the complexity of the constructs of culture, ethnicity, and identity emphasizes unconnected academic scholarship and the systematic creation of ideologies across disciplines without cross communication (Rudmin, 2003). In this review, I will use LaFromboise et al. (1993) models of second-culture acquisition/bi-

culturalism in terms of culture, ethnicity, and identity (e.g., since it is difficult to compare competing theories) (Rudmin, 2003).

Acculturation models and measurements. J.W. Powell first used the word acculturation in 1880 in order to describe Native American languages. In 1898, sociologist W. J. McGee defined acculturation as a process by which "devices and ideas are interchanged and fertilized in the process of transfer" (Rudmin, 2003, p. 243). According to Rudmin (2003), the vocabulary of acculturation is impossible to standardize because it extends across various academic disciplines, across decades, and across national boundaries, "acculturation is an ancient and probably universal human experience" (p.8). Further, he argued, "acculturation is a normal, universal process that occurs regardless of minority or majority status" (p. 25). Subsequently, the process of learning and behaviorally adapting to a new culture is labeled "acculturation" (Marín & Marín, 1991).

Berry (1980) proposed that individuals under go a process of change when in contact with another culture. He established that individuals' psychological functioning such as language, cognition, personality, identity, attitude, and stress (e.g., conflict or crisis) enter different stages in which an individual(s) attitude becomes conditioned by the environment (i.e., adapt, assimilate, integrate, reject) and the new culture (Banks, 2001; Berry, 1980; Padilla, 1980; Marín & Marín, 1991; Ryder, Alden, & Paulhus, 2000).

In terms of language, the individual(s) become inter-related with own and host cultural language (e.g., bi-lingual, monolingual) thus, shifting to new language, or

maintaining own language (Berry, 1980, Padilla, 1980). However, the process of language acculturation relies in language preference (Brice, 2001), ability, and sociodemographic characteristics (e.g., length of residence, age of arrival, contact with own cultural values, beliefs, and language usage) (Marín & Marín, 1991). For example, "language loss has been considered by many to be part of the natural Americanization process" (Evans, 1996, pp. 177-178, as cited in Weisskirch & Alatorre Alva, 2002). For Latinos, language is central to culture (Brice, 2001; García, 2001; García, 2003; Puig, 2001). Therefore, language binds together identity and acculturation within the construct of adaptation (e.g., bilingual programs) to U.S. society (Puig, 2001; Weisskirch & Alatorre Alva, 2002). Specifically, Latino history textbooks, and curriculum is essential to both identity and acculturation, as it impacts both culture and language within the Latino community living in the U.S. (Gracia, 2000; Novas, 1994).

Because the process of acculturation is complex and dynamic, individual(s) cognition and social environment is influenced by own behavior and cultural competence (Bandura, 1986; LaFromboise et al., 1993). LaFromboise et al. (1993) established that the behavioral model of culture suggests that:

"In order to be cultural competent, an individual would have to (a) posses a strong personality, (b) have knowledge of and facility with the beliefs and values of the culture, (c) display sensitivity to the affective process of the culture, (d) communicate clearly in the language of the given cultural group, (e) perform socially sanctioned behavior, (f) maintain active social relations

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within the cultural group, and (g) negotiate the institutional structures of that culture." (p. 396)

Ryder et al. (2000) suggested two models of acculturation: unidimentional (i.e., cultural identity change over the period of time in which acculturating individuals relinquish their attitudes, values and behaviors from their culture of origin or cultural heritage[4] while simultaneously adopting those of the new culture) and bidimensional (i.e., individuals identity is preserved while adapting the values and behaviors of the mainstream[5] culture) (Dion & Dion, 1996). Ryder et al., established that the bidimentional model of acculturation is "more valid and useful operationalization of acculturation" (p. 49). This argument is based in the following premises: (1) the unidimensional approach provides an incomplete and misleading picture of acculturation based on its failure to consider alternatives to assimilation, emergence of integration, and biculturalism; and (2) the bidimentional approach provides empirical evidence that encompasses an acculturation process that identifies with four distinctive acculturation strategies (e.g., integration, assimilation, separation, and marginalization) (Berry, 1980; Dion & Dion, 1996; Ryder, at al., 2000).

Across disciplines, the growing body of literature addressing the constructs of self in relation to the individual's whole person (i.e., behavior, psychology, education) and its responses to the environment provides the connection between one's culture and other's culture as independent and autonomous. In Berry's

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[4] Cultural heritage refers to culture of birth, of origin, or upbringing (Ryder et al, 2000).
[5] Mainstream culture is the predominant cultural environment (Ryder et al., 2000).

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acculturation model, individuals make unique decisions about 'self' in relation to their

environment. Thus, individuals' acculturation strategies are chosen and

conceptualized by individual's adoption of, so to say, *integration* (e.g., endorsing

intergroup relations while maintaining own culture), *assimilation* (e.g., adopting new

culture set of beliefs and values while abandoning own cultural heritage); *separation*

(e.g., maintaining own cultural heritage without intergroup relations); and

marginalization (e.g., omission of old or new culture) (Ryder et al., 2000).

Furthermore, the acculturation model suggests the cultural value dimension of

'the self' focus on the self-identity as an individual and as a group of individuals (e.g.,

detach from self). This cultural value dimension is called individualism-collectivism

(Hofstede, 1980; as cited in Ryder et al., 2000). Through individualism, emphasis is

exerted in the individual, whereas through collectivism the emphasis is exerted on the

group (Ryder et al.).

Nevertheless, the acculturation model purports that an individual will respond

in an individualistic or collectivistic manner based on personal cultural value. For

example, some cultures like Mexican have strong collective behaviors embedded in

their cultural value, whereas some cultures like Americans, Australians, and English

have stronger independent cultural behaviors. According to a statistical study

conducted by Hofstede, the index of individualism of United States is 91, Australia is

90, and Great Britain is 89, whereas the index of individualism of Mexico is 30

(Hofstede, 1980, 1983; as cited in Ward et al., 2001, p. 12). In reviewing Hofstede's

individualism indices of 50 countries, most of the Spanish-speaking countries show

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51 or lower indices of individualism. Therefore, culture is embedded in the aspects of how individuals see themselves in relation to others (Hofstede, 2001).

Thus, it is noteworthy to speculate the outcome of the dynamics of acculturation to self-identity and group-identity. Consequently, empirical data provide evidence of the mental health outcomes produced by acculturation processes in individuals. Berry (1996) concluded that marginalization leads the worst outcomes in mental health whereas integration leads to better mental health consequences. However, assimilation and separation outcomes in mental health were "in between."

Additionally, Berry (1996) noted that in studying psychological well-being of an individual, cultural heritage and mainstream culture identifications must be given separate considerations in order to obtain a richer picture of the individual acculturative stress and adjustment. For example, Ward et al. (2001) established that "identification with culture of origin is associated with better psychological adjustment while identification with contact culture is linked to better sociocultural adaptation" (p. 111). Thus, mental health outcomes as well as consequences of acculturating or acculturated individuals may reflect personality traits that maybe preexisting, developing, or constructing through their relationship with their environment, thus identities may vary independently (Ryder et al., 2000).

Social identity theory. Proposed by Tajfel in 1978, the social identity theory (SIT) studies the role of social categorization, and social comparison in relation to self-esteem, and group membership for individual identity. Tajfel (1978) argued that SIT provided meaning of (1) concept of self, (2) awareness of group membership, and

(3) evaluation and emotional significance. Because SIT emerged from personality theory (e.g., social psychology) within the contexts of social identity and intercultural contact, it emphasized the cognition of self, which is significant for minorities, immigrants, migrants, tourists, and members of non-dominant groups (Ward et al., 2001). Further, it provided a framework for understanding the psychology of culture and culture shock, specifically perceived discrimination, prejudice, stereotype, as well as group responses within their new societies and host nations (e.g., immigrants, sojourners, refugees) (Ward et al.).

Tajfel (1978) postulated that self-esteem with motivational purpose provided positive self-enhancement through belongingness, status, and distinctiveness. Individuals use social strategies to establish, maintain, or restore self-esteem when faced with unfavorable group identity. Therefore, self-esteem and esteem enhancement are central to positive or negative outcomes that are essential to cultural identity maintenance (LaFromboise et al., 1993; Ward et al., 2001). Thus, inter-group bias, stereotypes, attributions, and favoritism are inevitable consequences of social identification and intercultural contact. Further, out-group derrogation increased when group identity was threatened whereas in-group identification increased when individual identity was threatened. For example, migrants and other minorities in response to derogatory stereotypes, discrimination and other prejudices may adopt a variety of social identities to restore self-esteem. Therefore, members of minority groups have a higher tendency for group identification than members of dominant groups.

SIT provided a foundation to the understanding social identity threats to

individual mobility, creativity, and social competition in terms of culture, ethnicity,

and identity. It highlighted the importance to understanding culture, ethnicity, and

identity in the formation of self and others, strategies to overcome threats to identity,

and aspects of cultural social behavior within group comparison that are important to

approaching culture diversity. Specifically, SIT posits that members of disadvantaged

groups may adopt assimilation strategies to pass as members of the dominant culture

in order to adapt, overcome, or survive in their environments (Ward et al., 2001).

Because perceived discrimination varies across groups and individuals, perceived

discrimination is associated with the unwillingness to adopt the host culture identity

(Mainousm 1989, as cited in Ward et al.).

Bi-culturization/second-culture acquisition. There are multiple perspectives of

the term bicultural which have been employed to refer to acculturation that involves

the individual in contact with two cultures (LaFromboise et al., 1993; Padilla, 1994;

Segall et al., 1999). Thus, models of second-culture acquisition have been established

to explain the process of change that occurs in modification, transition, adjustment

and evolution within, between, and among cultures (LaFromboise et al., 1993).

Across disciplines, there are many models, theories, typologies, and frameworks that

explain biculturization and second-culture acquisition. However, in this review, I use

LaFromboise's second-culture acquisition models. According to LaFromboise et al.,

there are five models of second-culture acquisition (e.g., related to culture, ethnicity

and identity) which are as follows: (a) assimilation, (b) acculturation, (c) alteration, (d) multiculturalism, and (e) fusion.

The *assimilation model* refers to circumstantial continuous process of absorption into the second culture that has been established as dominant or more desirable culture. The goal of this model is to obtain acceptance to or membership to the new culture, through a process shaped in various stages (Gordon, 1964, 1978, as cited in LaFromboise et al., 1993). These stages are as follows: cultural, structural, marital, identificational, attitudinal, behavioral receptional, and civic assimilation (H. Garza, 2001; Y. Garza, 1996; Knight et al., 1993; Lowe & Gardner, 2001; F. Padilla, 1985b; Pérez et al., 1997; Walsh, 1991).

Empirical data show that through these processes, the individual suffers cultural stress, anxiety, confusion, isolation, alienation, and identity crisis in anticipation of acceptance or perceive acceptance of the second culture (Banks, 2001; Bernal & Knight, 1993; LaFromboise et al., 1993; Segall et al., 1999; Suh, 2002; Ward et al., 2001). As a result, the individual is faced with social problems (i.e., school failure, substance abuse) due to a sense of powerlessness embedded within, between and among the lack of support that the individual has gradually lost from the original culture while in transition to acquire acceptance to second culture. Thus, the assets of the newly acquire culture are not yet established (Hofstede, 2001; LaFromboise et al., 1993; Maslow, 1968; Ogbu & Matute-Bianchi, 1986).

The model suggests that the assimilation process is best when the individual develops a new cultural identity while aware of its consequences. LaFromboise et al.

(1993) described the following major effects: (1) being rejected by members of the new culture (i.e., dominant, majority culture, desirable culture), (2) being rejected by members of their own culture (i.e., culture of origin, culture of upbringing, culture of identity), and (3) being in cultural stress, and conflict while navigating the process of assimilation into the new culture.

The *acculturation model* focuses on full acceptance and membership of the second culture. Specifically, this model strives to achieve full participation in the majority culture by identifying as a member of the minority culture (LaFromboise et al., 1993). Models of acculturation such as alteration, multicultural, and fusion focus on "changes" within the individual and the environment, specifically "coping mechanisms." For instance, the *alteration model* proposes that an individual has the potential or the ability to alter (i.e., mold, adjust, modify) his or her behavior to 'fit' (i.e., gain access) to a particular social context (LaFromboise et al., 1993).

Ogbu and Matute-Bianchi (1986) posited that individuals alter their behavior in order to simultaneously function in two different cultures and languages (e.g., own culture and host culture) while fitting in within a particular situation (e.g., culture, language) (Ramírez, 1984; as cited in LaFromboise et al., 1993). Therefore, the acculturation model focuses on the degree to which individuals affiliate with cultures of origin and second culture, and how this impacts the individuals, communities, and the overall society.

The *multicultural model* posits that cultures can co-exist in relationship with each other by promoting a pluralistic approach (Banks, 2001; LaFromboise et al.,

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1993, Trueba, 1999). Through a multicultural society, the individuals are encouraged to maintain group identity and to develop inter-group acceptance and tolerance, intergroup relations, and multicultural as well as multilingual knowledge (Segall et al., 1999). Thus, this model addresses a process in which society engages with individual preferences while evolving into a cross-cultural society (1997; Berry, 1980).

The *fusion model* refers to the assumption that cultures can melt together (e.g., melting pot theory). It suggests that individuals' cultures within the overall society will fuse together by sharing economic, political, or geographic space. Thus, individual cultures become indistinguishable structures to form a new common culture (Gleason, 1979, as cited in LaFromboise et al., 1993). Consequently, dominant cultures assimilate other cultures (e.g., minority cultures, non-desirable cultures) leaving these cultures indistinguishable (Ogbu & Matute-Bianchi, 1986).

Importance of Understanding Identity and Acculturation

The role of identity is central in the interconnection of both culture and ethnicity (Fitzgerald, 1993). To this end, "culture is conceived of as the context in which people derive a sense of who they are, how they should behave, possibly where they are pointed in the future" (Collier & Thomas, 1988, as cited in Fitzgerald, 1993, p. 59). Therefore, identity is an adaptive and mediating process of human behavior (Fitzgerald, 1993). Culture, like identity, "is an evolved human characteristic that potentially contributes to our survival" (Fitzgerald, 1993, p. 29), and well-being (LaFromboise et al., 1993; Suh, 2002). Therefore, by understanding identity, we connect with our own understanding of culture and ethnicity.

For Latinos, identity and culture are interrelated with ethnicity, race, and nationality. Specifically, through an acculturation process Latinos in the United States share a bi-cultural identity, Spanish language, and cultural citizenship (Hidalgo, 1998). "Latinos give culture a central place in defining their identity, relationships with the world, and the sense of rights" (Silvestrini, 1997, p. 40, in Flores & Benmayor). Latinos perceive community within a connection of common heritage (i.e., *lazos de razas Latinas*). More specifically, "culture gives us a sense of unity, of connectedness, a vision of our identities" (Silvestrini, p. 43). Consequently, Latino communities in the United States claim for a cultural citizenship (e.g., Race pride and American identity based on maintaining cultural heritage) distinct from a legal citizenship (i.e., U.S. Permanent Resident, U.S. Citizen) (Hidalgo, 1998; Flores & Benmayor, 1997; Pérez-Torres, 2000; Portes, 2000, Rhea, 1997).

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Silvestrini argues that cultural citizenship is central to Latino sense of participation in American society and to self-identity (e.g., be both Latino and American). Rosaldo and Flores (1997) posit that cultural citizenship conceptualizes the claim of democracy through a process of membership within a full enfranchisement of perceived elements of dignity, well-being, and respect. For example, cultural citizenship grounds Latino cultural capital as "funds of knowledge" of their own cultural codes (Benmayor, Torruellas, & Juarbe, 1997). Pérez-Torres (2000) argues that the term *Latinidad* refers to Latino identity (e.g., Latinoness) that addresses all Latino sub-groups into a *mestizaje* (i.e., racial and ethnic mixing) (Rodríguez, 2000). Therefore, the contexts of Latino identity affirmations (e.g., under the umbrella of Latino, Hispanic, Chicano, La Raza) serve as a vehicle for claiming cultural citizenship in the United States (Silvestrini, 1997).

The constructs of acculturation, biculturalism or second-culture acquisition rely on the bicultural competence in two cultures (Banks, 2001). Through these acculturation models, we can understand the many dynamics and processes in which individuals acquire a second culture. In this way, cultural competence provides the societal well-being to establish cultural relationship within, between, and among multiple groups in their struggles to maintain cultural, ethnic, and self-identity within the overall society (Portes, & Rumbaut, 1996). It is then fair to establish that "cultural competence requires a substantial degree of integration" (e.g., integration to the host or dominant culture) (Burnman et al., 1987, as cited in LaFromboise et al., 1993). However, particular attention is then given to the assumption that identity

development does not happened in a vacuum, thus the evolution of cultures within society involves processes of societal well-being and human relationship. Therein, since human nature is universal, the construct of the overall society relies on a pluralistic view of humanity as members of different ethnic groups. Through our own individuality, we find our own sense of belongness, and therefore, personal well-being (Alder, 1975).

Latinos often feel like "second class citizens" having their rights denied and opportunities accorded to White non-Latino Americans (Rosaldo & Flores, 1997). However, the perceived notion of full participation (e.g., full citizenship) is re-established by cultural competence within Anglo-cultural codes (i.e., individualism, competition) gained through acculturation processes (Cabassa, 2003; Flores, 1997; Hidalgo, 1998; Sandoval & De La Roza, 1986; Spring, 2001). More specifically, "acculturation entails the social and psychological exchanges that take place when there is continuous contact and interaction between individuals from different cultures (Cabassa, 2003, p. 127).

For example, Latinos often struggle with "bounded ethnically homogeneous space" (Flores, 1997, p. 125) that constraint them socially, economically, educationally, and politically participating as members of the overall U.S. community (Spring, 2001). Latino communities are segregated into *barrios* (e.g., geographical sectors of non-white communities) with pockets through, between and among cities, suburban and rural neighborhoods. Thus, segregated within marginalized communities across the nation, Latinos often feel like "*como basura*" (e.g., like trash)

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and "*como animales*" (e.g., like animals) as the standard of justice reflect a "second-class" status of citizenship (Flores).

Pérez-Torres (2000) stated that, "Latinos are constantly told that demographically they are the future of this country, even as many are systematically denied that future. Latinos are promised that as a group they, somehow, will serve as redeemers of future generations" (p. 551). But, how can Latinos be the future? For instance, Padilla and Chávez Chávez (1995) posit that Latino professors in American universities often struggle to negotiate the academic life of higher education. In their own stories of survival, Latino professors illustrate the academic cultural terrain bounded to cultural, racial, gender, and class manifestations different from those of Latino culture. Thus, the process of Latino acculturation into the academic world is exemplified by the metaphor 'a leaning ivory tower' characterized by isolation, and marginality (Haro, 1995; Padilla & Chávez Chávez, 1995). Haro (1995) argues that Latinos are held to a higher standard for executive selection in higher education; consequently, there are limited leadership opportunities for Latinos. He stated, "It is essential for Latinos to begin questioning their limited numbers in leadership roles in higher education? The path to academic leadership roles – deans, academic vice presidents and presidents – at colleges and universities requires successful candidates to be tenured, full professors" (p. 189). To get to that point, Latinos will need much greater representation in higher education, especially doctoral programs.

For Latinos, cultural enunciation of practices, beliefs, and values provides a proliferation of aesthetics (e.g., Latino cultural expression, art, music, food, *fiestas*,

traditions) giving voice and pride to Latino identity and identity formation in the United States (Pérez-Torres, 2000). Thus, Latino cultural and social presence in the United States becomes visual in the struggle for cultural citizenship recognition while negotiating individual "self-knowledge." Purposely, "self-knowledge, then, is fundamentally social in origin" (Fitzgerald, 1993, p. 29). Through the process of socialization, culture and ethnicity are recognized through the interaction of self and others.

Padilla and Pérez (2003) argue that psychological acculturation of Latinos in the United States is established by means of the individual internal processes and experiences in direct/indirect contact with members of the host culture. Thus, value systems, developmental sequences, roles, and personality factors provide important psychological factors in the adaptation processes of the individual as a human being. Multicultural societies incorporate cultural awareness as a mutual outcome of their interactions. Thus, formulations of biases, stereotypes, and labels pigeonhole cultural groups from the mainstream culture (Padilla & Pérez).

However, the choice to acculturate varies from individual to individual based on their willingness and competence to acculturate, specifically individual preference. Moreover, education, socioeconomic, generational, and familial backgrounds as well as related personality characteristics (e.g., assertiveness, likeability, sociability, extraversion, ego control, attitude, risk taking ability, and anxiety tolerance) explain individual differences in acculturation and second-culture acquisition (e.g., biculturalism) (Pérez-Torres, 2000).

De Anda (1984) suggested that the degree of dissimilarity in physical appearances (e.g., Caribbean, Central and South American Indian or Afro-Latino) to those of the dominant culture (e.g., more European or Anglo physical characteristics) presents an obstacle in acculturation and biculturation processes. Furthermore, Gómez and Fassinger (1994) found that some aspects of Latino culture was incompatible with mainstream Anglo culture, thus making biculturalism difficult. They established,

> "Results suggested that the acculturation conflict of Latinas seemed to reside in how to negotiate their Hispanic cultural identity within highly Anglo-American society. This negotiation depended on the amount of Hispanic cultural opportunities and Hispanic acculturation pressure in their environments: The more Hispanic cultural opportunities available, the more Hispanic acculturation pressure these women felt and the more they identified with Latino culture." (p. 212)

Buriel et al. (1998) argued that biculturalism is an ideal cultural adaptation strategy for Latinos in the United States because it focuses on the strength of individuals and their value for cultural identity (e.g., characteristics of culture of origin which implies a bidimensional processes between culture of origin and dominant culture) through acculturation strategies (e.g., assimilation, separation, integration, marginalization, fusion) (Buriel, Pérez, De Ment, Chávez, & Morán, 1998; Cabassa, 2003; De Anda, 1984; Mindel, Habensteain, & Wright, 1998). In this

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complexity, pluralistic societies become cultural systems for multiculturalism (Banks, 2001; Berry, 1980; Mindel et al., 1998; Segall, et al., 1999).

Summary

Latinos are the fastest growing minority group in the U.S. and will soon be the largest minority group. However, the data reveal that they are economically poor, educationally disadvantaged, socially segregated, and politically disempowered (Haro, 1983; Llagas & Snyder, 2003; Meier, 1992; Trueba, 1999). The prognosis for improvement is poor because Latinos living in the U.S. are not represented economically, educationally, socially, and politically in positions of leadership and policy making to powerfully advocate and influence their national state (MALDEF, 1990a, 1990b). Thus, upward mobility for Latinos will be an up hill battle.

Solidarity among Latinos is complex (Trueba, 1999). Latinos are ethnically and racially divided among themselves based on their own 'self-identity' as well as social, economic, and educational differences (Olmedo & Padilla, 1978). While some call themselves Latinos and others call themselves Hispanics or even by ethnic group (e.g., Cuban, Mexican, Puertorrican), which suggest an identity divide that further reveals the difficulty of Latino solidarity based on their heterogeneity and diversity or *mestizaje* (e.g., between Hispanic/Latino multiple ethnicities, immigration status, and wide-ranging cultures such as Spanish-speaking, Native Indian, African, Caribbean) (González, 2000). Latino/Hispanic diversity is further complicated by variation of individual acculturation, which further challenges Latino solidarity and pose additional obstacles to political power, leadership, and upward mobility.

Organizational Culture Theories

The relationship between an organization and its environment is significant (Bennis, Benne, & Chin, 1961; Fullan, 2001; George & Jones, 2000; Schultz, 1995; Vaill, 1989). Overtime the construct of culture has evolved influencing the way in which organizations identify themselves, specifically function (e.g., their environment). Effectiveness and quality are said to be by products of highly goal oriented organizational structures that combine its mission with members. Thus, organizational culture focuses on "the beliefs, values and meanings used by members of an organization to grasp how the organization's uniqueness originates, evolves, and operates" (Schultz, p. 5). In other words, organizations are made of people where division of labor is specialized by skills and knowledge toward common goals in which coordination/control of actions define or establish boundaries (e.g., membership, activities) that create a purposeful culture within the collection of shared values/goals of the organization for its survival (Hodge, Anthony, & Gales, 1996; 2003).

The purpose of this review is to provide an overview of organizational culture and leadership. In this section, I address the theoretical concept of culture and how it relates to organizations and its leadership. Although there are competing theoretical views of culture and organizational culture, I focus the discussion on the structural concept of culture within organizational theory. I provide an overview of culture and organization through the following topics: (a) definitions of culture and organizational culture, (b) overview of organizational culture theories and

assumptions, and (c) importance of understanding organizational culture and leadership.

Definitions of Culture and Organizational Culture

There are numerous definitions that incrementally re-defines culture in its notion of organizational culture (Hodge et al., 2003, 1996). In this section, I briefly address specific definitions related to organizational theory.

Organization(s). Conceptually, the term organization is derived from the *Latin* word '*apparatus*' which means preparation. In its formal definition, organization has multiple meanings: "The act or process of organizing; the state or manner of being organized: a high degree of organization; something that has been organized or made into an ordered whole; something made up of elements with varied functions that contribute to the whole and to collective functions; a group of persons organized for a particular purpose; an association: a benevolent organization; a structure through which individuals cooperate systematically to conduct business; and the administrative personnel of such a structure" (The American Heritage Dictionary of the English Language, 2000). Huczynski and Buchanan (2001) define organization as "a social arrangement for achieving controlled performance in pursuit of collective goals" (p.5). Hodge et al. (2003) define organization as "human systems of cooperation and coordination assembled within identifiable boundaries to pursue shared goals or objectives." (p. 12)

Organizations consist of "tightly knit, effectively functioning social system made up of interlocking work groups with a high degree of group loyalty among

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members and favorable attitudes and trust in superiors and subordinates" (Pugh, 1984, p. 295; as cited in Hodge et al., 2003). With different levels of skills, members interact with each other creating a participatory nature of decision-making where coordinated influence and communication contribute to an efficient and an effective social system. Therefore, the purpose of the organization is to conduct measurement of organizational performance as a self-guidance, where participation and involvement are habitual processes aimed at goal accomplishment (Pugh).

However, the term organization implies that there is a division of tasks (e.g., labor) within the 'social system' (Weber, 1970). This division of labor is designed to structure the scheme of cooperation/participation in order to produce quality achievement within its members. Through the development of the organization's form, function, and structure, the system in which the organization survives becomes interrelated with the culture, which is purposely produce for mission accomplishment in a highly competitive world (Hodge et al., 2003; Muchinsky, 1997).

Culture. Originally the notion of culture was proposed by anthropologists in order to describe societies, but it is also used to describe organizations (Muchinsky, 1997). Muchinsky stated, "Culture consists of the language, values, attitudes, beliefs, and customs of an organization. It represents a complex pattern of variables that, when taken collectively, give each organization its unique 'flavor' (p. 263). Further, Firestone and Seashore (1999) point out that culture brings people together by offering ways to address issues of togetherness and community. But how culture does bring people together? Schein (1992) posits that culture brings people together

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because it becomes a pattern of shared assumptions, values and codes that maintains cultural growth and environment (Bolman & Deal, 1997; David, 1993; Deal & Kennedy, 1982; Firestone & Seashore Louis, 1999; Maslow, 1968; Schein, 1985, 1992).

Culture growth and environment. Maslow (1968) posits that "culture is sun and food and water; it is not a seed" (p. 161). In an underlying principle, Maslow associated the word culture with the process of cultivation (i.e., sun, food, water) that provides the seed the environment for growth. Thus, culture projects an industrious connection of both the environment and the various forms of growth as by product of its unique cultivation processes. Also, it implies that there is an interconnection of the environment (i.e., organization, mission, strategy, decision-making, members, climate, and its products), and how, when, why, what – of which growth occurs within.

Organizational culture. Organizational culture can be defined as "pattern of behavior developed by an organization as it learns to cope with its problem of external adaptation and internal integration, that has worked well enough to be considered valid and to be taught to new members as the correct way to perceive, think, and feel in relation to those processes" (Schein, 1985, p. 9). In this definition, organizational culture outlines the structure of the institution with its function, hence, "the forces that shape the workplace" (David, 1993, p. 171). Furthermore, Schein (1992) defines culture in the following statement:

"A pattern of shared basic assumptions that the group learned as it solved its problems of external adaptation and internal integration that has worked well enough to be considered valid and, therefore to be taught to new members as the correct way to perceive, think, and feel in relation to those problems." (p. 12)

Schein (1992) explains that there are three levels of culture, which are basic organizational behaviors within members of an institution. These levels of culture are: artifacts, espoused values, and basic assumptions. Artifacts are manifestations of an organization such as language, products, and visual objects that define its culture. Espoused values are sets of codes or principles, standards that are specific to the organizational behavior. Basic assumptions are organizational behavior guidelines for how to act. These guidelines provide continuity, permanence, and stability in organizational circumstances.

Deal and Kennedy (1982) posit that organizational culture is "the way we do things around here" (as cited in Muchinsky, 1997, p. 263). It emphasizes the fundamental framework of people's social and occupational activities that makes the organization functional (e.g., effective, ineffective) (Schultz, 1995). Thus, organizational culture is about the meaning of organizational behavior (i.e., formal and informal organizational guidelines, norms, or behaviors) in ways in which meanings and beliefs are assigned, and how these assigned meanings influence behavior that produces, maintains, and develops the organization's character. Functionally, organizational culture integrates occupational dynamics with its

members by creating or reproducing cultural processes. These processes are outlined in the next section.

Overview of Organizational Theory and Assumptions

The theoretical framework of organizational culture suggests that culture is an essential part of an organization (e.g., institution), which explains the formation of organizational climate and the psychological life of the organization (Alvesson, 2002; Anthony, 1994; George & Jones, 2000; Hultman, 2002; Muchinsky, 1997). Specifically, organizational culture is related to the components of organizations (e.g., goals; work; power and authority; delegation; differentiation, integration, and complexity) that form the structure and design in which boundaries/environment shapes the behavior of the organization and its members (i.e., adaptation, change) for its own wealth (Alvesson, 2002; Hodge et al., 2003). In this review, I discuss the following: (a) evolution of organization theory, (b) synopsis of organizational theory, and (c) overview of organizational culture within organizational theory.

Evolution of organization theory. The theory of organization emerged from three major schools of thoughts: the classical doctrine, the neoclassical (e.g., behavioral/humanistic) doctrine, and the system (e.g., modern organization theory) doctrine (Sexton, 1970). Each doctrine addressed specific academic disciplinary concepts related to their field of study that influenced the way management, administration, and leadership operated within organizations.

Organizational theories evolved over time, bringing understanding of the complexity in which organizations were structured and designed to function. The

works of Adam Smith (1723-1790) on division and specialization of labor laid the foundations of organizational and industrial theorists such as Max Weber and Frederick Taylor. Max Weber's (1864-1920) analysis of bureaucracy established that bureaucracy is the ideal form of an organization in where division of labor existed as a hierarchical chain of command were rules and controls were defined for each member and legitimized by the authority officials. Frederick Taylor (1856-1915) developed the notion that job specialization could be both developed and enhanced to obtain efficiency or scientific management. Other major contributors of the organization theory are discussed below. Frank (1868-1924) and Lillian Gilbreth (1878-1972) studied organization through the use of time and motion pictures for work simplification. Henri Fayol (1841-1925) established administrative management principles for organizational ethics. James D. Thompson (1920-1973) studied the effect of technology in organizations. Paul R. Lawrence (1922) and Jay W. Lorsch (1932) established organizational differentiation and integration, and Jay Galbraith studied organizational task activity and organizational structures which contributed to the classical school of thought in organization (Hodge et al., 1996, 2003; Huczynski & Buchanan, 2001).

The classical school of thought (1890-1930) addressed organizational concepts of division of labor, coordination and control, organizational structure, scalar process of organizations, functional processes and their relationships to staff based on three major theoretical foundations (e.g., engineering, bureaucracy, and economics) (Hodge & Anthony, 1979). The classical doctrine posited the anatomy of

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an organization building the structure and processes, and coordinating the set of

relationships among the components of the organization. Further, it established four

basic structural components in which organizations function (e.g., principles of good

organization). These structural components were: system of differentiated activities,

people, cooperation toward a common goal, and authority (Hodge et al., 2003;

Muchinsky, 1997). Each component requires rational structure and processes to

achieve organizational effectiveness. Therefore, the division of labor was

structuralized according a system of differentiated activities to link together the

organization with its functions. Through specified functions, members of the

organization (e.g., people) perform tasks that lead towards a common goal. This

interaction formed the organization's unity of purpose, which made cooperation a

central value for the continuance of differentiated activities among members of the

organization. In this pursuit, authority is exercised among superior-subordinate

relationships.

The classical school of thought of organization major concepts/components

are: functional, scalar, line/staff, and span-of-control (Scott, 1992; Scott, Mitchell, &

Birnbaum, 1981). The functional principle establish that organizations are structured

by divisions of labor, where work is structured in a horizontal formation of units

whereas the scalar principle refers to the augmentation of units by establishing a

vertical 'chain of command' where coordination is achieved by the unity between

hierarchies and subordinates. The line/staff principle establishes that line/staff

functions are designed to maintain, develop, and shape personnel and quality control

while supporting organizational goals. The span-of-control principle establishes that a supervisor is responsible to maintain an adequate number of subordinates to manage (i.e., control) (Hodge et al., 1996, 2003). Subsequently, these set of principles set the stage for the neoclassical doctrine of organization theory.

Founded as the neoclassical school of thought (1930-1960) because it accepted the tenants of the classical school, the neoclassical school is also called the humanistic or behavioral school as it addresses the psychological and behavioral organizational issues of an organization. The neoclassical school addressed the conceptual meaning of bureaucracy, structure, and personality through the understanding of man and institution, status and role, leadership, motivation, change as a phenomena, and organizational health (Sexton, 1970). It posits that functional division of labor produces depersonalization among members of an organization, which produces dissatisfaction, lack of sense of value and meaning (Hodge et al., 2003; Muchinsky, 1997). It established that the classical school of thought was not universally applicable to all organizations, and therefore, organizational structure is both human (i.e., people, supervisors, subordinates) and functional (i.e., division of labor, tasks, goals) (Hodge et al., 1996). It addressed that interpersonal activities are sources of influence that bring together the functional system, and the line/staff with the unity of command. Therefore, the span of control (i.e., number of employees per supervisor) is not about the number but the ability of the supervisor (e.g., leadership ability, style, capacity) (Muchinsky).

The theoretical foundations of the neoclassical school were psychology, sociology, and social psychology. From these major fields, the neoclassical school developed five major concepts, which are: motivation/needs theory, communications, leadership theory, group dynamics, and human relations (Hodge et al., 1996, 2003) through the contributions of scholars within these academic fields. Mary Parker Follet (1863-1933) formulated that organizations had a group principle, where emphasis was needed in participation, cooperation, communication, coordination, and sharing of authority. Chester Barnard (1886-1961) studied the functions of the executives in organizations. Douglas McGregor (1906-1964) postulated "Theory Y" (work is as natural as play) a humanistic view of behavior and motivation of work satisfaction, and "Theory X" (people dislike work) view of workers as lazy, unmotivated, and needing strict control for intellectual capacity. Frederick Herzberg (1923) developed a theory of motivation to work. George Homans (1910-1989) posited that group behavior is the result of individual behavior. Kurt Lewin (1890-1947) established that behavior was a psychological "field" in which behavior is reproduced by the interaction of internal and environmental as psychological forces (e.g., democratic or authoritarian individual/group behaviors) (Hodge et al., 2003).

The classical and neoclassical schools were challenged by the complex, dynamic, and multifunctional layers of organizational structures (e.g., units, offices, departments) at the interface of new technologies, which were often challenged by changes and economic issues that impacted organizational life. The emergence of the system school of thought (1960-present) addressed the management of the

organization as a system as well as the meaning of the organization. Models of communication and administration were integrated as basic processes of organizational realities that marked organizational research (e.g., management and operation assessment) (Sexton, 1970).

The system school of thought surfaced from the concept that organizations are social systems that have specific needs (Hodge et al., 2003). Thus, organizations become systems where human behavior is interdependent and interrelated to the elements or parts that make the organization. It established that an organizational system is composed of five parts: individuals, formal organization, small groups, status and role, and physical setting. Specifically, the system school departed from the principle that organizations were systems where individuals influence the 'organization' by their behavior (i.e., attitudes, values, abilities). Therefore, formal organizations provide a structure of the system in which jobs become interrelated. In this way, individuals become adapted into the system (i.e. small groups, work teams), and develop status and role differences where external physical organizational appearance and technology characterizes the organization in which culture is established (Hodge et al., 2003; Muchinsky, 1997). Through these parts, the system is structured by a series of networks in which communication and decision-making occurs. The links between the networks provide the system the capacity to attain stability, growth, and adaptability as a living organism through organizational life and structure.

The theoretical foundations of the system school are three: mathematics, engineering, and computer science. Through these major fields of study, the system school is built upon five major concepts of organization: quantitative techniques (organizational decision-making applications), wholism (organization functioning as a whole), open/closed systems (organizational relationship with its environment), macro/micro perspective (organizational network of systems), and functionalism (relationship of organizational components).

Additionally, it established that systems are either dynamic or static, and abstract or concrete. Dynamic systems are those that change overtime, whereas static systems are those systems that do not change. An abstract system refers to a system that is composed of ideas or concepts whereas a concrete system is composed of physical characteristics. Furthermore, systems can be classified into behavioral categories depending on how they function. These categories are: state-maintaining (reacts in a specific way), goal-seeking (reacts to end-state), multi-goal seeking (reacts to multiple goals), purposeful (reacts to same production of outcome), and cybernetic (reacts to information feedback mechanisms) (Hodge & Anthony, 1979).

The system school has several academic scholars that contributed to the notion of modern organizations. Kenneth Boulding and Ludwig von Bertalanffy used mathematics with organizational systems. Weiner and Beer applied cybernetics to organizations. Jay Forrester studied organizational functions and systems operations within the concepts of open/closed systems, and macro/micro perspectives. Martin Starr used mathematics to solve problems within organizations to develop efficiency

and functionalism. Thus, the system school used modern technology and applied mathematics to increase organizational effectiveness and wholism (Hodge et al., 2003).

Through the development of these major schools, the organization theory emerged producing a theoretical merger between schools of thought. The theoretical merger addressed organizational conflict by examining normative control and project management, specifically related to organizational control and leadership. It posited that the relationship between man and the organization was beyond bureaucracy (Bennis, 1970). Therefore, human behavior in organizations anticipated behaviors such as adaptation, integration, and supportive relationship building, that were built by a reciprocal nature of work (e.g., group dynamics) between the members of the organization (Cartwright & Zander, 1968; Sexton, 1970). Furthermore, the theoretical merger addressed the instrumentation of leadership as a manager and an administrator in organizational effectiveness and quality.

Synopsis of organizational theory. The organization theory is a mix of theories/assumptions as conceptual approaches to the structure (i.e., shape, form), function, and dynamics of the organization in ways in which it divides its labor into distinct tasks and then coordinates them to organizational success (Hodge et al., 2003). It posits that the social structures of organizations are set through tasks and goals by specific work values that address the diverse professional and personal skills of its members. Through the organizations' structure (e.g., array of tasks or differentiation, and coordination of various tasks or integration) and design (e.g., both

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processes and structural concepts of the organization such as unit grouping, unit size, planning, rules, policies, procedures, decision-making, centralization/ decentralization issues) organizations then create formal and informal organizations.

In this context, formal or *de jure* organizations are characterized by official designed roles and relationships whereas informal or *de facto* organizations are characterized by official designed roles in which relationships are not sanctioned but are bounded by organizational governance and control (Hodge et al., 2003). Accordingly, organizations become sets of systems or subsystems as functioning elements of the larger system that are often referred as open or closed. An open system refers to interaction with its environment whereas a closed system refers to no interaction with its environment (Hodge & Anthony, 1979). Therefore organizational transactions of the processes within the organizational governance establish the management of information in which political forces (e.g., power relationships) operate to institute innovation, strategic change, and organizational learning (Griffin, 2002).

Through a series of processes (e.g., operational, functional, structural) organizational authorities monitor the environment and adapt to its changing conditions (Huczynski & Buchanan, 2001). Muchinsky (1997) establish that "organizations continuously seek an organizational structure that is an optimal match to its environment" (p. 253). According to Mintzberg (1993), there are various types of organizational structures and environments. He stated that the structure of an

organization is "the sum total of the ways in which labor is divided into distinct tasks and then its coordination is achieved among these tasks" (p. 2).

Mintzberg posits that organizations coordinate their work through five coordinating mechanisms: mutual adjustment, direct supervision, standardization of work processes, standardization of work output, and standardization of skills and knowledge. These coordinating mechanisms enhance organizational cohesiveness, and effectiveness among organizational structures, functions, and its members. For example, mutual adjustment provides the coordinating mechanisms to achieve proper communication of work processes while adjusting efforts to promote an outcome. Through coordinating instructions, monitoring, and management a supervisor takes direct responsibility for the work of others. In this way, work processes are standardized, designed to achieve specified work output through standardized skills and knowledge.

However, the interrelation of these mechanisms depends on the structure of the organization or the design of the organization. There are five parts of an organization: operating core, strategic apex, middle line, techno-structure, and support staff (Mintzberg, 1993). The operating core is the heart of the organization (Muchinsky, 1997). It refers to the organization's members, and/or operators who perform the elemental work required for the production of products and services, which the organization requires to live. The strategic apex is the brain of the organization. It provides the direction, vision, and strategic plan in which the mission of the organization is maintained, developed, enhanced, and monitored by top-level

managers (i.e., presidents) (Ellis & Wildavsky, 1989). The middle line is the bridge between the operating core and strategic apex, and vice versa, creating a hierarchical structure of authority focused on mission, task, and standards while maintaining supervision, administration and management between the needs of the organization and its leadership with the needs of the operators. The techno-structure is the structural part of the organization that affects the work of others. They are the analysts that design work, plan work, and train to support the standardization of skills to ensure organizational effectiveness. The support staff provides services in support of the mission of the organization; characterized as an aid to the main function of the organization and its components.

Because organizations are social systems, their components are crucial to the organizations' function. There are three crucial components: roles, norms, and organizational culture. In terms of roles, (Scott et al., 1981) established the following five significant aspects of roles as critical component of an organization: (1) Roles are impersonal; thus expectations are set by the position; (2) roles are task oriented, and therefore, behaviors are set by the particular task; (3) roles are defined and redefined; (4) roles provide behavioral changes; and (5) roles are categorized by jobs, and one job may have several roles. However, roles play a fundamental key in differentiation between members of the organization based on the function, position, and status. Therefore, roles reflect on what is appropriate in a particular job/function.

Norms define the desire or acceptable behavior that is expected in the organization, group or sub-group. Muchinsky (1997) posits that norms have specific

properties that prescribe organizational behavior within an institution. Because norms can be written or unwritten, norms become rules of behavior that can be difficult to recognize. Properties of behavior such as 'oughtness or shouldness,' group or peer-enforced, directive or specified by the office or supervisor, are communicated in various ways (e.g., explicit, implicit). Thus, norms are valued and regarded as contributors of organizational structure that supports the organizational functions as well as organizational culture and climate (Hodge et al., 2003).

     Overview of organizational culture within organization theory. Organizational culture is an essential component of the structure of an organization (Alvesson, 2002; Anthony, 1994; Hall & Hall, 1990). Through organizational culture, roles and values are communicated, and transmitted across all levels of the organization (Alvesson, 1993; Bjerke, 1999). Culture determines what is appropriate, as a product of organizational behavior and prescribed patterns (Anthony, 1994). Specifically, organizational culture is linked to organizational success (Hodge et al., 2003; Muchinsky, 1997). Therefore, through organizational culture, the organization's internal and external environments are shaped by the values, norms, and practices designed to maintain working relationships among its members regardless of their race, gender, religion, or sexual orientation. However, organizational culture is directed by organizational experiences in which are not immune to biases. Thus, leadership becomes central to organizational culture development (Bryman, 1986; Ellis & Wildavsky, 1989; Fullan, 2001).

The term organizational culture emerges from the body of literature with a plethora of meanings that outlines 'culture' as a metaphor, purposely, to illustrate the larger context of organizational environment and its relationship to its members. Culture, in the organizational framework, "is the foundation that guides much of what happens in a social system" (Hodge et al., 2003, p. 91). Consequently, culture filters and prescribes behaviors in which organizations operate (Hodge et al.). Birnbaum (1991) posits that culture is like glue that maintains the organization cohesive. He states that culture is the "social or normative glue that holds an organization's cohesion. It expresses the values or social ideals and the beliefs that organizational members come to share (Birnbaum, 1991; Downton, 1973; Mintzberg, 1993). These values or patterns of beliefs are manifested by symbolic devices such as myths, rituals, stories, legends, and specified language (Smirch, 1983, as cited in Birnbaum, 1991, p. 72). In this way, culture influences an organization through its members (paraphrasing Masland, 1985, as cited in Birnbaum, 1991, p. 71).

Schein (1985) established that there are three levels of organizational culture. These are as follows: surface manifestations, values, and basic assumptions. In his view, culture is distinguished by its visibility and accessibility. Surface manifestation of culture is the most visible, apparent, and accessible level of culture. It is manifested by artifacts (e.g., tools, furniture, appliances, clothes); ceremonials (e.g., rituals, events, activities); norms and courses (induction, orientation, training); heroes (individuals, role models); language (technical vocabulary, business jargon, naming choices); mottoes, slogans and symbols; myths and stories (Hodges et al., 2003;

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Huczynsky & Buchanan, 2001; Schein, 1985). Through the surface level, culture is evident. It is seen and heard, as a display of the organization's environment.

In the second level, values and beliefs are defined by the worth or set of meanings that originated from the organizational founders. In this level, visibility is not perceived by the eyesight but by the perception of state of affairs of the organization through which organizational performance becomes whole. By means of shared value processes among elements of the organization, values become operationalized into practices and procedures that interface with staff, skills, style, system, structure, and strategy of the organization (e.g., 7-S framework of shared values) (T. Peters & Waterman, 1982).

The third level is the basic assumptions related to the relationship of the organization and its members (e.g., environment, climate); nature of reality (e.g., truth); human capacity and understanding about the organization and how it functions. In this level, culture is invisible and difficult to access (Hodge et al., 2003; Huczynski & Buchanan, 2001).

Organizational culture is learned, transferred, and passed around through the process of organizational socialization (Alvesson, 1993, 2002; Anthony, 1994; Bjerke, 1999). Socialization links culture to its members by means of informing, ensuring, conveying, and reinforcing its culture as a subsystem of the overall organization (Alvesson, 2002).

Alvesson (2002) stated, "Culture is one of several subsystems making up the organization…. Expressed and reproduced in formal organizational structures,

strategic plans, administrative systems, and so on" (pp. 26-27). Furthermore, social

fields transmit organizational culture. Bourdieu (1985) established that a social field

is the arena of activities and qualifications for success and recognition based on the

structure of positions and economic/symbolic rewards.

Through the social field, cultural competence underlies the required skills, in

which social codes are affiliated with the organization's dimensions (e.g.,

socialization, method of work, character of work, formula for success, standards, and

ideals) (Blumer, 1972; Bolman & Deal, 2001; Bourdieu, 1985; Farkas, 1996; T.

Peters & Waterman, 1982). Therefore, manifestations of culture and social fields

exercise influence in the organization in different ways that 'speak to' individual or

the group. For example, the *esprit de corps* or *laissez-faire* values are connected to a

social field where the individual or the groups share 'the specific value' as a

conceptualization of his/her personal value with the organizational value (Hultman,

2002; Schultz, 1995).

Knowledge of culture, specifically cultural intelligence, provides cognitive,

motivational, and behavioral elements as a critical way of conceptualizing, data

gathering, and operating organizational culture. Therefore, individual actions and

choices become interdependent of social, personality, and cultural personal traits that

are simultaneously guided by organizational culture. Individual and group

interactions are then, constructed by their own cultural intelligence (e.g., knowledge

of cultures) within the diversity of their own institutional values (Earley & Ang,

2003). Knowledge of cultures (e.g., organizational and individual ethnic

backgrounds) offers an understanding of cultural perceptions that are instrumental in the development of a diverse but cohesive organization based on ethnic differences among members of the organization.

Importance of Understanding Organizational Culture and Leadership

Since systems are hierarchical, members rely on leaders for organizational functioning (e.g., mission, vision, goals, and objectives) (Birnbaum, 1991). Thus, managers use a personal frame or image of organizations in order to make judgments, gather information, make-decisions and get the job done (Bolman & Deal, 1997). Organizations have multiple realities (e.g., structural, human resource, political, symbolic) (Bolman & Deal). Through these realities, a series of frames (lenses) determines how realities are seen, and acted on by leaders. Therefore, leaders have the responsibility to understand the culture within their organization, and help develop it to provide an effective and equitable environment to all its members (David, 1993).

In negotiating culture, leaders' perspectives and connotative understanding of cross-cultural knowledge, not only of the organization but the individual (e.g., ethnic identity) is central in order to 'operationalize' the organizational culture of the institution (Brannen & Kleinberg, 2000). Brannen and Kleinberg posit that Japanese management become filters of the external/internal cultural environment by identifying the organizational culture's dynamics through its pluralistic membership (e.g., stakeholders, operators, etc.). They state that" noting the influence of

individual's cultures of origin as well as structural/contextual influences in the organization's external/internal environment" is significant in how leaders influence in shaping culture of their organizations (p. 397).

In this concept, organizations become cultural systems where leaders become an inseparable entity (Sergiovanni, 1984). Sergiovanni posited that leaders are actors "in a human drama known as organizational life" (p. 118). Thus, the task of leaders is conceived as cultural entities that create the 'environment' necessary to bind (e.g., glues together) the organization and its people. Leaders, then, use "persuasion, calculation, guile, persistence, threat, or sheer force" to facilitate the organizational culture necessary for its end-state (p. 120). Thus, management, administration, and leadership drive the 'social fields' within the organizational structure pertinent to quality, efficiency, and effectiveness. For example, a Japanese manufacturing company named *Genba Kanri* is an extremely successful enterprise around the world. Its organizational culture is embedded in its name, which is structured, designed, and formulated to apply norms, values and assumptions for success. Tasks are defined, controlled, and continuously improved through the very own words of *Genba Kanri* (e.g., real people, real place, real management). Using this slogan, organizational leaders within *Genba Kanri* established a culture where management is everyone working together as an outset for "real battle for quality, real productivity, where real problems are encountered, where real decisions must be taken, where real management happens" (Handyside, 1997, p. 73). Thus, it projects a climate for action

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and a culture of teamwork in which economic revenues project millions of investors worldwide.

Another example of organizational culture and leadership is the cybernetics of the academic organization. In academic organizations, structural controls and social fields are organized as feedback loops sensitive to selected factors of the environment (Birnbaum, 1991). Functionally, it provides ongoing feedback or organizational processes necessary to keep functioning, and when complexities arise for solution. In this way, academic organizations act as subunits in which leaders are challenged to sense changes and make appropriate adaptations without disruption of academic freedom (Roy, 1977).

Academic leaders promote a systematic and ongoing organizational culture of support that provides emotional support, advice, information, and advocacy at all levels of the hierarchical structure of academia (e.g., students, faculty, staff, alumni) (Shaw, Valadez, & Rhoads, 1999). Values, beliefs, norms, and attitudes are carried through academic practices, rituals, ceremonies, programs and activities that target a sense of a 'learning community' that empower the academic community. Toward the goal of cohesiveness, academic leaders yield significant outcomes as a whole through dynamic and systematic processes of organizational and individual transactions and transformations in the way people function (Birnbaum, 1991; Schein, 1985; Shaw et al., 1999).

Managing culture in an organization is a building process upon which organizational leaders incorporate patterns of meanings and experience through the

medium of culture. Purposely so, leaders become visual representatives and molders of values of action that exercise influence on cultural formation, innovation, and change (Alvesson, 2002; Anthony, 1994). Specifically, leaders shape organizational culture by creating the patterns and behaviors within organizations (e.g., involvement, commitment, loyalty) that provide specific cultural behaviors that are reinforced by organizational practices within the members of the organization (Beyer, Hannah, & Milton, 2000). By emphasizing values, norms, affects, attachments, identification, and shared beliefs, leaders mold organizational climate, and its culture (Virtanen, 2000). Further, by changing the nature of work, and organizational expectations (e.g., flexibility, adaptability, continuous learning/self-development, information sharing/teamwork, personal/professional meaningfulness, socialization), leaders enhance the organizational climate that is key to both transmitting and perpetuating organizational culture (Major, 2000).

In a nutshell, organizational leaders have the responsibility for the organization's structure as well as the organizational behavior in the patterns for equity, equality, and competing needs. For example, leaders must manage training and development, compensation, promotion, job security, feedback and personal matters of employees, which are the environmental influences for mental health (e.g., stress and well-being at work). Furthermore, leaders must influence employees (e.g., behavior, performance, ability, situational constraints, and motivation) (Muchinsky, 1997).

Therefore, leaders must understand organizational culture (Bolman & Deal, 2001; Fullan, 2001; Huczynski & Buchanan, 2001). Presumably, leaders are expected to be a leader, know how to lead, and do what is best for the organization's success (U.S. Army, 1990, 2003). In the next section, I discuss several theoretical approaches to leadership to explain the phenomena of leadership.

Leadership Theories and Assumptions

Leaders are expected to have leadership attributes, qualities, and abilities in order to be effective, efficient, and productive of excellence in quality and performance as a result of their actions (Bolman & Deal, 1997; Drucker, 1993). Much of the research on leaders point out at a cross-section among and between leaders, followers, and their approaches to leadership (Northouse, 2004). Through this connection, the research studies reveal several processes and actions defined by leadership theories and assumptions that give light to the understanding of the phenomena of how people lead. In this understanding, the concept of leadership appears to be a universal and dynamic concept based on the philosophical views of each academic field to simplify and identify what leaders do when they lead? (Stogdill & Bass, 1990). Consequently, it is not surprising to see the multiple theories, assumptions, approaches, and styles of leadership.

In this section, I address the theoretical concept of leadership and how it relates to leaders and their organizations. For the purpose of this review, I provide an overview of leadership through the following topics: (a) definition of leadership, (b) synthesis of past and present leadership studies, and (c) scarcity of leadership research on Latino leadership.

Definition of Leadership

Over the decades, the study of leadership has shed many definitions (Bass, 1990, 1981; Bogue, 1994; Chemers & Ayman, 1993; Cohen & March, 1974; Griffin,

2002). However, most of the literature point out to an intersection between leadership as a universal concept and leadership as a process (Kanter, 1996). Bass (1981) stated, "leadership is a universal human phenomenon" (p. 5). Chemers and Ayman (1993) posited that leadership is "a process of social influence in which one person is able to enlist the aid and support of others in the accomplishment of a common task" (p. 1). According to the U.S. Army (2003) "leadership is the ability or process to influence, lead, or guide others so as to accomplish a mission in the manner desired by providing purpose, direction, and motivation." Military leadership doctrine suggests that leadership factors (e.g., the led, the leader, the situation, and communications), principles (e.g., Be, Know, Do), and competencies (e.g., communications, supervision, teaching and counseling, team development, technical and tactical proficiency, decision making, planning, use available systems, and professional ethics) are key elements in leading for success (U.S. Army).

For instance, U.S. Army leadership effectiveness is characterized by the principles that serve as a guideline for action. Subsequently, leadership focuses on 11 principles, which are: Know yourself and seek self-improvement; be technically and tactically proficient; seek responsibility and take responsibility for your actions; make sound and timely decisions; set the example; know your subordinates and look out for their well-being; keep subordinates informed; develop a sense of responsibility in your subordinates; ensure the task is understood, supervised, and accomplished; build the team; and employ your unit in accordance with its capabilities (U.S. Army, 1990,

p. 5). Thus, leadership defines action through the understanding of relationships through universal processes (Kouzes & Posner, 1995).

Therein, because leadership is both a universal phenomenon and a process viewed through multiple lenses of philosophical thoughts and theoretical concepts, a concrete definition is an unrealistic expectation (Bass, 1981, 1990; Birnbaum, 1991; Bolman & Deal, 1997). There is no "one-way" definition but multiple, and therefore, it is not surprising to find copious constructs that further define leadership by its ambiguity, complexity, and dynamic processes (Komives, Lucas, & McMahon, 1998). Furthermore, leadership literature reveals "a puzzle like" effect of meaning that has failed to discern the structure of leadership. Instead leadership research has focused on three major aspects of leadership: (a) being a leader, (b) knowing how to lead, and (c) leading (Covey, 1991; Griffin, 2002; U.S. Army, 1990, 2003). The analysis of the literature on leadership suggests that leadership is an individual blueprint of abilities, actions, and processes of universal nature.

Synthesis of Past and Current Leadership Studies

Studies of leadership have concentrated their efforts in the understanding the phenomena of leadership from the concept of what makes a good leader and who should lead (Cawthon, 2002). In this section, I provide a historical synthesis of the leadership theories, assumptions, and frameworks based on the following: (a) Traits approach (1800s-1940s), (b) behavior approach (1940s-1970s), and (c) contingency approach (1960s-present).

Traits approach. Early in the 20th century, research on leadership began to determine what traits a leader must have to be effective. This notion gave light to the trait approach, which emerged as a challenge to the great man theories that focused on great leaders such as Gandhi, Lincoln, and Napoleon. Historically, a leader was thought to be a person of superior qualities, and only "great men" possessed those qualities for leadership (Bass, 1981; Chemers & Ayman, 1993; Northouse, 2004).

The trait approach posited that leaders have five major leadership traits (e.g., intelligence, self-confidence, determination, integrity, sociability) that enable leaders to lead effectively (Bennis & Nanus, 1985). Various research studies outlined different traits and characteristics of leadership such as: (1) Stogdill (1948) – intelligence, alertness, insight, responsibility, initiative, persistence, self-confidence, and sociability; (2) Mann (1959) – intelligence, masculinity, adjustment, dominance, extroversion, and conservatism; (3) Stogdill (1974) – achievement, persistence, insight, initiative, self-confidence, responsibility, cooperativeness, tolerance, influence, and sociability; (4) Lord, DeVader, and Alliger (1986) – intelligence, masculinity, and dominance; and (5) Kirkpatrick and Locke (1991) – drive, motivation, integrity, confidence, cognitive ability, and task knowledge (Northouse, 2004, p. 18).

The traits approach focuses on the leader. Specifically, it emphasizes leadership traits or personal attributes as central to leadership effectiveness (Komives et al., 1998; Muchinsky, 1997). The studies of leadership traits and characteristics suggest that personal characteristics and traits are important for particular positions,

organizations, and tasks. Through the trait approach, leadership qualities are examined to increase the potential impact of leaders' traits (Fullan, 2000; Northouse, 2004). The assumptions of leadership in terms of traits and personality rose from the following major scholars: L.L. Bernard (1926), Bingham (1927), Tead (1929), and Kilbourne (1935). Other major contributors to this approach were: Bird (1940) who compiled a list of traits; Smith and Kruger (1933) who studied traits for educators; and W.O. Jenkins (1947) who researched traits for military leaders (Bass, 1981, 1990).

By 1950s the traits perspective of leadership was replaced by addressing "leadership as a set of developable skills" (Northouse, 2004, p. 35). The skills approach was divided into three main categories, which are: technical (e.g., specialized area, analytical ability, hands on knowledge), human (e.g., people skills), and conceptual (e.g., work with ideas). Katz (1955) defined leadership by the ability or competency of the leader. By 1990s with the emergence of complex and dynamic organizations, skills approach researchers began to study leadership skills and problem solving. Through a research study conducted by U.S. Army and Department of Defense, a sample of over 1,800 officers was used to assess skills, experience, and situations. The results of this study provided the grounds for the formulation of the skills model (Mumford et al., 2000).

The skills model focused on three components, which are: individual attributes (e.g., cognitive ability –general and crystallized, motivation, personality), competencies (e.g., problem solving skills, social judgment skills, knowledge), and leadership outcome (e.g., effective problem solving, performance) (Mumford et al.,

2000; Northouse, 2004). The emphasis of this model was to address leaders'

competencies that made effective leadership a possibility (Mumford et al., 2000).

Through this model, skills "are competencies that individuals can learn to develop"

(Northouse, 2004, p. 50). However, the model did not address how skills lead to an

effective leadership performance (Bass, 1990; Komives et al., 1998).

Behavior approach. By the 1940s, scholars looked at the personal qualities of

a leader, studying the leader's psychological traits. Kurt Lewin founded the behavior

approach identifying three major styles, which are: democratic (participative),

autocratic (non-participative), and laissez-faire (non-directive) styles (Bass, 1981).

Some of the major scholars for this approach were Aaronovich and Khotin (1929),

Mawhinney and Ford (1977), W.E. Scott (1977), Sims (1977), and Davis and Luthans

(1979) who studied how behaviors influence task and subordinates in leadership.

The behavior approach did not articulate which style was more effective as a

best way to lead. Instead, it focused on the leader's behaviors, specifically what

leaders do and how leaders act (e.g., tasks and relationships). The purpose of this

approach was to understand how behaviors influenced subordinates (Cartwright &

Zander, 1968). For instance, the relationship style posited that behaviors that built

relationship were effective in building work-orientation; whereas the structure style

posited that tasks, procedures, and communication expectations were necessary for

establishing effective leadership (Yulk, 1994, 1998). Through this approach,

leadership researchers from the Ohio State Leadership Studies identified two major

concepts of effective leadership: (1) follower satisfaction (e.g., structure), and (2) task

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and relationship behavior style (e.g., consideration). The University of Michigan Studies identified two types of leadership behaviors, which are: (1) employee orientation, and (2) production orientation (Komives et al., 1998).

Using the behavior approach, leaders see their own behaviors in relation to their tasks and their subordinates in order to be effective. Blake and Mouton's managerial (leadership) grid model or leadership grid explained how leaders used their style to get an organization to perform. This model focuses on two factors, which were: concern for production and concern for people that portrayed five major leadership styles (e.g., authority compliance, country club management, impoverish management, middle-of-the road management, and team management (Bass, 1981; Northouse, 2004). However, the skill model failed to find a universal style of leadership (Komives et al., 1998; Yulk, 1994).

The style approach gives emphasis to the leader and his/her behavior whereas the situational approach emphasized on the situation of the leader (Northouse, 2004). Through the situational approach leadership reflected a directive (e.g., task behaviors) and a supportive (e.g., relationship behaviors) dimension. The situational leadership II model suggested four styles of leadership based on both dimensions. The four styles of leadership were: directing (e.g., high directive-low supportive style), coaching (e.g., high directive and supportive style), supporting (e.g., high supportive- low directive style), and delegating (e.g., low supportive and directive style) (Bass, 1990; Northouse, 2004). This model responded to practicality and is currently use in training individuals (Hersey & Blanchard, 1993). However, this model fails to

address the theoretical basis as well as the conceptualization of the subordinates while not accounting for demographic characteristics that influence leadership styles (e.g., age, ethnicity, education, experience, gender (Fernández & Vecchio, 1997; Komives et al., 1998).

Contingency approach. By the 1960s, the study of situational factors in leadership effectiveness studies began to analyze how the leader's personality, style, and behavior became contingent upon a situation (L. Peters, Hartke, & Pohlman, 1985). Some of the scholars who contributed to this approach were Fielder (1967), Fielder, Chemers, and Maher (1976), and Fielder and Leister (1977) who studied the effectiveness of leadership based on pattern of leader behavior contingent on the demands of the situation (Bass, 1981).

The contingency approach posited several arguments, which are: (1) there is no best way to lead, (2) the situation determines the style and behavior of the leader, (3) leadership behaviors can be taught, (4) leaders can impact an organization (e.g., group), and (5) the effectiveness of leadership lies within the interaction between the situational factors and the leader's personal characteristics. As a result, modern approaches to leadership effectiveness have integrated traits, behavioral, and contingency approaches to leadership (Bass, 1981; Northouse, 2004).

The contingency approach focuses on leader-match theory (Fiedler & Chemers, 1974). It addresses leadership styles in the context of their effectiveness (e.g., styles and situations). Within this framework, leaders are described as task (e.g., reaching a goal) motivated or relationship (building relationships) motivated.

Through these perspectives, the contingency approach explains how organizations can engineer their situations through leadership processes (Fielder & Chemers).

The contingency model classified leaders by three major factors (e.g., leader-member relations, task structure, and position power) and applied it to the preferred leadership style (LPC) level (e.g., low, middle, high) (Fielder & Chemers, 1984). The purpose of this model was to provide an understanding of the leader and the situation as it fits with the style of the leader. However, this theory does not explain the increased effectiveness of some styles than others in certain situations, and how this affects the organization (Northouse, 2004). Basically, it does not answer how leaders motivate subordinates.

Path-goal theory. The path-goal theory focuses on the development of subordinates through which leaders and subordinates relate to the work environment in terms of motivation. This theory emphasizes leaders' perspectives in defining goals, clarifying paths, removing obstacles, and providing goals. The path-goal theory portrays four leadership behaviors: directive, supportive, participative, and achievement-oriented. Through these leadership behaviors, goals are set up by the leader while contemplating the subordinates' motivation and task characteristics (House & Mitchell, 1974). In 1996, this theory was revisited to add four major leadership behaviors, which are: work facilitation, group-oriented decision process, work-group representation and networking, and value-based behavior (House, 1996). However, it fails in explaining the relationship between leaders' style and subordinates' motivation (Komives et al., 1998; Northouse, 2004).

Leader-member exchange theory. The leader-member exchange theory (LMX) focuses on the interactions of the leader and the subordinate(s). The LMX sought leadership in three major dimensions (i.e., leader, follower, and dyadic relationship) where relations were established based in mutual trust, respect, liking, and reciprocal influences (Dansereau, Graen, & Haga, 1975). Graen and UhlBien (1991) suggested three phases in which leaders and subordinate relate to each other. These phases are: (a) strangers, (b) acquaintance, and (c) mature partnership. Through these phases, organizational roles, influences, exchanges, and interests are developed based on the length of time. As a result, groups develop as in-groups (i.e., closely relation with leader) and out-groups (i.e., far relation with leader) allowing the leader to function using their established relationships for organizational performance and culture, commitment, job climate, empowerment, career progress, and many other organizational variables. However, this theory does not explain the quality of the relationship and its bias for privilege of in-groups vs. out-groups within the measurements of effectiveness in the organization (Yulk, 1994, 1998).

Transformational, transactional, and laissez-faire approach. The transformational leadership approach is "a process that changes and transforms individuals. It centers on the effects of leadership on emotions, values, ethics, standards as well as goals and motives by incorporating charismatic and visionary exceptional form of influence as affective elements of leadership (Burns, 1978; Downton, 1973). Burns (1978) posited that there are two types of leadership, transformational and transactional.

Transformational leadership refers to the process whereby the leader and the follower create a connection that raises motivation and morality levels. An example of this type of leadership is Mohandas Gandhi and Mother Theresa. There are four factors that influence transformational leadership. These factors are: idealized influence or charisma, inspirational motivation, intellectual stimulation, and individualized consideration through the use of charisma and vision (Bass & Avolio, 1994a, 1994b). Additionally, the theory of charismatic leadership focuses on leadership actions that have charismatic effects on their followers (Conger, 1999; House, 1996; House & Mitchell, 1974; Hunt & Conger, 1999). House (1996) posited that charismatic leaders possess four major personality characteristics, which are: dominance, desire to influence, confident, and strong values. Furthermore, Avolio and Gibbons (1988) established that charismatic leaders increase the followers' sense of competence and self-efficacy while creating identity as a collective through intrinsic rewards.

Bass (1990) established that transformational leaders motivate followers to do more by the following processes: (a) raise followers' consciousness of goals and values; (b) transcend followers' sense of self-interest; and (c) motivate followers' higher-level needs (p.20). Bennis and Nanus (1985) argued that transformational leaders meet their objectives because they use four major strategies (e.g., communicate vision, become social architects for their organization, create trust, and use positive self-regard (Northouse, 2004). Tichy and DeVanna (1990) suggested that leaders manage change in organizations through a three-act process: (1) recognizing

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the needs for change, (2) creating a sense of vision for change, and (3) institutionalizing change.

The transactional refers to the exchanges or transactions that occur between leaders and their followers. An example of this type of leadership is embedded in educational leaders such as teachers and principals. The transactional leaders focus on the needs of the leader and how he or she influences the subordinates. It rest in two major factors, which are: contingent reward/constructive transactions and management by exception (e.g., active or passive)/corrective transactions (Bass & Avolio, 1994).

The laissez-faire leadership represents the absence of leadership within the continuum of transformational and transactional leadership model (Bass & Avolio, 1994). Through this form of leadership, the leader displays a hands-off or let things ride approach (Northouse, 2004).

Transformational approaches to leadership present various strengths in its perspective of leadership as a process based on empirical research (Lowe & Gardner, 2001). It links the follower's needs, values, and morals with an effective form of leadership (Northouse, 2004). It focuses on transactional process nurturing followers with intrinsic rewards that places emphasis on growth as well as needs of the followers (Avolio, 1999b). However, this type of approach forms an aura of heroism that is perceived as elitism and antidemocratic that can be used for destructive purposes (Howell & Avolio, 1992).

Team leadership approach. The study of human groups (teams) has several focuses: (1) human relations as work movements (e.g., 1920s to 1930s); (2) group dynamics (e.g., 1940s); (3) sensitivity training and role of leadership in groups (e.g., 1950s); (4) team development and leadership effectiveness (e.g., 1960s to 1970s); (5) quality, benchmarking, and continuous quality improvement of teams (e.g., 1980s); and (6) team-based technology or virtual teams (e.g., 2000s) (Northouse, 2004). This type of approach focus on two critical functions of leadership, which are: task function (e.g., team performance) and maintenance function (e.g., team development) of teams (Kinlaw, 1998). Specifically, leaders provide focus of goal, collaborative climate, build confidence and competence, set priorities, and manage team performance (LaFasto & Larson, 2001).

The team leadership approach posited that external and internal team processes depend on the leaders understanding of both the structure and functioning of the team. Through monitoring and taking action, the leader associates its style to the subordinates as a team (Northouse, 2004). Hackman and Walton (1986) suggested the following three conditions for team effectiveness: clear and engaging direction, enabling structure/context and expert coaching, and adequate resources (p. 87). Larson and LaFasto (1989) suggested that team excellence was a product of a set of characteristics that define highly effective teams. These characteristics are: clear/elevating goal, results-driven structure, competent team members, unified commitment, collaborative climate, standards of excellence, principled leadership, and external support (p. 20).

Hill (2004) proposed a team leadership model that focuses leadership on three areas of team effectiveness, which are: (1) performance conditions (goals, structures, resources), (2) performance processes (effort, knowledge, strategies), and (3) outcome states (satisfaction, performance) (pp. 216-217). This model places the leader in two strategic functions: internal team (task and relational) and external team (environmental) functions. The task and relational functions of leadership for team effectiveness are related to the structure of the task (e.g., clarifying goals, establishing structure, decision making, training and standard setting) and the processes of establishing relations (e.g., coaching, collaborating, managing conflict, building commitment, satisfying, and modeling principles) with the team while the environmental function is related to the social architecture of the team (e.g. networking, advocating, negotiating, buffering, assessing, sharing information) (Hill, 2004, p. 217).

Through the team leadership approach, leadership roles concentrate in team functioning. Thus, it assumes that the leader knows about team managements, group processes, and teambuilding concepts to empower and direct effective teams. However, team leadership suggests a relational function between task and the environment that outlines the specific functions of the team leader in today's business structural nature.

Psychodynamic approach. Emerged from Sigmund Freud works on psychoanalysis (Freud, 1938), the psychodynamic approach was proposed by Abraham Zaleznik (Stech, 2004). The psychodynamic approach focuses on the

understanding of the psychological make-up (e.g., knowledge of their personalities, skills, behaviors, nature, attitudes, strength and weaknesses) of followers. The psychodynamic approach does not make any assumptions of leadership styles and followers behavior; simply it focuses on obtaining insight of their subordinates (Stech). Its emphasis is in the understanding of subordinates' family of origin, maturation (adolescence through adulthood) or individuation (childhood processes), dependence and independence, repression (thoughts or feelings unacceptable to society) and shadow self (unconscious self), and archetypes (pattern of psyche) Stech, p. 238).

The relational analysis model of psychodynamic approach relates to a transactional process of psychodynamics between the leader and the follower. Berne (1961) established that there are three ego states wherein parent, adult, and child transactions coexist between leader(s) and subordinate(s). Thus, leaders using this approach operate in a transactional manner to relate to the subordinate in order to achieve effectiveness (Stech, 2004). Further, this type of approach provides leaders an inner insight of their followers, yet it is limited by leadership intention (ethics and morals) and followers' self-disclosure/trust.

Ethics leadership approach. In 1970s the study of ethics in leadership centered business management and administration literature. By 1996, leadership ethics surfaced as a result of W.K. Kellogg Foundation research on leadership ethics as the heart of leadership (Ciulla, 1998). This approach focuses on five principles of leadership ethnics, which are: respect, service, justice, honesty, and community

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(Ciulla, 2003; Johnson, 2001). Its emphasis lies on two major philosophical concepts, conduct, and character. Ethical theories point out to the necessity of human *ethos* (e.g., customs, conduct, character) where individuals' values and morals display a sense of virtue and decency in society (Northouse, 2004).

The teleological framework of this approach concerns the meaning of *telos* (ends and purposes) about the leaders conduct and character. There are two major teleological frameworks that define leadership conduct into ethical egoism (greater good for self), utilitarian (greatest good maximized), and altruism (greatest good for the interest of others) (Avolio & Locke, 2002; Bass & Steidlmeier, 1999; Bowie, 1991). Heifetz (1994) argued that leaders' ethical dilemma is to ensure personal growth for followers. Burns (1978) posited that leaders' ethical perspective lies on personal motivations and moral development. Greenleaf (1970) stated that leaders must practice servant leadership emphasizing on followers needs through listening, offering unconditional acceptance, and providing empathy.

Through this approach, ethical leadership posits that leaders build community (Bass & Steidlmeier, 1999; Burns, 1978; Rost, 1991), serve others (Gilligan, 1982; Greenleaf, 1970; Kanungo & Mendonca, 1996; Kouzes & Posner, 1995), and are just and honest (Beauchamp & Bowie, 1988). This approach highlights the virtuosity of leadership and its ethical nature within the concept of human nature. However, ethical leadership relies on leadership values and moral dimensions that define the leaders' own state of being and human nature (Northouse, 2004).

Women and leadership approach. Thought decades, the studies of leadership and

women have concentrated on three questions: (1) Can women be leaders? (Bell &

Nkomo, 1992); (2) Do male and female leaders differ in their behavior and

effectiveness in organizations? (Chliwniak, 1997); and (3) Why do so few women

leaders reach the top? (Indvik, 2004 as cited in Northouse, 2004). In answering these

questions, women and leadership studies focus on allocation of responsibility,

effectiveness, and performance instead of gendered discriminatory attitudes in regards

to feminized behaviors toward women.

The women and leadership approach outlines women as leaders within the

context of gender dynamic in organizations. It focuses on gender differences and

inequalities in search of excellence and workplace fairness (Begun, 2000; Belenky,

Clinchy, Goldberger, & Tarule, 1986; Bell & Nkomo, 1992; Catalyst, 2003; Gilligan,

1982; Hill, 2004; Katz, 1955; Sturnick, Milley, & Tisinger, 1991). Furthermore, it

outlines the pervasive glass ceiling barriers of women of color in relation to White

women. Both empirical and demographical data reveal that women can be leaders

(Indvik, 2004). Statistical data related to labor force show that 46.6 percent of women

in the United States are employed in 2001.

According to Indvik (2004) the following data reflects women leadership in

U.S. Business: About 15.7 percent of top management positions in Fortune 500

companies are filled by women with 1.3 percent by women of color. In 2001, women

held about 12.4 percent of seats on Fortune 500 corporate/director boards, but only 2

percent were women of color. From Fortune 500 companies, six women hold

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positions as CEOs, and at Fortune 1000 companies, five women hold positions as CEOs in 2001, but there are no women of color in these positions. Women Governors (2002) state that currently women hold: 12 percent of the governorship positions; 3 percent of the U.S. Senate positions; and 14 percent of the U.S. House of Representatives' positions (Indvik, 2004 as cited in Northouse, 2004).

According to the Catalyst (2003) there are 163 women of color corporate officers and top earners (e.g., 106 African American, 30 Asian American/Pacific Islander, 25 Hispanic/Latina, 2 non-reported ethnic/race) throughout the United States. Currently, there are 6 female CEOs in Fortune 500 companies (Today, 2003). In 2002, there were 11 women who were CEOs in Fortune 1,000 companies and 10 women who were CEOs in Fortune 500 companies (Fortune, 2002).

Data from the Catalyst (2003) showed that there is a few number of Latinos in higher education faculty positions. Latinos hold about 2.4 percent full-time faculty positions in higher education while the Latino student population in higher education is 9.3 percent. There is a lack of Latino teachers in elementary and secondary school. About 4.3 percent teachers at elementary and secondary school throughout the U.S. are Latinos while the overall public school Latino student population is 14 percent.

In higher education administration leadership, women represent a small number. In 1995, of a total of 2,903 women held CEO positions in higher education but only 16 were of Latino heritage (5%) (Martínez, 2002). According to the American Council on Education (2002) there are 3,110 CEOs in colleges and universities (e.g., Two-year and four-year institutions) across the U.S. but only 654

(21%) are women and of that number 16.1 percent are minority women. Minority CEOs account for a total of 367 with 105 women and 262 men. However Latinas holding a CEO position are few. There is a total of 123 Latino/Hispanic CEOs in the U.S. in which 37 are women and 86 are men. The data reveal a lack of representation of Latino women in positions of leadership and power in higher education.

According to the Women's Research and Education Institute (Women's Research and Education Institute [WREI], 2003), there are 176,712 of enlisted women and 33,465 women officers in active-duty military service (e.g., Army, Navy, Marine Corps, Air Force, and Coast Guard). On active duty, Latina officers are 5 percent compared to 10.5 percent of enlisted Latina soldiers (WREI, 2003). Active duty enlisted women data show that there were 48 percent White, 34.3 percent Black, 10.1 percent Latino/Hispanic, 1.6 percent American Indian, 4 percent Asian/Pacific Islander, and 2 percent of other ethnicities. In contrast the women officers were 70.6 percent White, 16.2 Black, 4.3 percent Latino/Hispanic, 0.6 American Indian, 4.8 Asian/Pacific Islander, and 3.5 percent of other ethnicity (WREI, p. 14).

In Reserve duty, Latina officers are 4.8 percent compared to 10.5 percent of Latina enlisted personnel (WREI, 2003). In the Reserve (i.e., federal forces related to the Army, Navy, Marine Corps, Air Force, and Coast Guard) there were 71,381 enlisted women and 17,624 women officers, while in the Guard (i.e., dual state and federal forces, Army and Air) there were 57,187 enlisted women and 5,679 women officers (WREI, p. 24). In a nutshell, the data suggest that there are proportionally more Latino women in leadership roles in the military than in higher education.

Additionally, meta-analysis and literature reviews over the past 15 years suggest that there are differences between women and men in leadership (Indvik, 2004, p. 267). Eagley and Johnson (1990) established that women use a participative or democratic style of leadership while men use an autocratic and directive style of leadership. Eagley, Karau, and Makhijani (1995) argued that females and males do not differ in leadership effectiveness. Belenky et al. (1986) posited that women and men differ in worldview, socialization, and life experiences (Lowe & Gardner, 2001). Oakley (2000) researched and found that women encounter salary and promotion inequities more than men. Eagley et al. (1992) argued that women and men differ by performance evaluation, whereas Tharenou, Latimer, and Conroy (1994) stated that women and men differ in types of management training. Ohnlott, Ruderman, and McCauley (1994) argued that women and men differ in types of assignments; Dreher and Cox (1996) stated that women and men differ in mentoring (American Council on Education, 2002; Méndez-Morse, 2000; Women Governors, 2002).

Furthermore, Bell and Nkomo (2001) posited that women and men differ in work environment, support, and adaptation on career advancement as well as the role of the family (Tharenou, 2001). Eagly et al. (1995) established that women and men differ in conditions of leadership fit in an organization (e.g., education, business, military). Eagly (1992) posited that women and men differ in ways in which an organization or institution defines their roles as feminine or masculine fashions. Further, Indvik (2004) points out at the research literature posited that women and men may differ on how they handle stress and pressure. Thus, women and men differ

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in ways in which they approach solutions; women may emphasize an empathetic

approach while men emphasize in winning at all cost (Indvik, 2004 as cited in

Northouse, 2004).

Data-based explanations on why few women leaders reach the top suggest

three main findings. Women's pipeline in managerial positions has slow progress

(Heilman, 1997). Women may lack experience, or do not posses the necessary

qualifications, or lack confidence (Morris, 1998). Women may encounter

organizational barriers (e.g., higher standards, inhospitable culture, preference for

gender similarity, inaction, lack of recognition, and lack of development

opportunities) (Indvik, 2004 as cited in Northouse, 2004). Furthermore, women

encounter interpersonal (e.g., prejudice, stereotyping, preconceptions, lack of support,

exclusion, lack of mentorship) and personal (e.g., lack of political savvy, work-home

conflicts) barriers (Morrison, 1992). Additionally, women of color may experience

racial preconceptions, acculturation and bi-culturation demands, language prejudice,

and cultural difference between dominant culture (Acosta-Belén, 1979; Belenky et

al., 1986; Bonilla-Santiago, 1992; Bordas, 2001).

Scarcity of Leadership Research on Latino/a Leadership

Theoretical approaches to leadership developed an understanding of

leadership between the positional power, the leader, and the led through the process

of influence, the situation, and level of effectiveness (Bass, 1981, 1990; Muchinsky,

1997; U.S. Army, 1990; 2003). Research on leadership has focused on the leader's

sources of power, commitment, and compliance, and its development, which has increased the scholarly research on women leadership (Muchinsky, 1997). However, little is know on how minorities lead, specifically how Latino women lead (Bonilla-Santiago, 1992; Martínez, 2002). Thus, scholarly work on Latino leadership and Latino women leadership is scarce (Bordas, 2001; Chahin, 1993; González, 2000; Gorena, 1996; Haro, 1983; Martínez, 2002; R. Padilla & Chávez Chávez, 1995). Additionally, research studies on leadership do not address the contributions of Latino women in three main arenas: education, business, and military. Consequently, leadership theories/approaches suggest a need for Latino women leadership research (Bonilla-Santiago, 1992; Flores Niemann et al., 2002).

Furthermore, women scholarship has neglected to include the relationship of Latino women's leadership to women leaders in the U.S. (Bonilla-Santiago, 1992; Bordas, 2001; Burgos-Sasscer, 1990; Chahin, 1993). Leadership research uncover that the leaders' inner structure (e.g., skills, talents, abilities, attitude, personality, desire) is the cornerstone of leading; hence becoming essential for organizational effectiveness, efficiency, and excellence (e.g., the 3 E's of organizational success) (Chemers & Ayman, 1993; Chliwniak, 1997). Therefore, the leader's fit with organization becomes integral part of the organizational advancement and innovation (Schein, 1992). For example, there is no worse leader than one who does not want to lead and/or does not have the skills (e.g., or the desire to obtain/develop the skills to lead) but is in a position of leadership. Consequently, the structure of leadership posits a process of action through an inner structure that goes beyond gender and

ethnicity (e.g., gender and ethnicity become part of the identity of the leader) (Wellins, Byham, & Wilson, 1991), specifically how Latino identity connects with the organizational culture and leadership behavior (Martínez, 2002).

Despite an increase of Latinos in the labor force, most Latinos continue to be underrepresented in leadership positions of administration (MALDEF, 1990a; Meier & Steward, 1991). U.S. Bureau of Labor Statistics (2002) statistical data reveal the following findings concerning Latinos in the U.S.: (1) Latinos are the biggest minority group with high rates of poverty (U.S. Census, 2000a), (2) Latinos' socio-economic conditions reveal a lack of upper mobility opportunities (Begun, 2000; Larrain, 2000); U.S. Bureau of Labor Statistics 2000), (3) educationally, Latinos lag behind other minority groups at all levels of education (Llagas & Snyder, 2003; U.S. Census Bureau, 2000a, 2000b), (4) there is a lack of Latino/a role models, leaders, and influential citizens (Gilroy, 2003); (5) labor force projections predict that Latinos will be the highest percentage of all minority labor force projections (Toosi, 2002); (6) Latinos are underrepresented in high status positions but overrepresented in low status positions (Toossi, 2002); and (8) there is a need of Latino leadership in three major areas: Education, business, politics and military (White House Initiative on Educational Excellence for Hispanic Americans, 2000a, 2000b, 2000c).

Furthermore, scholarly research on Latinos reveals that there is a critical shortage on academic research on Latino leadership, specifically on access, retention, and progression (Meier & Steward, 1991). Few Latino/a scholars interested in understanding Latino leadership in the United States have conducted most of the

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research available on Latino leadership. Some of the research, but not all was done in dissertations. For example, Gómez (1996) studied the career development of notable Latinas using grounded theory methodology. Her findings suggested that Latino women's career development centered in Latino culture and acculturation into dominant society. Mata (1997) conducted a multi-method study of leadership development and functioning of Latino community college presidents. His study suggested that Latino leaders define leadership in terms of "people and community" (p. 137) through a participative or shared leadership style, using consideration, thoughtfulness, and communication. Specifically, his study documented that most Latino presidents' leadership approach was participative, collaborative, and directive (p. 140).

Knowlton (1992) conducted an ethnographic study on Latina leadership in chief executive officer positions in community colleges. Her study suggested that Latino/Hispanic leaders are more likely to identify cultural connections with leadership than Anglo peers (p. 278). Further, Knowlton's findings stated, "the leadership behaviors of the Hispanic women presidents were influenced by their gender, their Hispanic culture, and the mainstream culture" (p. 279). Miville (1996) conducted an exploratory investigation of the relationships of cultural, gender, and personality identity of Latinos/as. Her investigation suggested that Latino women's cultural, gender, and personal identities conflicts simultaneously. Vargas (1987) conducted a mixed methodology study on Latinos and Anglos to address the basic leadership behavior differences between American and Latino leaders in the U.S. His

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findings suggested that Latino leaders function generally like their Americans counterparts; and their differences are of 'self-context nature' (e.g., personal leadership behavior and motivation) driven by personality rather than by ethnicity (p. 87).

Most of the literature on Latino leadership lacks of empirical, statistical, and scholarly documented data. Therefore, it is not surprising to see Latino leadership research driven by few dissertations, journal articles (e.g., mostly non scholarly journals), newspaper articles, and headlines news. However, it is imperative that we recognize that Latino women leadership research is critical for the empowerment of Latinas in the labor force, thus leadership research is essential for the development of future Latino women leaders in education, business, and military arenas. There is a need for leadership research on Latino women to enhance leadership development and training, human resources' hiring practices, and organizational culture (Chahin, 1993; Del Pinal, 1997; Flores Niemann et al., 2002); and perhaps suggest the need of increasing the limited number of Latinos with Ph.D.s (Haro, 1983; Reza, 1995; A. Rodríguez, 1999; C. Rodríguez, 2000; R. Rodríguez, 1998; Rosaldo & Flores, 1997), and subsequently increase Latino professors in academia (Haro, 1983; Martínez, 2002; R. Padilla & Chávez Chávez, 1995), as well as Latino educational leaders influencing education policy, research, and administration (MALDEF, 1990a, 1990b; Meier & Steward, 1991; Méndez-Morse, 2000).

U.S. Army Leadership Theory and Practice

Leadership in the U.S. Army is dynamic, doctrinal, and operational. Because of the changes in war and peace operations, leaders are required to follow the Army's leadership doctrine by satisfying four leadership requirements: (1) lead in peace to be prepared for war; (2) develop individual leaders; (3) develop leadership teams; and (4) become decentralized (U.S. Army, 1990). Thus, leadership follows military doctrine founded on operations that enable leaders to develop the necessary knowledge, skills, and attitudes to execute any mission, anywhere, and at anytime.

For Army leaders, their ability to understand the human element and their practice in execution of their operations is a dynamic process followed by doctrine and operational effectiveness. In this process, leaders internalize professional military values (e.g., ethics, morale, integrity, confidence, teamwork) as bedrock of their services (U.S. Army, 1990, p. 1). In order to provide a clear summary of the U.S. Army leadership theory and practice, the following sections address: (a) terminology; (b) concept of leadership; (c) foundations of Army leadership doctrine, theory, and practice; (d) organizational structure and culture; (e) the Army leadership framework; and (f) relationship of Army models of leadership to the MLQ instrument.

Terminology

Ranks. The U.S. Army is divided into four personnel categories that differentiate leadership positions based on ranks, responsibilities, and training: (1) Commissioned Officers, (2) Warrant Officers, (3) Noncommissioned Officers, and (4) Junior Enlisted (Department of the Army, 2004).

Commissioned officers are direct representatives of the President of the United States. They command, establish policy, and manage the Army resources.

Commissioned warrant officers are direct representatives of the President of the United States. They are highly specialized, single-track specialty officers that can command detachments, units, activities, and vessels. They lead, coach, train and counsel subordinates providing valuable skills, guidance, and expertise to commanders and their organizations.

Noncommissioned officers are referred as NCOs. NCOs are the backbone of the Army. They train, lead, and take care of soldiers. They provide advice to officers in every aspect of unit operations. NCOs conduct the Army's daily business as well as command, establish policy, and manage resources.

Junior enlisted are where the rubber meets the road. They are professional soldiers with differentiated military occupation skills, in which duties are performed. They execute orders and perform duties to standard, make spot corrections, and provide support to the best of their abilities, skills, and talents.

Components. The Army is divided in two major components: Active and Reserve. The Reserve is divided in two components: Reserve and National Guard.

The *Active* component is a federal force of full-time soldiers and Department of the Army civilians.

The *Reserve* component is the active component's Federal Reserve force. It consists of combat support and combat service support Soldiers and units that can move on short notice.

The *National Guard* component has a dual mission that consist of both federal and state roles for war, national emergency, and other missions.

Concept of Leadership

The concept of leadership is applied from theory to practice, therein the Army needs leaders who –

"understand human dimension of operations; provide purpose, direction, and motivation to their units; show initiative; are technically and tactically competent; are willing to exploit opportunities and take well-calculated risks…; have aggressive will to fight and win; build cohesive teams; communicate effectively, both orally and in writing; and are committed to the professional Army ethic." (Department of the Army, 1990, p. vi)

Through the nature of the Army's missions, leaders evolve to satisfy the requirements of leadership in both war and peace operations. Based on these operations, leadership is defined as: "a process of influencing others to accomplish the mission by providing purpose, direction, and motivation." (Department of the Army, 1990, p. 1). Further, "leadership is the most essential element of combat

power" (p. 2). Leadership is, thereof, an intense process that can be learned through self-study, education, training, and experience. In this concept, effective leadership must use both direct and indirect influence.

Foundations of Army Leadership Doctrine, Theory, and Practice

Doctrinal factors and principles of leadership are the foundation of the Army leadership theory. In this section, I provide a summary of the: (a) factors of leadership, (b) principles of leadership, and (c) theory of leadership.

Factors of leadership. There are four major factors of leadership, which are always present and affect the actions the leader: (1) the led, (2) the leader, (3) the situation, and (4) communications. Through these factors, leaders accomplish their missions (See Figure 2.1).

Figure 2.1

The Four Factors of Leadership (Department of the Army, 1990)

The Led   **The Leader**

The Situation   **The Communications**
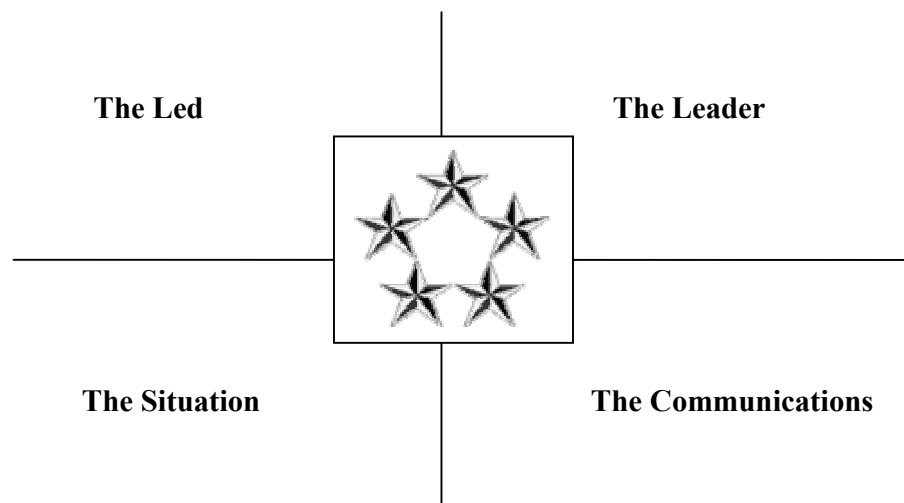
The led refers to the 'soldiers,' those from whom the leader is responsible.

Military doctrine calls for creating a climate that encourages subordinates to actively

participate and want to help the leader accomplish the mission regardless of any

challenges. Mutual trust, respect, and confidence along with encouragement become the

glue between the led and the leader. Specifically, Army standards call for leaders to know

their soldiers, that is to assess each soldier's competence, motivation, and commitment

(Department of the Army, 1990).

The leader refers to all soldiers regardless of their rank (e.g., officers,

noncommissioned officers, and enlisted personnel). As a secondary factor, the leader

must have knowledge of self, specifically strengths, weaknesses, capabilities, and

limitations, while working to improve "the self." With this knowledge, the leader

establishes self-control and self-discipline in order to lead others effectively, while

ensuring that followers are treated with dignity and respect.

The situation is the third major leadership factor, which specifies that all

situations are different, thus leadership actions depend on the situation. The situation

interconnects with leadership style, action, available resources, mission requirements,

personnel level of competence, motivation, and commitment, but more exclusively

timing of actions to accomplish a task.

Communication is the fourth major leadership factor, which reflects on the

exchange of information and ideas. This includes oral and written communication, choice

of words, physical gestures, body language, and voice affect leadership effectiveness.

Thus, communication implies listening, comprehension, and understanding for unit

cohesion and discipline allowing confidence and trust to emerge, and building relationships among soldiers.

The interaction of these factors is associated with leadership decision-making and mission accomplishment. Military leadership theory is founded on the premise that leaders must follow specific principles. These principles are intertwined with self-assessment, study, and experience that improve by the leader's understanding of the four major leadership factors, aforementioned.

Principles of Leadership. The Army leadership principles were developed in 1948 and included in Army doctrine in 1951. The purpose of these principles is to assess 'oneself' as the leader and to develop an action plan to continuously improve one's ability to lead. The following 11 principles serve as guidelines and provide the cornerstone of leadership action for all Army leaders: Know yourself and seek self-improvement; be technically and tactically proficient; seek responsibility and take responsibility for your actions; make sound and timely decisions; set the example; know your soldiers and look out for their well-being; keep your subordinates informed; develop a sense of responsibility in your subordinate; ensure the task is understood; build the team; and employ your unit in accordance with its capabilities (Department of the Army, 1999).

Through these principles, leaders assess' soldiers' competence, commitment, and motivation. As a leader, "you must know who you are, what you know, and what you can do so that you can disciple yourself and lead soldiers effectively" (Department of the Army, 1999, p. 8).

Theory of leadership. In the Army, leadership theory is based on BE, KNOW, and DO. Leaders are expected to understand military standards while pursuing effective leadership results. Results are achieved, through the Army concept of "leadership action." Leadership action calls for three major must's for leaders.

According to military doctrine, leaders must BE, KNOW, and DO. A leaders must *be* a person of strong and honorable character (e.g., determination, compassion, self-discipline, role modeling, initiative, flexibility, consistency); committed to the professional Army ethic (e.g., loyalty, to the nation, the Army, and the unit; selfless service; integrity; duty); an example of individual values (e.g., courage, candor, competence, commitment); and able to resolve complex ethical dilemmas (e.g., interpret the situation; analyze all the factors and forces that apply; choose a course of action that seems best for the nation) (Department of the Army, 1990).

Leaders must *know* the four factors of leadership and how they affect each other (e.g., The Leader, The Situation, The Led, Communications); standards (e.g., sources of Army standards; how standards relate to war fighting); themselves (e.g., personality and performance; strengths and weaknesses; knowledge, skills, and attitude); human nature (e.g., potential for good and bad behavior; how depression and sadness contribute to fear and panic, and how fear affects performance); their jobs (e.g., plan and communicate effectively; supervise, teach, coach, and counsel; display technical and tactical competence; develop subordinates; make good decisions that your soldiers accept; use available systems); and their units (e.g., unit capabilities and unit limitations).

Finally, leaders must (*do*) provide purpose (e.g., explaining the "why" of missions; communicate your intent); direction (e.g., plan; maintain standards; set goals; make decisions and solve problems; supervise; evaluate, teach, coach, and counsel) and motivation (e.g., take care of soldiers; serve as the ethical standard bearer; develop cohesive soldier teams; make soldiering meaningful; reward performance that exceeds standards; correct performance that does not meet standards; punish soldiers who intentionally fail to meet standards or follow orders).

Organizational Structure and Principles

The purpose of the Army is "to serve the American people, protect enduring national interests, and fulfill national military responsibilities" (Department of the Army, 2001); specifically, "to fight and win our Nation's wars" with the goal to achieving sustained land dominance (p. 21). Therein, the Army conducts war time and peace keeping operations to contribute to national security by using a range of military operations. In order to do so, the Army's basic roles and missions are part of the American defense system with specific functions that affect doctrine, organization, and personnel (Command General Staff College, 2002).

According to the Department of Defense Directive 5100.1, the primary function of the Army is to organize, equip, and train forces for the conduct of its missions through Army core competencies. These core competencies are: shape the security environment, prompt response, mobilize the Army, forcible entry operations, sustain land dominance, and support civil authorities (Department of the Army, 1990a, 1990b, 2001, 2003).

However, it is "people who translate the Army's core competencies into capabilities…" The Army's people "are soldiers and civilians, active and reserve, retirees, veterans, and family members – drawn together by shared values and experiences, sacrifice, and selfless service to our Nation." (Department of the Army, 2001, p. 25)

Military organizations are designed in branch/functional concepts (e.g., branch of service) (CGSC, 2002), which link soldiers (e.g., officers, warrant officers, and enlisted) skills, and talents to mission accomplishment.

Military personnel are classified according to the branch of service. There are 23 branches of the Army authorized for active service. These are: Infantry, Air Defense Artillery, Field Artillery, Armor, Aviation, Corps of Engineers, Signal Corps, Military Police Corps, Chemical Corps, Military Intelligence, Adjutant General's Corps, Finance Corps, Quartermaster, Ordnance, Transportation, Chaplain Corps, Judge Advocate General's Corps, Medical Corps, Dental Corps, Veterinary Corps, Medical Service Corps, Army Nurse Corps, and Army Medical Specialist Corps. Combat arms are directly involved in the conduct of actual fighting; these are: Infantry, Air Defense Artillery, Field Artillery, Armor, Aviation, and Corps of Engineers. Combat support arms are those which provide operational assistance to the combat arms; these are: Signal Corps, Military Police Corps, Chemical Corps, and Military Intelligence.

Combat service support branches are those which provide logistical and administrative support, usually not engaged in combat operations. These are: Adjutant General's Corps, Finance Corps, Quartermaster, Ordnance, Transportation, Chaplain Corps, Judge Advocate General's Corps, Medical Corps, Dental Corps, Veterinary Corps, Medical Service Corps, Army Nurse Corps, and Army Medical Specialist Corps. In addition, there are two branches which only exist in the Reserve component: Staff Specialist and Civil Affairs (Crocker, 1995).

The Army is composed if two distinct and equally important components: the active and the reserve components. The reserve components are the U.S. Army Reserve and the Army National Guard. For the purpose of this study, the research emphasizes the active duty component.

Regardless of component, the Army conducts operational and institutional missions. The operational side consists of numbered armies, corps, divisions, brigades, and battalions that conduct operations around the world. The institutional side supports the operational Army by providing the necessary infrastructure to raise, train, equip, deploy, and ensure its readiness (Department of the Army, 2001). For these purposes, the Army follows specific and comprehensive doctrines for assessing current capabilities and management of change, called Army Imperatives. There are six imperatives: doctrine (e.g., institutional schooling, training, and methodology), organizations (e.g., type), materiel (e.g., capabilities), leader development (e.g., requirements), training (e.g., standards), and Soldiers (e.g., human resources and their needs) (p. 27).

Therefore, education, training, and development are critical tasks of the military organization at all levels. Specifically, "training the force" is the Army's standard training doctrine. Leader training is imperative at every echelon. Subsequently, training is a result of Army doctrine, which emphasizes its doctrine through the principles of training. These principles are: train as combined arms and service teams (e.g., teamwork among branches at all levels), train as you fight (e.g., achieve standards), use appropriate doctrine (e.g., conform to Army doctrine), use appropriate performance-oriented training (e.g., proficiency of skills), train to challenge (e.g., build competence and confidence

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while challenging leaders intellectually, physically, and emotionally), train to sustain proficiency (e.g. collective or individual maintenance of proficiency), train using multi-echelon techniques (e.g., use available resources), train to maintain (e.g., keep equipment and personnel ready at all times) (Department of the Army, 2001).

The principles of training provide guidance for mission essential tasks (METL), planning, and execution of long/short/near terms trainings along with evaluations, after-action reviews, and feedbacks (Department of the Army, 1988). For instance, military officers will under go the following trainings: Officer Basic Course, Officer Advance Course, CAS3, CSGSC, War College, and other specialized training as required for their duties and responsibilities.

The Army Leadership Framework

Army leadership framework refers to the model of leadership that characterizes the military personnel regardless of rank. It serves as a basis for leadership development and training, at the core of military leadership achievement. Leaders are expected to have competencies of self-awareness and adaptability through character and knowledge.

The military leadership framework posits that leadership beings with what the leader must BE – the Army values and attributes that shape the leader's character and style. However, leaders are expected to – KNOW, not only their jobs, but to be fully qualified in interpersonal, conceptual, technical, and tactical skills that compose the soldier's knowledge of the military profession. Therein, Leaders must have competency in a range of human activities that, by the nature of military operations, become more

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complex with positions of greater responsibility. Leadership demands application, action

to - DO what is needed to be done, often in complex and dangerous conditions

(Department of the Army, 2004). Therefore, "action is the essence of leadership" (p. 1-

23) in which, the Army operates, functions, and executes. The leadership framework

show the relationship of values, attributes, skills, and actions to BE, KNOW, and DO

(See Figure 2.2).

Figure 2.2

The Army Leadership Framework (Department of the Army, 2004)

THE LEADER		
Of character and competence acts to achieve excellence by…		
BE	**KNOW**	**DO**
Values	**Attributes** **Skills**	**Actions**
Loyalty Duty Respect Selfless Service Honor Integrity Personal Courage	Mental Interpersonal Physical Conceptual Emotional Technical Tactical	Influencing Operating Improving

Relationship of Army Model of Leadership to the MLQ Instrument

"*Everybody's got to know how to be a leader*" GEN. Peter J. Schoomaker (2004). The Army leadership framework posits that the Army model of leadership must be influential, motivational, and transformational, and therein, effective, efficient, and competent while maximizing the Army values and soldiering skills into combat/peace operations at anytime in anywhere. This ready-to-go leader is expected to influence, operate, and improve the organization, the mission, and its personnel as well as resources for the success of the mission, beyond personal interests. The Army leadership requires each soldier to strive for excellence and achievement. More specifically, through the Army leadership model, leaders are told: "to be a good leader, know your job, yourself, and know your fellow soldiers" (Department of the Army, 2004, p.1-24).

As an example, the Army's leadership model is the basis for the soldier's creed that states clearly the model of leadership in which the Army's craft is made off:

"I am an American Soldier. I am a Warrior and a member of a team. I serve the people of the United States and live the Army values. I will always place mission first. I will never accept defeat. I will never quit. I will never leave a fallen comrade. I am disciplined, physically and mentally tough, trained and proficient in my warrior tasks and drills. I always maintain my arms, my equipment, and myself. I am an expert and I am a professional. I stand ready to deploy, engage, and destroy the enemies of the United States of America in close combat. I am a guardian of freedom and the American way of life. I am an American Soldier."

(U.S. Army, The Soldier's Creed)

The model of leadership of today's U.S. Army is transformational. Avolio and Bass (2004) posited that U.S. military is driven by transformational leaders. Bass's book on U.S. Army leaders, entitled *A new paradigm of leadership: An inquiry into transformational leadership* (1996), established that since 1980s, empirical research on military services (e.g., Army, Navy, Air Force and Marine Corps) indicate that military leaders use transformational leadership behaviors along with transactional leadership behaviors to achieve leadership outcomes. Through these multiple-range leadership behaviors, Bass argues that military leaders influence subordinate's extra effort, commitment, satisfaction, and contribution to the military.

Military leadership is conceived as charismatic in attribution or behavior, intellectually stimulating, or individually considerate (Bass, 1996). The leadership model (military) portrays transactional leadership as contingent reinforcement as a form of promises and rewards, or threats and disciplinary actions (e.g., contingent reward in the MLQ). Therein, the relationship of the MLQ and the Army leadership model seems to suggest an almost identical leadership behavior that supports the use of the MLQ instrument for this research study.

Leadership and Acculturation Instrumentation

In the past 20 years, there has been considerable interest in developing instruments used in measuring leadership, acculturation, and individualism/collectivism (I-C). Various models of instruments have been used to understand, assess, and measure styles, dimensions, models, and approaches. Listing all instruments is not the scope of this review. In this section, I provide the following: (1) synopsis of the most current instruments, (2) summary of instruments' selection, and (3) constructs and definitions of the study instruments.

Synopsis of the Most Current Instruments

The review of the literature did not reveal any instrument that measures leadership, acculturation, and individualism/collectivism (I-C), particularly of Latinos/as. Additionally, the review of the literature on instruments of leadership, acculturation, and I-C revealed numerous instruments, questionnaires, and surveys with different research approaches that target specific ethnic groups or populations (e.g., White, African or Black, Asian, Mexican, Cuban). Specifically, the literature contains few instruments that targeted Latino/Hispanics as a group. Most of the instruments were found to be specific to a Latino/Hispanic sub-ethnic group (e.g., Mexican, Cuban). The review of the literature revealed eight instruments for leadership, seventeen for acculturation, and six for I-C (See Table 2.1).

Table 2.1

Current Leadership, Acculturation, and Individualism/Collectivism (I-C) Instruments

Area of Interest	Instrument
Leadership	Ethical Leadership Scale (Brown & Treviño, 2002). Campbell Leadership Index (Campbell, 1991). Leader Behavior Analysis II (Zigarmi, Edeburn, & Blanchard, 1993) Leader Effectiveness and Adaptability (LEAD) Questionnaire (Hersey & Blanchard, 1976). Leader Behavior and Descriptor Questionnaire (Stogdill & Coons, 1957). Leadership Practices Inventory (Krouzes & Posner, 1988). Leader Member Exchange (LMX) Questionnaire (Graen & Uhl-Bien, 1995). Machiavellianism Scale (MACH V) (Christie & Geiss, 1970). Multifactor Leadership Questionnaire (Bass & Avolio, 2000). Path-Goal Leadership Questionnaire (House, 1996; House & Mitchell, 1974). Survey of Leadership Practices (Wilson & Wilson, 1989). Visionary Leader: Leader Behavior Questionnaire (Sashkin, 1996).
Acculturation	Acculturation Rating Scale for Mexican Americans (ARSMA) (Cuéllar, Harris, & Jasso, 1980). ARSMA II (Cuéllar et al., 1995). A Multidimensional Measure of Cultural Identity for Latino and Latina Adolescents (Felix-Ortiz, Newcomb, & Myers, 1994). Behavioral Acculturation Scale & Value Acculturation Scale (Szapocznik, Scopetta, & Aranalde, 1978). Bicultural Involvement Scale (Szapocznik, Scopetta, Aranalde, & Kurtines, 1978). Bi-dimensional Acculturation Scale for Hispanics (Marín & Gamba, 1996). Brief Acculturation Scale for Hispanics (Marín, Sabogal, VanOss Marín, Otero-Sabogal, & Perez-Stable, 1986). Comfort with Acculturation Scale (Montgomery, Arnold, & Orozco, 1990). Cuban Behavioral Identity Questionnaire (Garcia & Lega, 1979). Cultural Life Style Inventory (Mendoza, 1989). LAECA Acculturation Scale (Burman, Telles, Karno, & Escobar, 1987). Padilla's Acculturation Scale (A. Padilla, 1980). Psychological Acculturation Scale (Tropp, Erkut, García Coll, Alarcón, & Vázquez García, 1999). Short Acculturation Scale for Hispanics (Marín et al., 1986).
Individualism and Collectivism (I-C)	Horizontal and Vertical Individualism and Collectivism Scale (Triandis & Gelfand, 1998). Culture and Individualism-Collectivism Scale (Hofstede, 2001). Individualism and Collectivism Inventory (Singelis, Triandis, Bhawuk, & Gelfand, 1995). Measurement of individualism and collectivism (Hui, 1988). Measurement of Values and I-C (Schwartz, 1992, 1994).

Summary of Instrument Selection

Through an analysis of the constructs measured by each instrument the potential validity and reliability for a general Latino sample, I identified three main instruments best suited for the scope of the study. In addition to validity and reliability, these three main instruments were identified by factors of suitability, readability, ease of use, and connection to the purpose of the study as well as the scope of the sample. Additionally, other factors such as similarities of range, instrument development, and practicality of length were taken under consideration when choosing among the above mentioned instruments. The instruments used for this study are presented in Table 2.2. Additionally, detailed information of these instruments and why they were selected is presented in Chapter II. These instruments were selected because they are connected to the theoretical framework of this study. The theoretical framework for the study addressed qualities of leaders, their acculturation style, and their approach to the task (e.g., individualism/ collectivism). The instruments operationalized the conceptual framework of this study by measuring leadership, acculturation, and individualism-collectivism styles. Chapter III.

Table 2.2

Instrumentation Used for Research Study

Instrument	Items and Scales	Description		
MLQ Form 5x **Multifactor Leadership Questionnaire (Short Form, Self-Rated)**	45 items with 12 sub-scales measures four dimensions of leadership Range 0 to 4	**Transformational Behaviors** Idealized Influence (Attributed) Idealized Influence (Behavioral) Inspirational Motivation Intellectual Stimulation Individualized Consideration	**Transactional Behaviors** Contingent Reward Management-by-exception (Active) Management-by-exception (Passive) Laissez-faire-Leadership	**Leadership Outcomes** Extra Effort Effectiveness Satisfaction
ARSMA II	30 item with four sub-scales 18 items with 2 axes and 4 quadrants Range 1 to 5	**Scale I** Latino Oriented Anglo Oriented	**Scale II** Latino Marginality Anglo Marginality Latino/Hispanic American Marginality	
I-C Scale	27 items for dimensions vertical and horizontal Range 1 -5	**Vertical Dimension** Vertical Individualism Vertical Collectivism	**Horizontal Dimension** Horizontal Individualism Horizontal Collectivism	

Multi-Factor Leadership Questionnaire (MLQ)

The MLQ measures the range of leadership behaviors based on transformational leadership, transactional leadership, and non-leadership behaviors as well as leadership outcomes. Based on these leadership behaviors, the full-range of leadership indicates the profile of the leader, which provides a picture of the leader's style. In order to provide a clear understanding of the MLQ constructs, I present a brief description of each leadership behavior component and their factors, and leadership outcomes. Additional details are presented in Chapter III.

Transformational Leadership

Transformational leaders are proactive, raise follower awareness for transcendent collective interests, and help followers achieve extraordinary goals. Transformational leadership is measured by five leadership behavior constructs or 5Is: *idealized influence (Attributed), idealized influence (Behavior), inspirational motivation, intellectual stimulation*, and *individualized consideration*. These leadership behaviors are associated with high levels of effectiveness. Idealized Influence (Attributed) refers to the socialized charisma of the leader, whether the leader is perceived as being confident and powerful, and whether the leader is viewed as focusing on higher-order ideals and ethics. Idealized Influence (Behavior) refers to charismatic actions of the leader that are centered on values, beliefs, and a sense of mission. Inspirational motivation refers to the ways leaders energize their followers by viewing the future with optimism, stressing ambitious

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goals, projecting an idealized vision, and communicating to followers that the vision is achievable. Intellectual stimulation refers to leader actions that appeal to followers' sense of logic and analysis by challenging followers to think creatively and find solutions to difficult problems. Individualized consideration refers to leader behavior that contributes to follower satisfaction by advising, supporting, and paying attention to the individual needs of followers, and thus allowing them to develop and self-actualize.

Transactional Leadership

Transactional leadership is an exchange process based on the fulfillment of contractual obligations and is typically represented as setting objectives and monitoring and controlling outcomes. Transactional leadership is measured by three leadership behavior constructs: *Contingent Reward, Management-by-Exception (Active), and Management-by-Exception (Passive).* These leadership behaviors are associated with increasing quality in exchange between the leader and the follower (Bass & Avolio, 1999). The exchange between the leader and the follower can take two forms: passive or active.

Contingent Reward (i.e., constructive transactions) refers to leader behaviors focused on clarifying role and task requirements and providing followers with material or psychological rewards contingent on the fulfillment of contractual obligations. This style of leadership is the most constructive and effective style of transactional leadership, which exhibit proactive leadership behavior (Bass & Avolio, 1999). Management-by-Exception (Active) (i.e., active corrective transactions) refers to the active vigilance of a leader whose goal is to ensure that standards are met. Management-by-Exception (Passive) (i.e.,

passive corrective actions) refers to leadership behaviors in which leaders only intervene after noncompliance has occurred or when mistakes have already happened.

Non-Leadership

Non-leadership is a style in which the individual avoids taking the initiative. Non-leadership is measured by one leadership behavior construct: *laissez-faire*. This style of leadership is "hand-off" and aims at avoidance of leadership (Bass & Avolio, 1999). *Laissez-faire leadership* refers to the absence of a transaction of sorts with respect to leadership in which the leader avoids making decisions, abdicates responsibility, and does not use their authority. It is considered active to the extent that the leader "chooses" to avoid taking action. However, this component is generally the most passive and ineffective form of leadership.

Leadership Outcomes

Leadership outcomes are a reflection of the exchange process based on the fulfillment of contractual obligations and is typically represented as setting objectives and monitoring and controlling outcomes along with motivational and inspirational factors that produce a leadership outcome. Leadership outcomes are measured by three leadership constructs: *extra effort*, *effectiveness*, and *satisfaction*.

Extra Effort refers to extra-effort provided in leadership. *Effectiveness* refers to effective leadership. *Satisfaction* refers to satisfaction dimension of leadership outcome.

Full-Range of Leadership Profile (Individual Level)

The full range leadership model posits that "leadership is conceived as a continuum of activity ranging from non-leadership to transactional leadership to transformational leadership." (Bass & Avolio, 1999, p. 18) According to Avolio and Bass (2000), "most leaders' profile includes transformational and transactional leadership" (p. 7). When the leader displays higher frequencies of transactional leadership styles and less transformational leadership behaviors, the leaders' full range of leadership is not an optimal profile. But, when the leader displays higher frequencies of transformational and less of transactional, the leaders' full range of leadership is considered to be an optimal profile. (Bass & Avolio, 2002, p. 4)

In the full range model, all styles of leadership may be appropriate depending on the situation (Bass & Avolio, 1999). Research shows that leaders who demonstrate transformational behaviors produce better results and generate more commitment and satisfaction (Antonakis, Avolio, & Sivasubramaniam, 2003; Avolio, 1999b; Bass, 1997; Bass & Avolio, 1999). Through the full range of leadership, leaders exhibit different leadership behaviors that characterize their leadership style.

Further, the full range leadership model provides the basis of individual orientation to the leader's transformational, transactional, and non-leadership behaviors that encompasses the leader's style. Specifically, it identifies the constructs in which a full range of choices are made when it comes to leading that establish a continuum of leadership styles (Avolio & Bass, 1991, 2004; Bass & Avolio, 1999). This model attempts to provide a picture of the leader's style that helps in describing the individual's leadership

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behaviors with the framework of transformational, transactional, and non-leadership styles.

Acculturation Rating Scale for Mexican Americans-II (ARSMA-II)
(Revised for Hispanics/Latinos for this study)

The ARSMA II was revised for the purpose of this study to target Hispanic/Latino culture instead of Mexican American. This instrument independently measures cultural orientation toward Latino and Anglo cultures by establishing the acculturation orientation towards that culture. The ARSMA II measures three acculturation orientations: Anglo Orientation, Latino Orientation, and Marginal Orientation. These orientations of the individual reflect language use and preference, ethnic identity and classification, cultural heritage and ethnic behaviors, and ethnic integration (Cuéllar et al., 1995).

Additionally, ARSMA II measures behavioral aspects of acculturation through an assessment of positive and negative affirmation of ethnicity (e.g., "I like to identify myself as…" and "I have difficulty accepting…") (Cuéllar et al., 1995, p, 282), which depicts the acculturation and marginalization of the individual. More specifically, according to the theory behind the ARSMA II acculturation results when "groups of individuals having different cultures come into continuous first-hand contact, with subsequent changes in the original cultural patterns of either or both groups" (Cuéllar et al., 1995, p, 278). In order to provide a clear understanding of the ARSMA II constructs, I present a brief description of the three acculturation orientations. Additional details are presented in Chapter III.

Acculturation Orientations

The ARSMA II is divided into three acculturation orientations based on cultural orientation: *Latino Orientation, Anglo Orientation,* and *Marginalization Orientation* (e.g., by Latino, Anglo, and Latino/Hispanic American identity). Latino Oriented refers to Latino/Hispanic (e.g., Spanish-speaking) culturally oriented individuals who relate more to Latino culture. Anglo Oriented refers to Anglo or White (e.g., non-Spanish-speaking) culturally oriented individuals who relates more to Anglo culture. Marginalization oriented refers to the psychological state in which "acculturating individuals give up their original ethnic/cultural identification with another group only to discover that they are rejected or otherwise not accepted by the group to which they were acculturating" (Cuéllar et al, 1995, p. 279).

Furthermore, marginalization orientation is divided into three cultural heritage/ethnic behaviors orientations: Anglo, Latino, and Latino/Hispanic American. Anglo Marginalization refers to Anglo or White (e.g., non-Spanish-speaking) culturally oriented individuals who identify themselves as Anglo/White marginalized. Latino Marginalization refers to Latino/Hispanic (e.g., Spanish-speaking) culturally oriented individuals who identify themselves Latino marginalized. Latino/Hispanic American Marginalization refers to U.S. Latino/Hispanic (e.g., both Spanish-English speaking) culturally oriented individuals who identify themselves as Latino/Hispanic American marginalized.

Horizontal and Vertical Individualism/Collectivism Scale

This instrument measures both horizontal and vertical individualism and collectivism behaviors. It is a self-rated questionnaire that depicts attributes of individualism and collectivism. Attributes of individualism and collectivism emphasize self- identity and relationships with others. In this instrument these attributes are scaled into vertical and horizontal dimensions. These dimensions, vertical and horizontal, are related to societal cultural norms that give weight to I-C attributes (Triandis, 1989). In order to provide a clear understanding of the Horizontal and Vertical Individualism/ Collectivism Scale composition, I present a brief description of the constructs that define the behaviors within this scale. Additional details are presented in Chapter III.

Individualism and Collectivism Orientations

Individualism refers to individuals' identity on self-reliance, competition, emotional distance from in-groups, and hedonism. Collectivism refers to individuals' identity on interdependence, family integrity and sociability.

Horizontal and Vertical Orientations

Horizontal dimensions emphasize equality. There are two sub-dimensions: Individualism and Collectivism. Horizontal Individualist individuals "want to be unique and distinct from groups and are highly self-reliant, but are not interested in becoming distinguished or in having high status" (Triandis & Gelfand, 1998, p. 119). Horizontal

Collectivist individuals "see themselves as being similar to others and emphasize common goals with others, interdependence, and sociability, but they do not submit easily to authority" (p. 119).

Vertical dimensions emphasize hierarchy. There are two sub-dimensions: Individualism and Collectivism. Vertical Individualist individuals "want to become distinguished and acquire status, and they do this in individual competitions with others." (Triandis & Gelfand, 1998, p. 119) Vertical Collectivist individuals "emphasize the integrity of the in-group goals, and support competitions of their in-groups with out-groups. If in-group authorities want them to act in ways that benefit the in-group but are extremely distasteful to them, they submit to the will of these authorities". (p. 119)

Chapter III: Research Method and Design

Methodology

The purpose of this research was to examine the relationship of self-perceived leadership, and acculturation and individualistic/collectivistic attitudes in a sample of active duty Latina Officers in the United States Army. Using a correlational design, the study aimed at investigating how acculturation and individualistic/collectivistic attitudes relate to leadership by examining the relationship between leaders' self-perceived leadership behavior (e.g., knowledge, skills, and attitudes) and orientation of acculturation, and individualism/collectivism dimensions. This research further examined the relationship between personal characteristics, leadership, and acculturation of Latina leaders in the U.S. Army. Personal characteristics were divided into background information on the respondent (e.g., rank, time in service, education) and information about the respondent's perception of their leadership. A diagram of the study is present in Appendix A.

The examination of background information was important because it assisted in identifying characteristics and factors contributing to relationships between leadership and acculturation. Specifically, the study aimed at asking the respondents to identify those leadership behaviors that reflect their leadership style, using the Multifactor Leadership Questionnaire (MLQ 5X, Leader Form, Self-Rated) developed by Bass and Avolio (Bass & Avolio, 2000). Leadership was defined by 10 general constructs identified in the MLQ. These constructs were: *Idealized Influence (Attributed), Idealized Influence (Behavior), Inspirational Motivation, Intellectual Stimulation, Individual*

Consideration, Contingent Reward, Management-by-Exception (Active), Management-by-Exception (Passive), Laissez-Faire Leadership and *Leadership Outcomes* (e.g., *Extra Effort, Effectiveness,* and *Satisfaction*) (Bass & Avolio).

Acculturation was defined by 5 general constructs identified in the Acculturation Rating Scale for Mexican Americans II (ARSMA II) developed by Cuéllar, Arnold, and Maldonado (1995). These 5 constructs were: *Latino Orientation, Anglo Orientation, Latino Marginality Orientation, Latino/Hispanic American Orientation* and *Anglo Marginality Orientation*. Although Cuéllar et al.'s acculturation scale (ARSMA II) was initially designed for use with the Mexican American population; this instrument was adapted for use with Latina Americans by conducting a small pilot study that examined its psychometric properties. ARSMA II adaptation is discussed in the pilot study section.

The Individualism/Collectivism Scale (I-C) defined the leader's individualism and collectivism constructs that emphasized personal or collective aspects in the definition of self (Triandis, 1989); and independent or inter-related personal goals and orientation of values (Markus & Katiyama, 1991). Measurements of horizontal and vertical individualism and collectivism were obtained through the I-C scale developed by Triandis and Gelfand (1998). I-C is defined by two methods of measurements: *Horizontal* (i.e., emphasizing equality) and *Vertical* (e.g., emphasizing hierarchy) with 6 constructs (i.e., competition, emotional distance in groups, family integrity, hedonism, interdependence, self-reliance, sociability) within 4 dimensions (i.e., horizontal individualism, horizontal collectivism, and vertical individualism, vertical collectivism).

Psychometric properties present high levels of reliability and validity, suggesting good applicability of this scale.

In order to explain the design of this study, I will address the following essential components of the methodology: (a) research questions, (b) research design, (c) sampling plan, (d) data collection procedures, and (e) data analysis.

Research Questions

The following research questions served as a general guide to facilitate the exploration of the research problem, arising from a conceptual framework that encompasses leadership theories, culture, and identity.

1. What are Latino women's self-perceptions of their leadership style?

2. How does acculturation relate to leadership? Specifically, what is the relationship between acculturation and Latino women's self-perceptions of their leadership style?

3. What is the relationship of individualism/collectivism on the relationship between leadership and acculturation? Specifically, how do individualism and collectivism relate to Latino women's self-perceptions of their leadership style?

Research Design

This study used a quantitative, descriptive, and exploratory research approach (Creswell, 1998). The intent of this tradition of inquiry is "to get a picture of a situation, behavior, or attitudes before planning future research" (Kane & O'Reilly-De Brún, 2001, p.34) that can shed light on how Latino women view their leadership. Descriptive

research, as a methodology, is particularly suited to explore questions regarding Latino women's leadership, and acculturation, including individualism-collectivism dimensions, for example: 'What is happening?' 'What has happened?' 'What do people think?' (p. 34).

I used quantitative methods to explore the relationships between leadership and acculturation in Latinas in military leadership positions (i.e., officers). I interpreted the data obtained through quantitative descriptive methods to systematically formulate processes that explored and described participants' responses. This data provided a meaningful explanation of how Latinas lead, and their relationship between leadership and acculturation. This type of approach enabled theory testing and confirmation (Campbell & Stanley, 1963; Cook & Campbell, 1979). Quantitative research can also be used to generate hypotheses and develop theories (Rosenthal & Rosnow, 1969).

Sampling Plan and Pilot Study Design

"A sample consists of a subset of elements from the population selected according to a sample design, which specifies the rules and operations by which the sample is to be chosen from the population" (Pedhazur & Schmelkin, 1991). In this study, I used census data from the Department of the Army (e.g., female officers, active duty, Latino/Hispanic background) based on considerations of feasibility and availability, specifically because it is possible to estimate sample errors (Pedhazur & Schmelkin). The census data sampling strategy is appropriate because I was not attempting to describe a population but rather to

examine relationships among variables. In this section, I discuss: (a) sampling strategy,
(b) participants, (c) procedures, and (d) pilot study design.

Sampling Strategy

Currently, there are approximately 650 Latina officers on active duty in the entire
U.S. Army (U.S. Army Research Institute for the Behavioral and Social Sciences [ARI],
Army Personnel Survey Officer [APSO], 2004; Dr. L. Milan, personal communication,
February 20, 2004). A census of all non-deployed Latina officers was conducted as a
sampling strategy in order to obtain participants that matched with the criteria for the
study. This census provided up-to-date data as well as personal information on possible
participants that specifically corresponded with the research criteria. The APSO provided
a comprehensive census listing of Latino/Hispanic female officers on active duty who
were non-deployed. This listing included possible participants' rank, name, ethnic/race
(i.e., Hispanic/Latino), sex (i.e. female), unit address or home/current mailing address.

APSO's census data showed that there were 558 Latina officers on active duty
(non-deployed). Of these 558 officers, 46 were warrant officers thus did not meet the
criteria for participation); 52 officers had incomplete contact address information; and
one officer did not provide a complete survey. Therein, a total of 459 possible
participants remained.

As a member of the U.S. Army (Reserve), I had access to military sites that
provided right of entry to retrieve confidential information on military personnel,
available in the military white pages. Possible participant's addresses were verified prior

to proceeding with any contacts. I conducted a white pages search of all 52 officers who were listed in the census data without address/e-address. I found their contact information, bringing the total to 511 possible participants. Additionally, I contacted the U.S. Army website manager (www.ako.mil) and posted an announcement of my research study. The AKO announcement provided further visibility and credibility, and increased the participation rate as well as inquiries for participation and information on the research. With the AKO announcement I obtained over 537 inquiries, but 13 officers were selected (verified with census data listing), thus bringing the total to 524 officers for participation. See AKO posting (Appendix D).

Participants

In order to enhance credibility and generalizability of results, efforts were made to obtain individuals representative of the population with as much heterogeneity as possible. Participants were to be: (1) 18 years old or older; (2) in the U.S. Army (active duty service); (3) a Latino/Hispanic woman of any Latino sub-group and any race, religion or beliefs; (4) an officer (O-1 and above); (5) with any military occupation skill or branch; (6) in any military leadership position self-defined by Command; and (7) who voluntarily wishes to participate and can be reached via mail or e-mail.

A total of 524 Latina active duty officers were selected for participation. I mailed or e-mailed a total of 524 surveys and a total of 375 surveys were returned (149 did not respond). The expected participation rate was estimated to be 50% but we obtained 72%.

Participants were expected to respond to a 30-45 minute questionnaire/survey within the posted deadline for submission, and were offered survey results in appreciation for their timely response. Participants were selected through the APSO and ARI.

Procedures

Researcher obtained ARI sponsorship. ARI sponsorship provided two main functions: (1) support in establishing credibility of the study by obtaining APSO's approval; and (2) advice and assistance with necessary census data. Formal approval from the APSO was obtained to conduct the proposed research survey; (i.e., under the provisions of Army Regulation 600-46, the researcher completed a *Request for Approval to Survey Department of the Army Personnel Form*) (see Appendix B). APSO reviewed the research study methodology and within two-weeks granted permission to conduct the study; coinciding with University of Maryland Individual Review Board's (IRB) approval.

Additionally, APSO granted authorization to use military personnel as human subjects for the purpose of a research investigation within the U.S. Army total force (i.e. active duty) through the Defense Manpower Data Center (Department of the Army, 1979). Census data from the Defense Manpower Data Center were used to identify Latina officers (e.g., by rank, Latino/Hispanic ethnicity/race, gender, age) who met the criteria for participation. APSO obtained personnel current postal addresses and provided the listings to the researcher for further verification.

I conducted a verification of address by using the U.S. Army AKO web-mail white pages (e.g., https://www.us.army.mil/portal/portal_home.jhtml - Army Knowledge

On-Line WEB-Mail Access for all U.S. Army Personnel World-Wide). A postcard was mailed or e-mailed to each officer. This advanced postcard was used as a strategic instrument to verify AKO e-mail and postal addresses to maximize contact with participant.

After the verification of mail and e-mail addresses was completed, I started the mailings by stage (See Appendix D). Mailings were mailed or e-mailed (per participants' convenience or address availability); and collected at the home address of the researcher. Surveys were printed on a yellow colored 7.25 x 10.50 sized paper, totaling 8 pages. Stamps were used according to the weight of each mailing item. Mail was sent via First-Class postage with free forwarding service (e.g., to addressee). Postage was 23¢ for postcards, 37¢ for reminder letters, 60¢ for reply self-address envelopes (for completed surveys), and 83¢ for the survey. All costs were borne by the researcher.

Pilot Study Design

"A pilot survey is an essential part of every survey research study. A pilot survey is a miniature 'dry run' of the main survey" (Jaeger, 1984). The intention of this pilot survey was multipurpose: (1) to examine psychometric properties and adapt it for use with Latinos/Hispanic Americans; (2) to determine the response rate or cooperation rate likely to be encountered in the main survey; (3) to formulate judgment on the feasibility of the main survey, examine the clarity and adequacy of the survey; and (4) to detect any problems, confusions, or ambiguity.

For this pilot survey, other sources served to create a rich pool of participants. These included the Women Research and Education Institute (WREI), the National

Hispana Leadership Institute (NHLI), the University of Maryland, the AKO, and U.S. Army Reserve. I used convenience sampling and selected 25 Latino women leaders to participate in the pilot study.

The pilot survey participants were: ten Latina UMCP undergraduate students; eleven Latina professionals; three Latina Reserve and National Guard officers (with prior military active-duty service) and one U.S. Army (Active) Ph.D. Latina women officer (with research expertise). These participants were asked to complete the demographic and the leadership questionnaires (the leadership questionnaire included acculturation and individualism/collectivism scales). There were no major changes to the survey. ARSMA II was changed to Latino/Hispanic instead of Mexican.

Data Collection Procedures

In this section, I describe the types of data that was collected and the procedures

of data collection. Specifically, I will address the following: (a) method of data collection

and procedures, (b) measures, and (c) confidentiality and ethical issues.

Method of Data Collection and Procedures

The method of data collection is based on three questionnaires (Appendix E, F,

and G), and a demographic questionnaire (Appendix H). Surveys were conducted and

guided by the survey protocol (Bogdan & Biklen, 1998) presented in Appendix C. Data

were collected from individuals through postal surveys. I used three different

questionnaires (i.e., acculturation levels and leadership styles, and individualistic -

collectivistic attitudes) and one demographic questionnaire, which encompassed the

survey used in this study.

An advance postcard was sent to each possible respondent. The purpose of the

advanced invitation was to introduce the study, welcome participation, and provide

participants with a choice to respond to either a postal survey or an e-mail attachment,

controlled by the researcher with survey code identification. Postcards were mailed or e-

mailed according to the participant's addresses (e.g., postal or e-mail) availability.

I used five mailing stages (Appendix D). The first mailing stage contained the

University of Maryland cover letter with sponsors' endorsements, researcher's cover

letter, and a copy of the survey with a return stamped, self-addressed envelope, all in a

business-sized envelope. The cover letter indicated that each participant would receive a copy of their results, which was a strategy towards three motivational goals for survey completion: (1) provided a contribution to Latino women's leadership research; (2) offered survey results as an incentive; and (3) prompted action for timely survey reply. Furthermore, it maintained complete confidentiality for the respondents' returned surveys while letting the researcher know who has or has not retuned the surveys. In this way, reminders were sent only to those participants who did not respond, and survey results to those who did respond.

The second mailing stage was a reminder postcard, sent a week after the initial mailing. This mailing asked for their cooperation, thanked them for their time, and offered them access to the Researcher's AKO web-mail address for additional information or request a copy of survey (e.g., if participant has lost the materials). This mailing went to all participants who did not respond to the initial survey mailings.

The third mailing stage was conducted after re-corroboration of non-respondents' mailing addresses. Non-respondents were e-mailed a copy of the invitation to participate using the AKO military e-mail address directory to verify the participant's mailing address. The third mailing stage was then conducted, three weeks after the second mailing stage. This third mailing included a copy of the cover letter, a survey, a self-stamped return envelope, along with an offer to participate.

The fourth mailing stage was conducted to thank all participants and remind them to send their completed surveys by a specific deadline. The fifth mailing stage was conducted to provide a final reminder of deadline and motivate participant's to return the

completed surveys via e-mail or fax. These two mailing stages were done via e-mail to participants who did not respond to earlier mailings.

The final mail was conducted to send the survey results to each participant. This mail was done via e-mail. The mailing provided explanation of the results and additional information regarding the full-range of leadership. It offered a bibliography for further reading, and the researcher's contact information for the participant's questions, comments, or suggestions.

Method of data collection followed the U.S. Army regulations and directives: (1) AR 70-25 Use of Volunteers as Subjects of Research [1990]; (2) AR 70-74 Independent Research and Development [1984]; and (3) AR 600-46 Attitude and Opinion Survey Program [1979]). Additionally, each mailing offered participants their survey results as a token of gratitude in hopes of enhancing timely rate of response (See Appendix C and D).

Data were collected and stored in compartmented files. Back-up file systems were created in both computerized and paper formats. In the computerized form, copies of all documents were saved on a zip-drive disk and CD-diskette with a back-up file system on the hard drive of the researcher's home computer. In paper form, copies of all documents were printed, labeled and filed in a cabinet. Data were processed with an Excel spreadsheet and analyzed using a statistical analysis package called SPSS.

Measures

   Leadership. The Multifactor Leadership Questionnaire (MLQ) Form 5X-Short,

self-starter by Bass and Avolio (2000) was used to measure leadership behaviors of

Latino/Hispanic women in the military (Appendix E). The MLQ was developed initially

to measure transformational and transactional leadership; and has been revised several

times since 1985. The most recent revision, the MLQ Form 5X, measures a full range of

leadership styles (Bass & Avolio). This revision was chosen for use in this study for three

fundamental reasons: (1) it assesses leadership style/behavior; (2) it has not been used on

Latino/Hispanic women in the military; and (3) it is uncomplicated for both the

respondent and the researcher.

   The MLQ Form 5X consists of 45 items with 12 constructs that measure the

following four dimensions: *transactional leadership, transformational leadership, non-*

transactional leadership, and *outcomes of leadership* (Bass & Avolio, 2000). The

transactional leadership dimension is classified through three constructs: C*ontingent*

Reward, Management-by-exception (Active), and *Management-by-exception (Passive)*.

The transformational leadership dimension is classified through five constructs: *Idealized*

Influence (Attributed), Idealized Influence (Behavior), Inspirational Motivation,

Intellectual Stimulation, and *Individual Consideration*. The non-transactional leadership

dimension is classified through the *Laissez-Faire* leadership construct, which measures

absence or avoidance of leadership. The outcomes of leadership dimension are classified

through *Extra Effort, Effectiveness*, and *Satisfaction* constructs. The frequency scale for

the MLQ 5X range from 0 to 4 (0= not at all; 1 = once in a while; 2 = sometimes; 3 =

fairly often; and 4 = frequently, if not always), providing a score average for all the items in the scale, derived by summing the items and dividing by the number of items that make up the scale. The results depict self-perceived leadership style/behavior as a score that indicates how frequently each survey component is used by the respondent (Bass & Avolio, 2000).

The development of the MLQ dates back to 1985 with an initial conceptualization of leadership constructs to measure the constructs of transformational and transactional leadership. These constructs were: *Charisma, Inspirational, Intellectual Stimulation, Individualized Consideration, Contingent Reward, Management-by-Exception,* and *Laissez-Faire*. These leadership constructs emerged from a principal component factor analysis data from 176 military officers (Bass, 1985). However, subsequent research has uncovered several factors that provide the MLQ with the necessary revisions to provide for attributions regarding the leader's transformational style, based on the distinction between idealized charismatic behaviors and attributions (Bass & Avolio, 2000, p. 9). Table 3.1 provides a summary of the MLQ dimensions.

Over the past five years, the MLQ Form 5X has been used in over 200 research programs, doctoral dissertations, and master theses around the world (Bass & Avolio, 2000), and has also been used as an instrument in a variety of settings such as education, business, and the military (Avolio, 1999b). The MLQ 5X was developed based on criticisms about the construct validity of previous revisions (e.g., MLQ Form 5R) (Bass & Avolio, 2000). Avolio examined the factor structure of the MLQ Form 5X with a total

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of 3,786 respondents and 14 different samples, to validate and cross-validate the MLQ

Form 5X as well as reveal generalizabity.

Table 3.1

Multi-Factor Leadership Model Dimensions by Bass and Avolio (2000)

Original Leadership Dimensions	Current Leadership Dimensions
Transformational Factors	**Transformational Factors**
Charismatic/Inspirational Leadership	Idealized Influence (Attributed)
	Idealized Influence (Behavioral)
Intellectual Stimulation	Inspirational Motivation
Individualized Consideration	Intellectual Stimulation
	Individualized Consideration
Transactional Factors	**Transactional Factors**
Contingent Reward	Contingent Reward
Management-by-Exception	Management-by-Exception (Active)
	Management-by-Exception (Passive)
Passive – Avoidant Leadership	Laissez-Faire-Leadership

Findings from three meta-analyses came from 2,873 to 4,242 respondents from

both private and public agencies; which reveal construct validity of the Full Range

Leadership model (Avolio & Bass, 1991). The nine samples (*n*= 2,154) used in the

original CFA analyses revealed that reliabilities ranged from .74 to .94 for both the

leadership factors and scales, which present high reliabilities, and exceed standard cut-

offs for internal consistency recommended in the literature (Bass & Avolio, 2000). The

reliability and validity scores of nine samples (*n*=2,154) and 5 samples (*n*=1,709) used in

the original construct validity analyses (CFAs) provide cross-validation of the MLQ 5X Survey.

The survey items were developed from several sources: (1) series of factor analyses, which provided the best convergent and discriminant validities (Avolio & Bass); (2) partial list squares (PLS) analysis, used to select inclusion in the MLQ 5X; (3) review of the most recent literature to distinguish charismatic from transformational leadership for selection of new items; and (5) recommendations from six scholars in the field of leadership, to modify items on the conceptual model of the full rage of leadership (Avolio & Bass, 1991).

The MLQ 5X has been used with a wide variety of organizations including businesses, schools and universities, and the military (e.g., U.S. Government Research Agency, U.S. Business Firm, U.S. Nursing School, U.S. Political Organization, U.S. Army) (Bass & Avolio, 2000). The replication analysis conducted of these samples demonstrate that the MLQ provides a reliable and valid measure of leadership behavior of both transformational and transactional factors that fit with the purpose of the study, particularly under the dimensions of outcomes of leadership within a self-rated perception of individual experiences.

Acculturation. The Acculturation Rating Scale for Mexican Americans (ARSMA II) developed by Cuéllar et al. (1995) and adapted for the use of Latino/Hispanic Americans was used in this study (See Appendix F). The ARSMA II is an orthogonal and multidimensional scale that uses a 48-item 5 point Likert scaling format evaluating the

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frequency and/or intensity of acculturation measure within three primary factors: language, ethnic identity, and ethnic integration.

ARSMA II measures behavioral aspects of acculturation separated from each culture (Latino/Hispanic and Anglo) and affirmation of ethnicity (e.g., *"I like to identify myself as…" and "I have difficulty accepting…"*) within cultural aspects of practices, customs, ideas, and attributes using two scales (Cuéllar et al., 1995, p.282).

Scale I of the ARSMA II is a 30-item self-rating scale, which provides an assessment of four cultural dimensions: (1) language familiarity, usage, and preference; (2) ethnic identity and generational status; (3) cultural heritage and exposure; and (4) ethnic interactions. ARSMA II Scale I measures acculturation orientation toward the Latino culture and the Anglo culture independently by using two separate subscales: Latino Orientation Scale (LOS) and Anglo Orientation Scale (AOS) (Cuéllar et al., 1980, 1995). The LOS has 17 items and a Coefficient Alpha of .88 while the AOS has a 13 items and a Coefficient Alpha of .83.

Scale II of the ARSMA II is an 18-item self-rating scale used to generate a multidimensional configuration yielding multidimensional aspects of acculturation defined in terms of two axes and four quadrants, as in Cartesian analytic geometry (Cuéllar et al., 1995, p. 283). ARSMA II generates linear acculturation categories (Very Latino Oriented, Latino Oriented to approximately balanced bicultural, Slightly Anglo oriented bicultural, Strongly Anglo Oriented, Very Assimilated; Anglicized) and orthogonal acculturative categories (Traditional, Low Bicultural, High Bicultural, Assimilated). The orthogonal acculturation indices examine the relations of modes of

acculturation to psychological adjustment. Acculturation typologies generated from

orthogonal indices (Traditional, High Integrated Bicultural, Low Integrated Bicultural,

and Assimilated) are derived by using the LOS and AOS scales (Cuéllar et al., 1995).

Reliabity data show that ARSMA II scales and subscales are stable. Table 3.2 provides a

summary of the reliability of the ARSMA

Table 3.2

Reliability Data

N	Anglo Orientation	Latino Orientation	Marginality Orientation	Anglo Marginality Orientation	Latino Marginally Orientation	Latino/ Hispanic American Marginality Orientation
Split-half	.77	.84	.82	.87	.60	.90
Coefficient Alpha	.83	.88	.87	.90	.68	.91
Test-retest N= 31	.94	.96	.78	.72	.80	.81

A pearson product moment correlation of .61 (p<.001) between acculturation and

generational status reveals a statistical significance, F (4,346) = 54.195, p<.001,

supporting construct validity of the ARSMA II. Factors analysis on ARSMA II scales and

subscales indicate the following: (1) Age/gender and acculturation are found to be

nonsignificant; and (2) Socioeconomic status/education and acculturation are positively

correlated with acculturation (r=22, p<. 001) (Cuéllar et al., 1995).

ARSMA II employs a bilingual format (English and Spanish). However, for the

purpose of this study, I used the English version of the ARSMA II, since the participants

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were expected to use the English language as part of the communication processes in the U.S. Army.

ARSMA II was chosen for five reasons: (1) it provides a bidimensional acculturation scale reflecting two cultural orientations independently of each other (Latino/Hispanic or non-Latino/Hispanic); (2) it allows categorization of respondents into 4 levels of acculturation (Traditional Latino/Hispanic (adapted), integrated, marginal, separation, assimilated, and unable to classify) based on their scores on the 2 independent dimensions (Anglo and Latino/Hispanic); (3) it adds variability to the measurement of acculturation, and allows for more sophisticated treatment of the data (canonical correlation analyses); (4) it has high reliability score: an internal consistency of (.81) and (-.88); test-retest (.72) and (- .80); and inter-rater reliability of (.89); high validity measure with ratings of acculturation ($r = .83$), and five-point Likert-type format; and (5) it measures differences among individuals' acculturation in terms of SES/education and generational status, and age/gender (Mendoza & Martínez, 1981). While other acculturation scales measure aspects of language, social activities, and ethnic foods, which tend to crossover on issues of diversity that may apply to all ethnic groups regardless of their race and country of origin; the ARSMA II was more specific to acculturation orientations.

According to Cuéllar et al. (1995), the ARSMA II scale shows good psychometric characteristics that reveal generalizability of the instrument and its usefulness in comparative or cross-cultural studies (p. 283). The measurement of acculturation is important not only as a way to assess individual identification or personality differences,

but also to gauge changes of behavior and values by individuals exposed to mainstream cultural patterns of the United States and their values, norms, attitudes, and behaviors (Marín, Sabogal, VanOss Marín, Otero-Sabogal, & Pérez-Stable, 1987). Several acculturation scales have been developed with limitations, created for a specific cross-cultural value as aspects of diversity. However, the ARSMA II scale provides a 4-level acculturation scale, which allows an acculturation scale that is applicable to all Hispanic sub-groups: (1) Very Latino/Hispanic oriented, (2) Latino/Hispanic oriented to approximately balanced bicultural, (3) Slightly Anglo oriented bicultural, (4) Strongly Anglo oriented, and (5) Very assimilated – Anglicized (Cuéllar et al., p. 285). Detailed technical information of the ARSMA II scale is presented in Chapter II.

Individualism-Collectivism (I-C). The Horizontal and Vertical Individualism and Collectivism Scale developed by Triandis and Gelfand (1998) were used in this study (Appendix G). This scale was used to measure individualism and collectivism dimensions as perceived by the individual. The I-C measures four dimensions: (1) Horizontal Individualism (HI), (2) Vertical Individualism (VI), (3) Horizontal Collectivism (HC), and (4) Vertical Collectivism (VC), which were used to measure I-C based on the following seven constructs: Competition, emotional distance from in-groups, family integrity, hedonism, interdependence, self-reliance, and sociability (p.123).

The I-C was developed initially to measure individualism and collectivism; and has been revised several times since 1995 by Singelis, Triandis, Bhawuk, and Gelfand. The most recent revision is the I-C scale (Triandis & Gelfand, 1998), which is used to measure horizontal and vertical dimensions of individualism and collectivism; and was

used in this study. This survey was chosen for three fundamental reasons: (1) it assesses individualism and collectivism within horizontal and vertical constructs; (2) it has not been used on Latino/Hispanic women in the military; and (3) it is uncomplicated for both the respondent and the researcher. Specifically, the I-C scale is useful for this study because it offers Latino women respondents the opportunity to address Latino cultural factors of individualism and collectivism (Acosta-Belén, 1979; Arredondo, 1991; Bordas, 2001; De Anda, 1984; Gracia, 2000).

The I-C scale (1998) consists of 27 items with 5 Likert-Like that measure dimensions of individualism and collectivism constructs. The utility of its constructs offer participants a way to reflect upon their own values in terms of individualism and collectivism (e.g., *"I rather depend on myself than others," "Winning is everything," "It is important to me to maintain harmony in my group," "Family members should stick together, no matter what sacrifices are required"*) (Triandis & Gelfand, 1998). Via these questions, the scale defines attributes of individualism and collectivism through the respondent's: (a) definition of self, (b) personal goals, (c) relationship with others, and (d) social behavior (Triandis & Gelfand). The I-C scale is based on the four-way typology that fits with the individualism-collectivism literature within cultural patterns such as: communal sharing, authority ranking, equality matching, and systems of individualism (Fiske, 1992).

The I-C scale's reliability and validity depicts a relationship between the proposed dimensions of HI and VI and between VI and VC typologies (Triandis, 1996). The validity of these constructs, Singelis et al. (1995) provided 32 items, 8 for each of HI

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(α =.67), VI (α = .74), HC (α = .74), and VC (α=.68). Reliability and validity of the I-C

scale show that the instrument uses multi-trait and multi-method analysis with a

correlation analysis among horizontal and vertical scales that show high validity

(Triandis & Gelfand, 1998) on 27 items, HI (α = .81), VI (α = .82), HC (α = .80), and VC

(α = .73) (p. 124).

Demographic. The demographic questionnaire was used to report data concerning

age, sex, ethnicity/race, education, organization, years in service, rank, MOS/Branch, and

type of leadership position (Appendix H). Specifically, the survey collected demographic,

leadership, acculturation and individualism/collectivism data that provided information

on selected variables of leadership and acculturation as a snapshot at one point in time.

The survey was selected as the research tool for this study because they provide a broadly

based response to a specific set of questions. Using this survey, I compared the results of

the participants.

Confidentiality and Ethical Issues

Mailed surveys do not require a consent form. Rather, they require an information

sheet regarding the survey (See Appendix C and D). Returning the survey is considered

to imply consent; thus the survey is voluntary (Bickman & Rog, 1998). The study did not

foresee any risk in the respondents volunteering information because participants'

information was to remain confidential. Further, participants' personal information was

not and will not be available to their superiors.

Data Analysis

A detailed discussion of the data analysis procedure is presented here. At this stage, the data analysis procedure was conducted through survey measures, such as standardized scales and indexes. Responses were used to cross-tabulate data, and then analyzed using a quantitative computer program called Statistical Package for Social Science (SPSS).

Statistical analysis of the data was performed using the following methods: (1) descriptive analyses to describe the sample; (2) frequency distributions to show the numbers and percentages of people or items that fall into categories; (3) median and mean to measure any central tendency; (4) standard deviation to see the extent of the data lumped or spread out around the mean; (5) factor analysis to determine if the scales for the MLQ, ARSMA II, and I-C scales hold up for the study's sample; and (6) canonical correlation analysis to examine the relationship between sets of variables, such as the relationship between ARSMA II, MLQ, and I-C scales. Specifically, canonical correlation was used to analyze the relationship between leadership and acculturation by measuring statistical analysis between these variables in relation to each other, and to individualism/collectivism. This type of correlation analysis allowed the researcher to explore how the two sets of variables relate to each other (Tabachnick & Fidell, 1989).

Canonical analysis is a multivariate technique, using a linear combination of variables; one combination on the IV and one combination on the DV side to form a pair of canonical variates. For example, a pair associated with leadership and a pair associated

with acculturation; and a pair associated with leadership and I-C; and a pair associated with acculturation; and a pair associated with I-C, were used to correlate results.

I used canonical correlation because this type of analysis supports a relational study between leadership, acculturation, and individualism/collectivism constructs. Through both logical and computational correlation analysis between the variables, validity and reliability of the study were obtained. Specifically, validity and reliability were achieved by direct test of multi-collinearity and singularity of the variables, which shed information about the relationship between leadership, acculturation, and individualism-collectivism.

Chapter IV: Results

Introduction of the Results

The purpose of this study was to examine the relationship of self-perceived leadership, acculturation, and individualistic/collectivistic attitudes in a sample of Latinas in the United States Army. The research aimed at investigating how acculturation and individualistic/collectivistic attitudes relate to leadership by examining the relationship between leaders' self-perceived leadership behavior (e.g., knowledge, skills, and attitudes) and level of acculturation, along with individualism/ collectivism dimensions.

In this chapter, the results of the statistical analysis are presented. In order to provide a comprehensible summary of the statistical results, the following sections address: (a) description of the sample; (b) Latino women's self-perceptions of their leadership style data; (c) relationship of acculturation and leadership data; (d) relationship of individualism/collectivism to self-perceived leadership style data; (e) canonical correlation results; and (f) additional analyses results.

Description of the Sample

The final sample consisted of 375 responses to a survey mailed to 524 U.S. Army female officers (Second Lieutenant through Colonel) of Latino/Hispanic background. This sample represents a return rate of 72 percent. The sample represents 58 percent of the 650 total population of U.S. Army Hispanic/Latina female officers serving on active duty. Participants were of both of non-deployed and deployed status (i.e., military overseas mission). Although census data that established non-deployability was used, some of these officers nevertheless were deployed, but still wished to participate. Deployed officers faced challenges of responding in a timely manner but accessed fax or e-mail to submit their completed surveys. Others were strictly dependent on the U.S. Army postal service. After the deadline for survey submission, I received six completed surveys from officers who were deployed; these surveys were not used for the analysis.

The sample was heterogeneous in terms of the participants' rank and prior service, military branch, unit and leadership positions, age and place of birth, marital status, number of children, racial background, cultural sub-ethnic group, education, military education, and generational status. Sample bias, missing data, sample reliability analysis is discussed in this section.

Rank and Prior Service

There were 48 (12.9%) Second Lieutenants, 66 (17.7%) First Lieutenants, 135 (36.2%) Captains, 66 (17.7%) Majors, 44 (11.8%) Lieutenant Colonels, and 13 (3.5%) Colonels (See Figure 4.1). However, 3 officers left this item blank. Of 375 female U.S. Army officers with prior service, 127 (33.9%) were enlisted and 25 (6.7%) were officers. About 7 officers (1.9 %) had prior service as both enlisted and officers ranks, and 198 (52.8%) had no prior service. However, about 12 (3.2%) officers left this item blank. The participant's total years in service ranged from less than one to 30, with an average of eight (SD 7.00) years in service.

Regarding prior service by branch, data show that 125 (34.2%) of officers were in the Army (Active), while 25 (6.8%) were in the Reserve or National Guard. As to other officers with prior service, data show that 4 (1.1) were Air Force, 1(.3) Marines, 4 (1.1) Navy, and 1(.3) Combination of Service Components.

Figure 4.1

Distribution of the Sample of Latina Officers by Rank: 2004
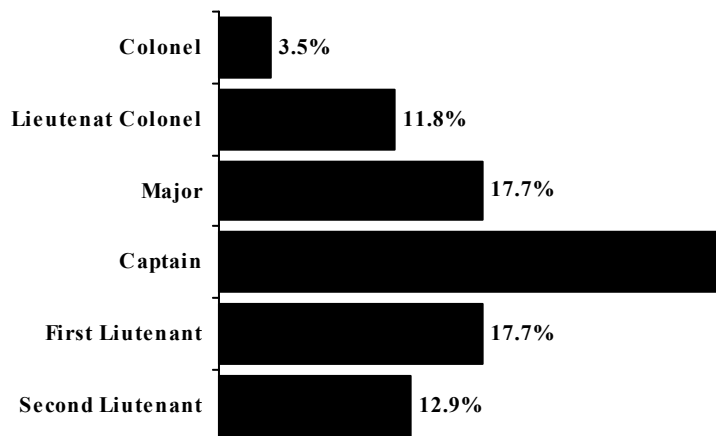
Military Branch, Units and Leadership Positions

The top six military branches represented were Army Nurse Corps (12.5%), Adjutant General Corps (6.8%), Signal Corps (6.4%), Medical Service Corps (6.2%), Military Intelligence Corps (6.2%), and Engineering Corps (5%). These officers held various leadership positions within their commands (See Figure 4.2). Unit/Leadership positions ranged from administrative to leadership positions (i.e., Platoon leader, Commander, head/staff nurse) in different levels of units across the United States (CONUS) and overseas (OCONUS).

Figure 4.2

Percentage Distribution of the Sample of Latina Officers by Branch: 2004
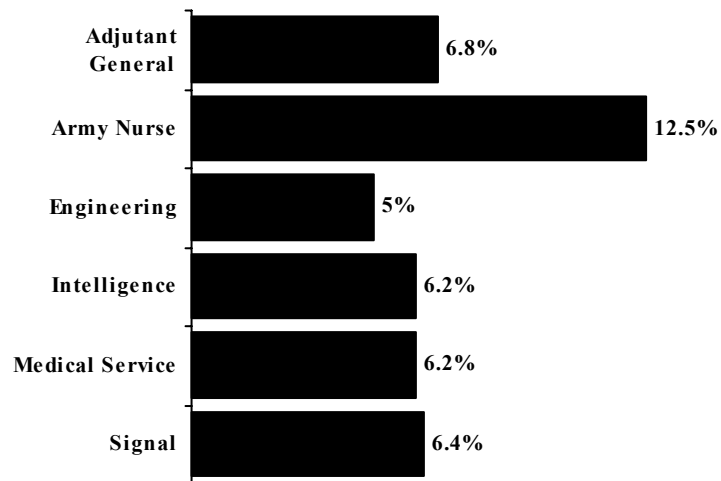
Age and Place of Birth

The participants' ages ranged between 23 and 58, with an average age of 32 (SD 8). The top six locations of birth were: Puerto Rico (15.5%), Texas (12.3%), New York (8%), California (7.7%), Mexico/Panama (2.7%), and Germany (2.5%).

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Marital Status

The participants' marital status was varied. The composition was 100 (27.5%) single/ever married, 10 (2.7%) single, engaged to be married, 194 (53.3%) married, 10 (2.7%) separated; and 50 (13.7%) divorced (See Figure 4.3). However, 11 officers left this question blank.

Figure 4.3

Percentage Distribution of the Sample of Latina Officers by Branch: 2004
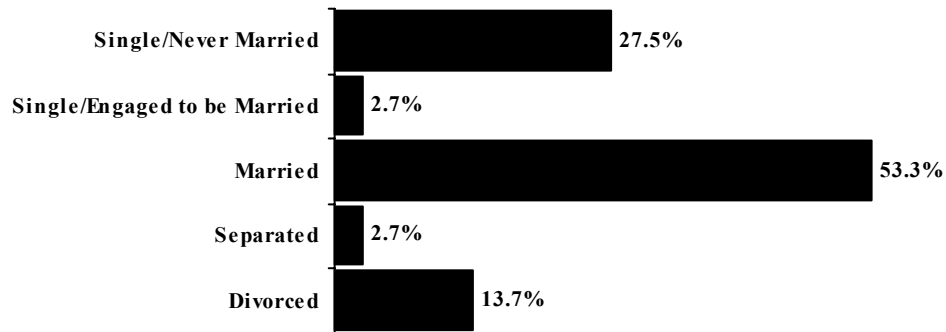
Number of Children

The participant's number of children ranged between zero and 4 or more, with an average of zero children (SD 1.10). The breakdown was as follows: 184 (50.3%) zero, 78 (21.3%) one, 65 (17.8%) two, 31 (8.5%) three, 8 (2.2%) four or more (See Figure 4.4). However, 9 officers left this question blank.

Figure 4.4

Distribution of the Sample of Latina Officers by Number of Children: 2004

Number of Children	Percentage
None	50.3%
1	21.3%
2	17.8%
3	8.5%
4 or more	2.2%
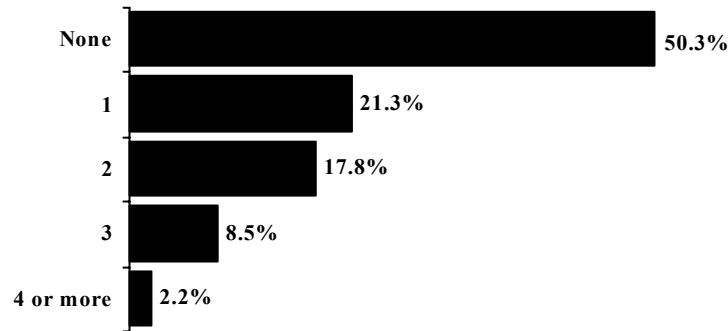
Racial Background

The participants' predominant racial background was Other (SD 1.52) (i.e., American, Hispanic/Latino, Hispanic American, combination or mixture of races/cultures throughout the world). The racial composition of all participants was 7 (2%) African-American/Black, 7 (2%) American Indian or Alaskan Native, 102 (28.7%) Anglo/White, 1 (0.3%) Asian; and 239 (67.1%) other race(s) (See Figure 4.5). However, 19 officers left this question blank.

Figure 4.5

Percentage Distribution of the Sample of Latina Officers by Racial Background:

2004
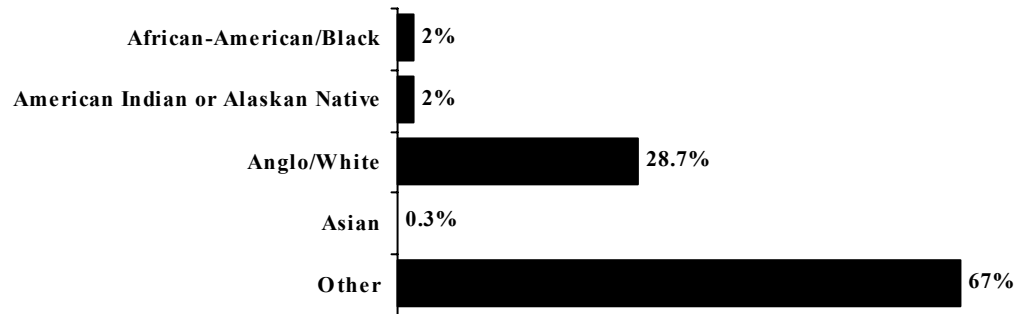
Cultural Sub-Ethnic Group

The participants' six predominant cultural sub-ethnic groups were Puerto

Rican, Mexican, Other (i.e., mixture or combination of cultures), Spanish,

Colombian, and Panamanian. The cultural sub-ethnic group composition of all

participants was Argentina 1 (0.3%), Bolivia 1 (0.3%), Colombia 12 (3.3%), Cuba 4

(1.1%), Dominican Republic 7 (1.9%), Ecuador 6 (1.6%), El Salvador 6 (1.6%),

Guatemala 2 (0.5%), Honduras 1 (0.3%), Mexico 106 (29%), Panama 10 (2.7%),

Paraguay 1 (0.3%), Peru 3 (0.8%), Puerto Rico 114 (31.2%), Spain 16 (4.4%), and

Other 75 (20.7%) cultural sub-ethic group(s) (i.e., mixed cultures) officers (See

Figure 4.6). Ten officers left this item blank.

Figure 4.6

Percentage Distribution of the Sample of Latina Officers by Cultural Sub-Ethnic

Group: 2004

Group	Percentage
Argentina	0.3%
Bolivia	0.3%
Colombia	3.3%
Cuba	1.1%
Dominican Republic	1.9%
Ecuador	1.6%
El Salvador	1.6%
Guatemala	0.5%
Honduras	0.3%
Mexico	29%
Panama	2.7%
Paraguay	0.3%
Peru	0.8%
Puerto Rico	31.2%
Spain	4.4%
Other	20.7%

The data show that no officers indicated Chile, Costa Rica, Nicaragua, Uruguay, and Venezuela as a response to their cultural sub-ethnic group. However, the data show that officers from both Belize and Brazil consider themselves as part of the cultural sub-ethnic group of Latino/Hispanic heritage.

Education

The highest level of education composition of all participants was 4 (1.1%) some college, 170 (46.7%) bachelor's degree, 41(11.3%) some graduate school credits, 112 (30.8%) master's degree or equivalent; and 37 (10.2%) doctorate or professional degree (e.g., MD, DDS, Ph.D., JD) (See Figure 4.7). Participants' average highest education composition was some graduate school credits (SD1.11).However, 11 officers left this item blank.

Figure 4.7

Percentage Distribution of the Sample of Latina Officers by Highest Education: 2004
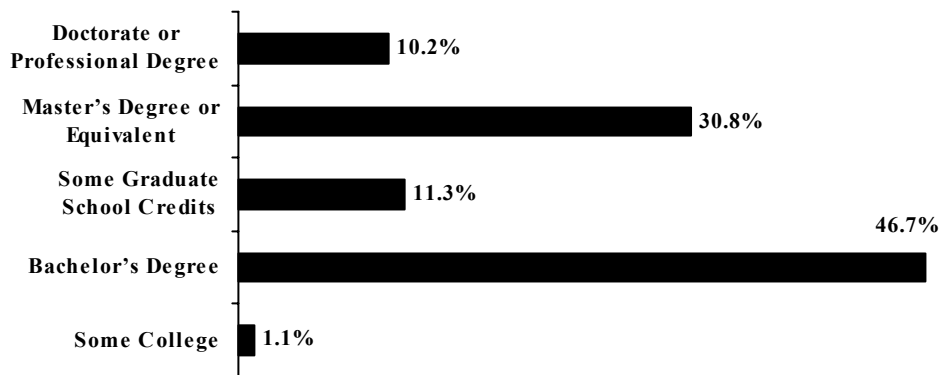
Data show a range of education types from Science to Arts, specifically business, communications, engineering, law, medicine, political science, psychology, and sociology.

Military Education

The highest military education of all participants was the Advanced Officer
Course (SD 1.36). The highest military education composition was 6 (1.6%) ROTC; 3
(.8%) Military *Academy*; 146 (40%) Basic Officer Course, 33 (9%) Advanced Officer
Course, 96 (26.3%) Combined Arms School 3, 70 (19.2%) Command General Staff
College; 8 (2.2%) War College, and 3 (0.8%) Other (i.e., National Defense and
International Law) (See figure 4.8). However, 10 officers left this item blank.

Figure 4.8

Percentage Distribution of the Sample of Latina Officers by Highest Military
Education: 2004
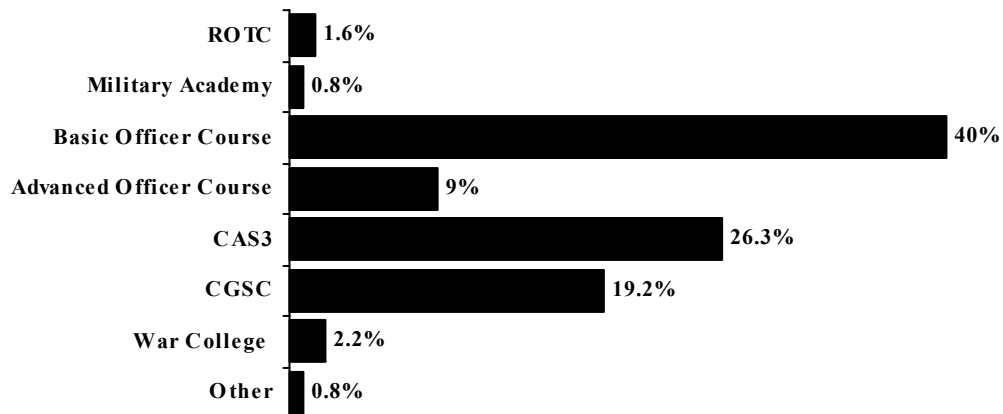
Generational Status

The average generational status all participants was 2nd generation (SD 1.27). The data show 123 (33.9%) 1st generation; 118 (32.5%) 2nd generation; 33 (9.1%) 3rd generation; 68 (18.7%) 4th generation; and 21 (5.8%) 5th generation officers (See Figure 4.9). However, 12 officers left this item blank.

Figure 4.9

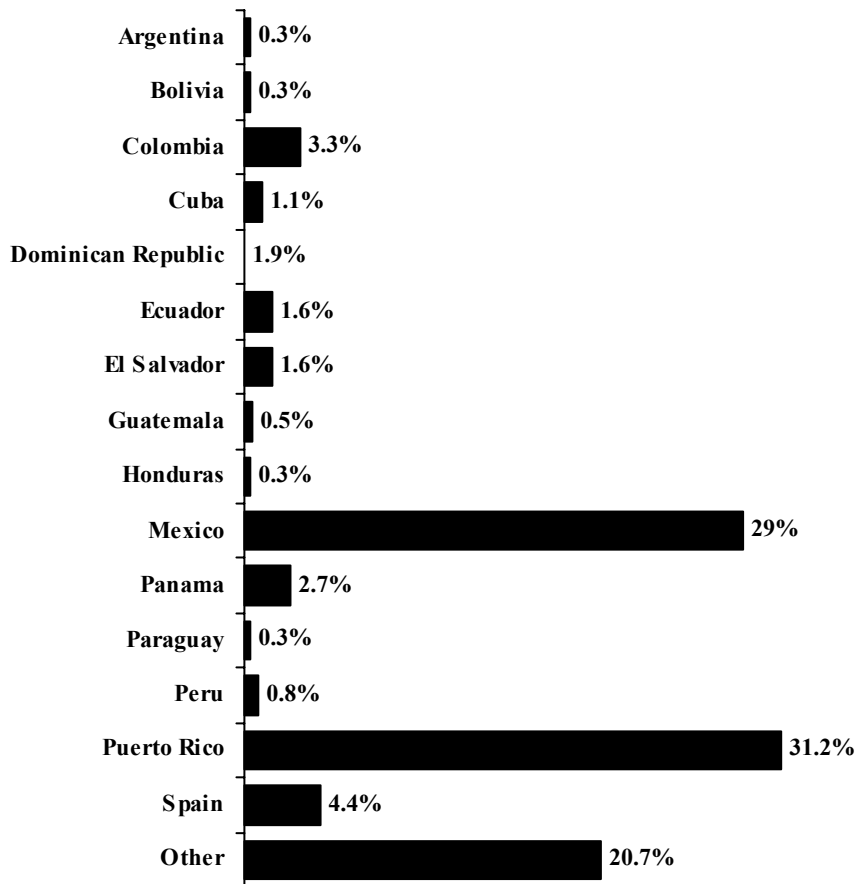*Percentage Distribution of the Sample of Latina Officers by Generational Status: 2004*
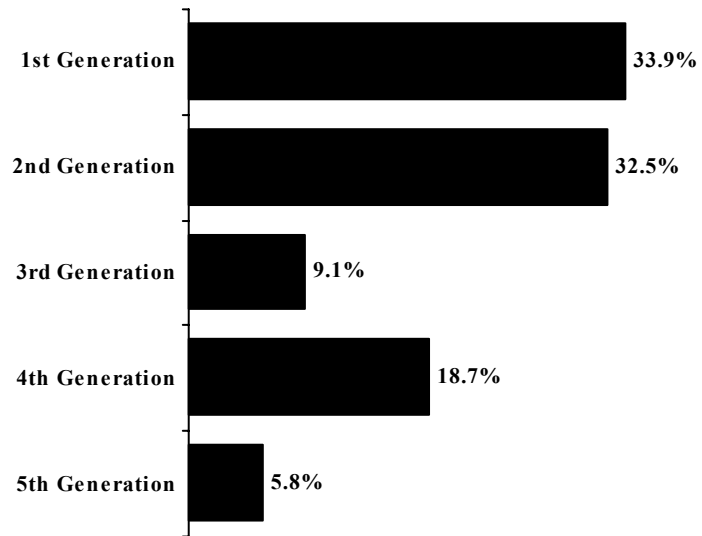
Sample Bias

One way of checking sampling bias is to see how the variables examined correlated with the response time of the participants. A correlation analysis was conducted to see how the samples' responses varied with time elapsed. Time elapsed was defined as the difference in time between when the survey was sent to when it was returned.

The data show that there were two correlations that were significant; Latino Marginality (-.12) and Latino American/Hispanic American Marginality (-.13), at the p<.05 level. These results indicate that respondents who feel marginal acculturation, both marginalized Latino American/Hispanic American acculturation and marginalized Latino Acculturation, returned the survey more quickly than those who were less marginalized. Given the large number of correlations examined, it is possible that these two significant findings were due to chance. In addition, the magnitude of these two relationships was small. This suggests that response time did not present an issue of sampling bias.

Missing Data

Occasionally, officers did not provide an answer to a specific question from one of the scales. When this occurred, the missing item was replaced by the mean of the items for the particular scale for the individual officer.

Sample Reliability Analysis

Coefficient alphas were calculated to examine reliability for each instrument (MLQ 5X Leader Form, ARSMA II, and IC). In general, the result of the reliability analysis demonstrated that the instruments were sufficiently reliable to examine the questions posed in this study.

Multi-Factor Leadership Questionnaire. The MLQ 5X Leader Form reliability analysis showed the following: (1) Idealized Influence (Attributed) or IIA (questions 10, 18, 21, 25) obtained a coefficient alpha = .54; (2) Idealized Influence (Behavior) or IIB (questions 6, 14, 23, 34) obtained coefficient alpha = .57; (3) Inspirational Motivation or IM (questions 9, 13, 26, 36) obtained a coefficient alpha = .67; (4) Intellectual Stimulation or IS (questions 2, 8, 30, 32) obtained a coefficient alpha = .50; (5) Individual Consideration or IC (questions 15,19, 29, 31) obtained a coefficient alpha =.58; (6) Contingent Reward or CR (questions 1, 11, 16, 35) obtained a coefficient alpha = .40; (7) Management by Exception (Active) or MEA (questions 4, 22, 24, 27) obtained a coefficient alpha = .70; (8) Management by Exception (Passive) or MEP (questions 3, 12, 17, 20) obtained a coefficient alpha = .53; (9) Laissez-faire Leadership or LF (questions 5, 7, 28, 33) obtained a coefficient alpha = .52; (10) Extra-effort or EE (questions 39, 42, 44) obtained a coefficient alpha = .71; (11) Effectiveness or E (questions 37, 40, 43, 45) obtained a coefficient alpha = .72; and (12) Satisfaction or S (questions 38, 41) obtained a coefficient alpha = .50

In general, the coefficient alpha's for the MLQ 5X scales were lower for Latina officers than the coefficient alpha's for the U.S. normative sample. The MLQ

5X scales were used despite these lower coefficient alphas in the Latina officer sample.

If different scales were constructed it would be impossible to compare the results of

the study to other studies using the MLQ 5X forms (leader – self-rated).

The coefficient alphas were determined to be adequate for the purpose of the study.

This is reasonable because while coefficient alphas on the Latina sample were lower,

they still are adequate to use in research (Avolio & Bass, 1991; Lowe, Kroeck, &

Sivasubramaniam, 1996).

Further, since the coefficient alphas were lower than the normative, the data

suggest that there is an inconsistency across leadership styles in both samples. The

data further suggest that Latino officers may perceived their leadership style in a

somewhat different manner than leaders from the U.S. (normative) sample (Avolio &

Bass, 2004).

Acculturation Scale I and II (ARSMA). The acculturation scale I reliability

analysis showed the following: (1) Anglo Orientation Scale (questions 2, 4, 7, 9, 10,

13, 15, 16, 19, 23, 25, 27, 30) obtained a coefficient alpha = .69 ; and (2) Latino

Oriented Scale (questions 1, 3, 5, 6, 8, 11, 12, 14, 17, 18, 20, 21, 22, 24, 26, 28, 29)

obtained a coefficient alpha = .89

The acculturation scale II reliability analysis showed the following: (3) Anglo

Marginality (questions 31-36) obtained a coefficient alpha = .92; (4) Latino

Marginality (questions 37-42) obtained a coefficient alpha = .87; and (5) Latino

American/Hispanic American Marginality (questions 43-48) obtained a coefficient

alpha = .91

The coefficient alphas for the acculturation scales were of similar magnitude to those samples of other studies (Cuéllar, 2000; Cuéllar et al., 1995; Cuéllar & González, 2000; Cuéllar et al., 1980) and adequate for the purposes of this research study.

Individualism and Collectivism Scale. The individualism/collectivism reliability analysis showed the following: (1) Horizontal Individualism or HI (questions 1, 5, 9, 13, 27) obtained a coefficient alpha = .62; (2) Vertical Individualism or VI (questions 3, 7, 11, 15, 17, 20, 22, 24) obtained a coefficient alpha = .74; (3) Horizontal Collectivism or HC (questions 2, 6, 10, 14, 18, 21, 25, 26) obtained a coefficient alpha = .70; and (4) Vertical Collectivism or VC (questions 4, 8, 12, 16, 19, 23) obtained a coefficient alpha = .63

The coefficient alphas for the individualism/collectivism scales were of similar magnitude to those samples of other studies (Singelis et al., 1995; Triandis & Gelfand, 1998) and adequate for the purposes of this research study.

Latino Women's Self-perceptions of their Leadership Style Data

This section presents the results of the statistical analyses for the first research question, which poses: *What are Latino women's self-perceptions of their leadership style?* I looked at the patterns of means for the sample in comparison to other samples with a spearman's rank order coefficient. MLQ 5X (Level 0) 2004 normative sample coefficient correlated to the Latina sample showed a spearman's rho correlation coefficient significantly related to US (.92**), South Africa (.88**), Oceania (.85**), Europe (.69*), but not significantly related to Singapore (.467) normative samples (See Table 4.1).

Additionally, the Latina sample was most comparable to the U.S. sample (Avolio & Bass, 2004). The resulting coefficient was .92, which indicates that the rank order pattern of means were virtually identical between the U.S. sample and the sample of Latina officer.

Table 4.1

Descriptive Statistics for MLQ 5X 2004 Normative Sample

Latinas in the U.S. Army (Level=0, N=375)			U.S. (Level=0, N=3375)			South Africa (Level=0, N=1143)			Oceania (Level=0, N=1112)			Europe (Level=0, N=1143)			Singapore (Level=0, N=495)		
Scale	Mean	SD	Scale	Mean	SD	Scale	Mean	SD	Scale	Mean	SD	Scale	Mean	SD	Scale	Mean	SD
II(A)	3.16	.56	II(A)	2.95	.53	II(A)	2.97	.60	II(A)	2.86	.54	II(A)	2.83	.55	II(A)	2.47	.91
II(B)	3.26	.52	II(B)	2.99	.59	II(B)	2.99	.59	II(B)	3.05	.61	II(B)	3.00	.55	II(B)	2.48	.77
IM	3.25	.55	IM	3.04	.59	IM	3.04	.60	IM	3.07	.59	IM	3.00	.60	IM	2.46	.83
IS	3.11	.52	IS	2.96	.52	IS	2.97	.55	IS	3.08	.51	IS	3.02	.48	IS	2.31	.77
IC	3.31	.54	IC	3.16	.52	IC	3.09	.57	IC	3.20	.49	IC	3.10	.50	IC	2.34	.89
CR	3.15	.56	CR	2.99	.53	CR	3.03	.59	CR	2.90	.54	CR	3.02	.52	CR	2.45	.83
MEA	1.97	.82	MEA	1.58	.79	MEA	2.31	.85	MEA	1.69	.83	MEA	2.20	.79	MEA	2.50	.80
MEP	.92	.61	MEP	1.07	.62	MEP	1.09	.68	MEP	1.08	.63	MEP	.96	.60	MEP	1.22	.75
LF	.41	.47	LF	.61	.52	LF	.67	.66	LF	.70	.57	LF	.62	.51	LF	.93	.89
EE	3.15	.63	EE	2.79	.61	EE	2.90	.65	EE	2.68	.61	EE	2.85	.50	EE	n/a	n/a
EFF	3.39	.49	EFF	3.14	.51	EFF	3.12	.54	EFF	3.12	.50	EFF	3.06	.57	EFF	n/a	n/a
SAT	3.33	.55	SAT	3.09	.55	SAT	3.17	.59	SAT	3.12	.53	SAT	2.96	.50	SAT	n/a	n/a

Note: <u>Transformational leadership behaviors</u>: II (A) - Idealized (Attributed), II (B) - Idealized (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC - Individual Consideration. <u>Transactional leadership behaviors</u>: CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and FF - Laissez-Faire Leadership. <u>Leadership outcomes</u>: EE – Extra effort, EFF – Effectiveness, and SAT – Satisfaction

Table 4.2 provides the T-scores comparing the means from the sample of Latina Officers with the U.S. normative means. The T-test analysis showed that the samples were significantly different on each dimension of leadership. These significant differences are likely due to the large sample size. In order to determine the magnitude of these significant differences, the mean differences were compared to the standard deviations of the normative sample. For every leadership dimension except *Extra Effort* the mean differences were less than one half of the standard deviation of the normative sample. For Extra Effort, the mean difference was less than one standardization of the normative sample. This finding suggests that whereas the differences in leadership between the Latina Officer sample and the normative sample are significant, they are small and probably trivial.

Table 4.2

T-Test Score Comparison with U.S. Normative and Latina Officers MLQ Samples

| Scale | U.S. (Level=0, N=3375) | | Latinas in the U.S. Army (Level=0, N=375) | T-test | |
	Mean	SD	Mean	MD	T
II(A)	2.95	.53	3.16	.22	7.42*
II(B)	2.99	.59	3.26	.27	9.94*
IM	3.04	.59	3.25	.21	7.36*
IS	2.96	.52	3.11	.15	5.55*
IC	3.16	.52	3.31	.15	5.47*
CR	2.99	.53	3.15	.16	5.63*
MEA	1.58	.79	1.97	.39	9.22*
MEP	1.07	.62	.92	-.14	-4.45*
LF	.61	.52	.41	-.19	-7.83*
EE	2.79	.61	3.15	.36	10.88*
EFF	3.14	.51	3.39	.25	9.79*
SAT	3.09	.55	3.33	.25	8.55*

Note: <u>Transformational leadership behaviors</u>: II (A) - Idealized (Attributed), II (B) - Idealized (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC - Individual Consideration. <u>Transactional leadership behaviors</u>: CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and FF - Laissez-Faire Leadership. <u>Leadership outcomes</u>: EE – Extra effort, EFF – Effectiveness, and SAT – Satisfaction.

Table 4.3 shows the inter-correlations among MLQ factor scores of U.S. normative sample. Inter-correlations among MLQ factor scores of both U.S. normative and Latinas in the Army samples were analyzed. The data on the inter-correlations among MLQ factor scores of Latinas in the U.S. Army normative sample are shown on Table 4.4.

Table 4.3

Normative U.S. Sample (Level=0): Inter-correlations among MLQ Factor Scores

	II(A)	II(B)	IM	IS	IC	CR	MEA	MEP	LF	EE	EFF	SAT
II(A)	(.70)											
II(B)	.49**	(.64)										
IM	.54**	.58*	(.76)									
IS	.39**	.44**	.43**	(.64)								
IC	.46**	.42**	.41**	.45**	(.62)							
CR	.45**	.43**	.45**	.38**	.44**	(.60)						
MEA	-.01	.01	-.08**	.02	-.13**	.06**	(.75)					
MEP	-.16**	-.13**	-.19**	-.17**	-.16**	-.13**	.11**	(.64)				
LF	-.25**	-.17**	-.25**	-.15**	-.20**	-.24**	.07**	.46**	(.60)			
EE	.55**	.46**	.56**	.45**	.47**	.45**	-.02	-.22**	-.24**	(.79)		
EFF	.53**	.37**	.50**	.37**	.44**	.47**	-.05**	-.25**	-.38**	.56**	(.67)	
SAT	.52**	.35**	.43**	.36**	.46**	.39**	-.07**	-.20**	-.27**	.53**	.60**	(.78)

SOURCE: Technical report, MLQ, Mindgarden, 2004. Note: <u>Transformational leadership behaviors</u>: II (A) - Idealized (Attributed), II (B) - Idealized (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC - Individual Consideration. <u>Transactional leadership behaviors</u>: CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and FF - Laissez-Faire Leadership. <u>Leadership outcomes</u>: EE – Extra effort, EFF – Effectiveness, and SAT – Satisfaction. [a] N = 3,755 Numbers in parentheses are reliability scores. * $p < .05$; ** $p < .01$

Table 4.4

Latina Officers in the U.S. Army - Active Duty, Level=0: Inter-correlations among MLQ Factor Scores

	II(A)	II(B)	IM	IS	IC	CR	MEA	MEP	LF	EE	EFF	SAT
II(A)	(.54)											
II(B)	.49**	(.57)										
IM	.51**	.55**	(.67)									
IS	.35**	.48**	.46**	(.50)								
IC	.42**	.47**	.45**	.48**	(.58)							
CR	.49**	.45**	.44*	.45**	.43**	(.40)						
MEA	.18**	.17**	.13**	.27**	.40	.18**	(.70)					
MEP	.02	-.09	-.18**	-.04	-.10	.07	.09	(.53)				
LF	-.20**	-.23**	-.26**	-.11*	-.15**	-.13*	.09	.44**	(.52)			
EE	.49**	.53**	.58**	.44**	.46**	.42**	.07	-.18**	-.31**	(.71)		
EFF	.44**	.47**	.54**	.44**	.45**	.44**	.07	-.18**	-.32**	.61**	(.72)	
SAT	.47**	.45**	.51**	.41**	.51**	.46**	.12*	-.11*	-.26**	.63**	.62**	(.50)

Note: <u>Transformational leadership behaviors</u>: II (A) - Idealized (Attributed), II (B) - Idealized (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC - Individual Consideration. <u>Transactional leadership behaviors</u>: CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and FF - Laissez-Faire Leadership. <u>Leadership outcomes</u>: EE – Extra effort, EFF – Effectiveness, and SAT – Satisfaction. * p < .05 ** p < .01

A cell by cell comparison of the correlations among leadership dimensions in the normative sample and the Latina Officer sample shows that the patterns of relationships are almost identical in the two samples. For example, II (A) and II (B) correlate with each other at r = .49 in both samples. The one important exception to the pattern of similar correlations in the two samples involves the MEA and MEP scales. In the normative sample MEA is either uncorrelated or negatively correlated with the transformational leadership scales (5I's). In the Latina Officer sample the MEA scale correlates positively with the transformational leadership scales (5I's). In the normative sample MEP correlates negatively with the transformational leadership scales (5I's). In the Latina Officer sample MEP is uncorrelated with the transformational leadership scales (5I's), except the significant negative correlation between MEP and IM. Discussion of the self-perceived leadership style data are presented in Chapter V.

Relationship of Acculturation and Leadership Data

The following section provides the results of the statistical analyses for the second research question: *How does acculturation relate to leadership? Specifically, what is the relationship between acculturation and Latino women's self-perceptions of their leadership style?*

Results of correlations analysis between MLQ and ARSMA factor scores show a significant relationship between the two sets of variables. In order to provide a clear view of the results, I have divided the findings by ARSMA scales/orientation (see Table 4.5):

Anglo Orientation shows four significant correlations between acculturation and leadership. Leadership behavior for this scale show significant correlation in two transformational leadership behaviors, one transactional leadership behavior, and one leadership outcome. The transformational leadership behaviors were: *Idealized Influence (Attributed)* and *Idealized Influence (Behavior)*. The transactional leadership behavior was *Contingent Reward*. The leadership outcome was *Effectiveness*.

Latino Orientation shows ten significant correlations between acculturation and leadership. Leadership behaviors for this scale show significant correlation in four transformational and four transactional leadership behaviors, and two leadership outcomes. The Transformational leadership behaviors were: *Idealized Influence (Behavior), Inspirational Motivation, Intellectual Stimulation,* and *Individualized*

Consideration. The transactional leadership behaviors were: *Contingent Reward, Management-by-Exception (Active),* and *Management-by-Exception (Passive)*. The leadership outcomes were *Extra Effort* and *Effectiveness*.

Anglo Marginality shows four significant correlations between acculturation and leadership. Leadership behaviors for this scale show a significant relationship in one transformational, three transactional leadership behaviors but no outcomes. The transformational leadership behavior was *Intellectual Stimulation*. The transactional leadership behaviors were *Management-by-Exception (Active), Management-by-Exception (Passive)*, and *Laissez-Faire Leadership*.

Latino Marginality and *Latino American/Hispanic American Marginality* show two significant correlations between acculturation and leadership. Leadership behaviors for both of these scales show a relationship of transactional leadership in *Management-by-Exception (Passive)* and *Laissez-Faire Leadership*, but no significant relation in outcome factors.

Additionally, the correlation analysis among MLQ and ARSMA factor scores show that Marginality factor scores for Anglo, Latino, and Latino American/Hispanic American significantly relate to transactional leadership behaviors, which were passive: *Management-by-Exception (Passive)* and *Laissez-Faire Leadership*.

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Table 4.5

Correlations among MLQ and ARSMA Factor Scores

	Anglo Orientation	Latino Orientation	Anglo Marginality	Latino Marginality	Latino/Hispanic American Marginality
II(A)	.14**	.05	-.06	-.07	-.03
II(B)	.13*	.20**	.00	.01	-.02
IM	.10	.20**	-.07	-.03	-.02
IS	.03	.20**	.14**	.03	.04
IC	.05	.17**	.02	-.03	.04
CR	.14**	.11*	.02	.00	.02
MEA	.03	.14**	.14**	.08	.10
MEP	.01	-.16**	.12*	.13*	.13*
LF	-.08	-.14**	.18**	.15*	.17**
EE	.10	.17**	-.02	-.02	-.10
EFF	.15**	.12*	-.04	-.07	-.10
SAT	.10	.09	-.05	-.02	-.10

Note: <u>Transformational leadership behaviors</u>: II (A) - Idealized (Attributed), II (B) - Idealized (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC - Individual Consideration. <u>Transactional leadership behaviors</u>: CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and FF - Laissez-Faire Leadership. <u>Leadership outcomes</u>: EE – Extra effort, EFF – Effectiveness, and SAT – Satisfaction. * p < .05 ** p < .01

In general, the data show that the Latino Orientation scale relates to all MLQ leadership behaviors whereas the Anglo Orientation relates to only three leadership behaviors, while Marginal scales of acculturation showed a relationship with transactional leadership behaviors which were passive.

In order to see if there was a correlation between ARSMA and Individualism/Collectivism factor scores, I conducted a correlation analysis of both sets of variables. The results show a significant relationship between acculturation and individualism/collectivism styles specifically related to patterns of both horizontal and vertical tendencies. Below is the discussion of the findings.

Anglo Orientation has a significant relationship with horizontal collectivism while Latino Orientation has significant relationship with both horizontal and vertical collectivism. Furthermore, the data reveal that Anglo Marginality has a significant relationship with horizontal individualism whereas Latino American/Hispanic American Marginality has a significant relationship with horizontal collectivism. Table 4.6 shows the correlation results of factor scores among ARSMA and I-C Vertical and Horizontal factor scores, as stated above.

Table 4.6

Correlations among ARSMA and I-C Vertical and Horizontal Factor Scores

	HI	VI	HC	VC
Anglo Orientation	.02	.10	.11*	.02
Latino Orientation	.11	-.12	.30**	.21**
Anglo Marginality Orientation	.20**	.10	-.03	.04
Latino Marginality Orientation	.11	.10	-.13	-.10
Latino/Hispanic American Marginality Orientation	.13*	.10	-.14**	-.02

Note: HI – Horizontal Individualism, VI – Vertical Individualism, HC – Horizontal Collectivism, and VC - Vertical Collectivism. * p < .05, ** p < .01

Additionally, cross tabulation analyses were conducted to examine the relationship of acculturation and generational status. The data suggest that 1st and 2nd generational status were level III of acculturation or slightly Anglo oriented bicultural. The data indicate that there is a significant relationship between acculturation and generational status (Cuéllar et al., 1995).

Discussion of the acculturation and leadership data is presented in Chapter V.

Relationship of Individualism/Collectivism to Self-perceived Leadership Style Data

The following section provides the results of the statistical analyses for the third research question, which poses: *What is the relationship of individualism/collectivism on the relationship between leadership and acculturation? Specifically, how does individualism and collectivism relate to Latino women's self-perceptions of their leadership style?*

In order to analyze the relationship of individualism/collectivism in the relationship between leadership and acculturation, I conducted a correlation analysis among MLQ and I-C Vertical and Horizontal factor scores. The results of these analyses show the following: *Horizontal Individualism* relates to three transformational (*Idealized Influence [Attributed], Intellectual Stimulation, Individualized Consideration*) leadership behaviors and one transactional (*Management-by-Exception [Active]*) leadership behavior, whereas *Vertical Individualism* relates to one transformational (*Idealized Influence [Attributed]*) leadership behavior.

Horizontal and *Vertical Collectivism* relate to all leadership behaviors and outcomes with the exception of two transactional (*Management-by-Exception [Active]* and *Management-by-Exception [Passive]*) leadership behaviors. Specifically, the data reveal that collectivism styles are more related than individualism styles to all MLQ leadership behaviors within factors of transformational/transactional, but are not related to *Management-by-Exception [Active and Passive]* leadership behaviors.

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Furthermore, individualism style may be more related to individualized active

leadership behaviors but not related, specifically to outcomes. These leadership

behaviors were *Idealized Influence (Attributed), Intellectual Stimulation,*

Individualized Consideration, and *Management-by-Exception (Active).* Table 4.7

shows the correlations among MLQ and I-C Vertical and Horizontal factors scores,

which discuss the results of these analyses.

Table 4.7

Correlations among MLQ and I-C Vertical and Horizontal Factor Scores

Variables	HI	VI	HC	VC
Idealized Influence (Attributed)	.12*	.12*	.23**	.13*
Idealized Influence (Behavior)	.10	.02	.30**	.22**
Inspirational Motivation	-.02	.02	.30**	.13*
Intellectual Stimulation	.12*	.01	.30**	.14**
Individualized Consideration	.15**	.10	.30**	.14**
Contingent Reward	.10	.10	.30**	.14**
Management-by-Exception (Active)	.11*	.10	.10	.10
Management-by-Exception (Passive)	-.03	.10	-.10	-.04
Laissez-Faire Leadership	.01	.10	-.21**	-.14**
Extra Effort	.02	.05	.32**	.20**
Effectiveness	.10	.01	.31**	.21**
Satisfaction	.10	.05	.31**	.21**

Note: HI – Horizontal Individualism, VI – Vertical Individualism, HC – Horizontal Collectivism, and VC - Vertical Collectivism. * p < .05 ** p < .01

As shown in the above table, results of correlation analysis indicate that there

is a significant relationship between Individualism/Collectivism (Vertical and

Horizontal) and leadership behavior variables. The data indicate that transformational

leadership behaviors are significantly related to collectivism factors, whereas

transactional leadership behaviors are significantly related to individualistic factors.

Furthermore, the data suggest that transformational collectivistic leadership behaviors

encompass transactional leadership behaviors (*Contingent Reward* and *Laissez-Faire Leadership*). This finding indicates a significant relationship with both collectivism vertical and horizontal variables. Additionally, the data suggest that collectivism is related to leadership outcomes.

The data show that individualism is significantly related with active transactional leadership behaviors (*Management-by-Exception [Active]*) that use transformational factors such as (*Idealized Influence [Attributed], Intellectual Stimulation, Individualized Consideration*). This finding suggests that individualism is correlated with transactional and transformational leadership behaviors that may use an individualistic approach to leadership. The data further suggest that individualism is related to leadership behaviors but not to leadership outcomes.

In depth discussion of the data on individualism/collectivism to self-perceived leadership style data are presented in Chapter V.

Canonical Correlation Results

In this section, the results of the canonical correlation analysis are presented. Canonical correlation was performed between the set of leadership and acculturation, and individual collectivism variables using SPSS. Through canonical correlation analysis, I investigated the relationship between these two sets of variables. These sets of variables are defined within the context of leadership and acculturation including individualism/collectivism. In order to provide a comprehensible summary of the results, the following sections will address: (a) description of variables; (b) canonical correlation process and results; (c) interaction analysis and results; (d) interaction analysis; and (e) leadership outcomes analysis.

Description of Variables

There were a total of twelve leadership variables and nine acculturation variables. The acculturation variables were divided into two groups: five acculturation variables and four individualism/collectivism variables. A description of these variables is presented below.

Leadership set. The leadership set is based on the Avolio & Bass (2004) Multifactor Leadership Questionnaire. This set included both leadership behaviors towards transformational and transactional styles, as well as leadership outcomes. These are comprised of the following nine leadership variables and three leadership outcomes, for a total of twelve leadership variables. *Transformational leadership behaviors*: II (A) - Idealized Influence (Attributed), II (B) - Idealized Influence (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC -

Individual Consideration. Both Attributed and Behavior of Individualized Influence embody Charismatic leadership behavior (Bass, 1998). *Transactional leadership behaviors:* CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and LF - Laissez-Faire Leadership. *Leadership outcomes*: EE – Extra effort, EFF – Effectiveness, and SAT – Satisfaction.

   Acculturation set. The acculturation set is based on the Cuéllar (1995) ARSMA II questionnaire. This set measured acculturation towards both Anglo (i.e., White/Caucasian/U.S. American) and Latino (i.e., Spanish heritage), which are comprised of the following five variables: *Anglo Orientation; Latino Orientation; Anglo Marginality; Latino Marginality*; and *Latino/ Hispanic American Marginality*. Additionally, the acculturation set measured individualism and collectivism styles based on horizontal or vertical dimensions, which are comprised of the following four variables: *Horizontal Individualism (HI); Vertical Individualism (VI); Horizontal Collectivism (HC);* and *Vertical Collectivism (VC).*

Canonical Correlation Process and Results

This section describes both the process and the results of the canonical correlation analysis between leadership and acculturation conducted in this research; specifically: (a) Preliminary analyses (b) set of variables, (c) root significance, (d) canonical correlation, and (e) interpretation of roots. In depth discussion of the results of the canonical correlation will be presented in Chapter V.

Preliminary analyses. Initially, I used factor analysis to look for possible multicolleniarity among the leadership dimensions, and the acculturation and individualism/collectivism dimensions, respectively. Among both the set of leadership, and set of acculturation and I-C vertical and horizontal factors, no communalities approached 1.00. Therefore, there is no threat of multicolleniarity among either the set of leadership or the set of acculturation variables.

No transformations were necessary to improve linearity of relationship between variables and normality of their distributions. In addition, no within-set multivariate outliers were identified at p<.001, therefore assumptions regarding within-set multicollinearity were met.

Set of variables. I used two sets of variables associated with leadership and acculturation dimensions. The first set was the leadership set based on multifactor leadership behaviors of both transformational and transactional factors. The second set was the acculturation and individualism/collectivism vertical and horizontal variables.

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Root Significance. There were two significant roots found. The first root, with an eigenvalue of 3.46, accounted for 38.41% of the total variance, Wilk's Lambda= 0.60, chi square=181.99, p<.001. The second root, with an eigenvalue of 1.49, accounted for 16.54% of the total variance, Wilk's Lambda= 0.80, chi square=98.18, p<.001. The data suggest that these two roots are significantly related to leadership and acculturation.

Canonical correlation. The first root's canonical correlation was .50 (25% variance). The second root's canonical correlation was .30 (9% of variance).

Interpretation of roots. The structure coefficients were examined to determine the meaning of the canonical variates. A loading of .30 was used to determine if a dimension contributed to the meaning of the canonical variate. Roots I and II reflect a significant relationship within leadership and acculturation. The 15% of total redundancy indicates that the canonical variates were significantly related, and therefore, the data suggest that there is a significant relationship between leadership and acculturation.

Root I. In this Root, data reflect a significant correlation between leadership and acculturation within a Latino Orientation. Specifically, this root reveals a relationship of collectivism with multiple-factor leadership behaviors.

In the acculturation set, Root I shows a relationship with Latino Orientation (-.59) with Horizontal Collectivism (-.84) and Vertical Collectivism (-.50). This finding suggests that acculturation is significantly correlated to Latino Orientation (-.59) with both Horizontal (-.84) and Vertical (-.50) collectivism styles.

In the leadership set, Root I shows a significant relationship with both transformational and transactional leadership behaviors: Idealized Influence [Behavior] (-.77), Inspirational Motivation (-.74), Contingent Reward (-.72), Individualized Consideration (-.68), Intellectual Stimulation (-.62), Idealized Influence [Attributed] (-.55), Laissez-Faire Leadership (.49), and Management-by-Exception [Active] (-.31). The data reveal a multi-factor leadership pattern of both transformational and transactional styles, with the exclusion of management-by-exception (Passive). This finding suggests that a Latina-collectivistic cultural orientation is related to an active transformational leadership style.

Root II. In this Root, data reflect a significant correlation of leadership and acculturation within the Marginality acculturation level. Specifically, this root reveals a relationship between individualism and transactional leadership behaviors.

In the acculturation set, Root II showed a correlation between three acculturation factors of Anglo Marginality (.90), Latino American/Hispanic American (.58), and Latino Marginality (.43) with two individualism factors; both Horizontal Individualism (.57) and Vertical Individualism (.33). The data suggest that individuals with Marginality Orientation tend to exhibit vertical and horizontal individualistic styles, thus Root II is named Marginalized Individualistic Orientation.

In the leadership set, Root II shows variables that correlated to four out of nine multifactor leadership factors. The leadership behaviors that were significantly related to marginal acculturation levels were: Laissez-Faire leadership (.59), Intellectual Stimulation (.49), Management-by-Exception [Active] (.47), and

Management-by-Exception [Passive] (.40). The data suggest that an individualistic and

Marginalized cultural orientation is related to a passive and transactional leadership

style. Table 4.8 shows the details of the canonical correlation analysis and its

findings.

Table 4.8

Canonical Correlation between Leadership and Acculturation Set of Variables

	ROOT I	ROOT II
Acculturation Set		
ANGLO ORIENTATION	-.29	-.15
LATINO ORIENTATION	-.59	.02
ANGLO MARGINALITY	.05	.90
LATINO MARGINALITY	.07	.43
LATINO AMERICAN/HISPANIC AMERICAN MARGINALITY	.04	.58
Individualism/Collectivism		
HORIZONTAL INDIVIDUALISM	-.24	.57
VERTICAL INDIVIDUALISM	-.09	.33
HORIZONTAL COLLECTIVISM	-.84	-.01
VERTCAL COLLECTIVISM	-.50	.03
Leadership Set		
IDEALIZED INFLUENCE (ATTRIBUTED)	-.55	.08
IDEALIZED INFLUENCE (BEHAVIOR)	-.77	.01
INSPIRATIONAL MOTIVATION	-.74	-.26
INTELECTUAL STIMULATION	-.62	.49
INDIVIDUALIZED CONSIDERATION	-.68	.29
CONTINGENT REWARD	-.72	.19
MANAGEMENT-BY-EXEPTION (ACTIVE)	-.31	.47
MANAGEMENT-BY-EXEPTION (PASSIVE)	.22	.40
LAISEZ-FAIRE LEADERSHIP	.49	.59
Canonical Correlation	.50	.30

Note: * p < .05 ** p < .01

Interaction Analysis

Acculturation theory suggests that it is important to understand how Latino and Anglo acculturation work together. Specifically, acculturation theory establishes the modes of acculturation processes, such as Assimilation, Integration, Marginalization, and Separation (Cuéllar, 2000; Cuéllar et al., 1995); and how these modes of acculturation can be examined by forming an interaction term from the Latino and Anglo acculturation scales. I created an interaction term naming it Anglo-Latino Orientation. I then re-ran the canonical correlation analyzes, adding this new interaction term to the set of variables of acculturation. The set of variables used were: Anglo Orientation, Latino Orientation, Anglo Marginality, Latino Marginality, and Latino American/ Hispanic American Marginality; and Horizontal Individualism, Vertical Individualism, Horizontal Collectivism, and Vertical Collectivism with Anglo-Latino Orientation.

The results of this canonical correlation were identical to the results of the analyzes of acculturation without the interaction term. This suggests that the interaction of Anglo-Latino does not add or contribute additional variance in the prediction of the relationship of acculturation and leadership behavior.

Leadership Outcomes Analysis

In this section, I describe the process and the results of the canonical correlation analyzes between leadership outcomes and acculturation. Specifically, I discuss: (a) process, (b) set of variables, (c) root significance, (d) canonical correlation, and (e) interpretation of root. In depth discussion of these results is presented in Chapter V.

Set of variables. I used two sets of variables associated with leadership outcomes and acculturation dimensions. The first set was the leadership outcomes set, comprised of three variables (Extra Effort, Effectiveness, and Satisfaction). The second set was the acculturation variables, comprised of acculturation levels (Anglo Orientation, Latino Orientation, Anglo Marginality, Latino Marginality, and Latino American/ Hispanic American Marginality) with four individualism/collectivism dimensions (Horizontal Individualism, Vertical Individualism, Horizontal Collectivism, and Vertical Collectivism).

Root Significance. There was one significant root found, with a Wilk's Lambda= 0.81, chi square= 74.61, p<.001. The data suggest that this root is significantly related to leadership outcomes and acculturation.

Canonical correlation. The root's canonical correlation was .39 (15% of the variance explained). It examined the relationship between acculturation and individualism/collectivism, with leadership outcomes.

Interpretation of roots. A loading of .30 was used in determine if a dimension contributed to the meaning of the canonical variate. Root I seemed to reflect a significant relationship within leadership outcomes and acculturation. In this Root, data reflect a significant correlation of leadership outcomes and acculturation within a Latino Orientation and Collectivism. Specifically, this root reveals a relationship of collectivism with leadership outcomes.

In the acculturation set, Root I shows a relationship with Latino Orientation (-.42) with Horizontal Collectivism (-.87) and Vertical Collectivism (-.48). It suggests that acculturation is significantly correlated to Latino Orientation with both Horizontal and Vertical collectivism style.

In the leadership set, Root I shows a significant relationship with Extra Effort (-.96), Satisfaction (-.81), and Effectiveness (-.71) in leadership outcomes. The data suggest that acculturation relate to leadership outcomes with regards to Latino Orientation and Collectivism styles. This root thus suggests that a Latina collectivistic cultural orientation was related to effective self-perceived leadership. Table 4.9 shows the details of the canonical correlation analysis and its findings, which depicts that there is a relationship between Latino orientation, collectivism, and leadership outcomes.

Table 4.9

Canonical Loadings: Leadership Outcomes

VARIABLES	ROOT I
Anglo Orientation	-.28
Latino Orientation	-.42
Anglo Marginality	.08
Latino Marginality	.06
Latino American/Hispanic American Marginality	.25
Horizontal Individualism	-.10
Vertical Individualism	-.14
Horizontal Collectivism	-.87
Vertical Collectivism	-.48
Extra Effort	-.96
Effectiveness	-.71
Satisfaction	-.81

Note: * $p < .05$ ** $p < .01$

Additional Analysis Results

The following section provides the results of the additional analysis conducted for this research study. In this section, I present the data analysis obtained when conducting correlation analyses using certain survey questions: (1) Question 2 – *In what year were you born?*; (2) Question 5 – *How many children do you have?*; (3) Question 8 – *What is your highest level of education that you have completed?*; (4) Question 11 – *What is your current rank/pay grade?*; (5) Question 13 – *What is the highest level of military education/training you have completed?*; and (6) Question 14 – *Generation that best describes you*.

Table 4.10 shows the correlation analysis based on the responses to the above stated questions.

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Table 4.10

Correlation of Leadership, Acculturation, I-C, and Demographic Variables

	Birth Date	Children	Highest Education	Military Education	Rank	Generation Status
Idealized Influence (Attributed)	-.14**	.07	.10*	.11*	.04	-.01
Idealized Influence (Behavior)	-.16**	.07	.01	.18**	.10	-.08
Inspirational Motivation	-.17**	.11*	.12*	.14**	.12**	-.11*
Intellectual Stimulation	-.07	.01	.09	.11*	.05	-.00
Individualized Consideration	-.26**	.13*	.17**	.19**	.16**	-.02
Contingent Reward	-.06	-.03	.08	.09	.04	-.06
Management-by-Exception (Active)	.08	.02	-.02	-.09	-.07	-.06
Management-by-Exception (Passive)	.14**	-.12*	-.11*	-.17**	-.06	.13*
Laissez-Faire Leadership	.10	-.05	-.03	-.12*	-.07	.07
Extra Effort	-.18**	.13*	.13*	.23**	.13*	-.08
Effectiveness	-.14**	.10	.15**	.17**	.14**	-.03
Satisfaction	-.08	.11*	.07	.07	.04	-.06
Anglo Orientation	.01	-.02	.05	-.04	.04	.22**
Latino Orientation	-.04	.02	.01	.01	-.08	-.45**
Anglo Marginality	.07	-.02	.03	-.04	-.04	.01
Latino Marginality	-.12*	.06	.09	.06	.07	-.082
Latino American/Hispanic American Marginality	-.06	.01	.11*	.01	.05	-.13*
Horizontal Individualism	.02	-.08	.05	-.14	-.04	.01
Vertical Individualism	.09	-.06	.02	-.05	-.05	.19**
Horizontal Collectvism	-.05	.03	.08	.04	.01	-.06
Vertical Collectivism	-.08	.19**	.06	.05	.07	-.08

Note: * p < .05 ** p < .01

The correlation analyses suggest the following:

Correlation by date of birth data shows a correlation with eight of twenty one leadership and acculturation variables. The correlation analysis indicated that there was a significant relationship with date of birth (i.e.., the older the person was) with leadership and acculturation. In leadership, the data suggested a relationship with the following leadership behaviors: Idealized Influence (Attributed) (-.14); Idealized Influence (Behavior) (-.16); Inspirational Motivation (-.17); Individualized Consideration (-.26); Management-by-Exception (Passive) (.14) and the following leadership outcomes: Extra Effort (-.18) and Effectiveness (-.14); and in acculturation with Latino Marginality (-.12). The data suggest a relationship between age with marginality acculturation and transformational leadership behaviors with levels of leadership outcomes of Extra Effort and Effectiveness.

The data on number of children show a correlation with six of twenty-one leadership and acculturation variables. The correlation analysis indicated that there was a significant relationship with having children to leadership and acculturation. The data suggested a relationship with the following leadership behaviors: Inspirational Motivation (.11), Individualized Consideration (13), Management-by-Exception (Passive) (-.12) and leadership outcomes Extra Effort (.13) and Satisfaction (.11), and acculturation based on Vertical Collectivism (.19). The data reveal a relationship between having children, transformational and transactional leadership behaviors, and collectivistic acculturation orientation. The transformational

leadership behaviors were Motivation and Consideration. The transactional leadership behaviors were passive. The leadership outcomes were Extra Effort and Satisfaction.

The data on highest educational level reveal a correlation of seven of 21 leadership and acculturation variables. The correlation analysis indicated that there was a significant relationship with the highest education level of the respondent to leadership and acculturation. In leadership, the data suggested a relationship with the following leadership behaviors, both transformational and transactional: Idealized Influence (Attributed) (.10), Inspirational Motivation (.12), Individualized Consideration (.17), Management-by-Exception (Passive) (-.11), and leadership outcomes Extra Effort (.13) and Effectiveness (.15), and in acculturation with Latino American/Hispanic American Marginality (.11). The findings reveal a relationship of marginality with leadership styles of transformational (active) and transactional (passive), which related in turn to leadership outcomes of Extra Effort and Effectiveness.

The data on highest military education level reveal a correlation with nine of twenty-one leadership and acculturation variables. The canonical correlation analysis indicated that there was a significant relationship between the highest military education level of the respondent with leadership and acculturation. In leadership, the data suggested a relationship with the following leadership behaviors, both transformational and transactional: Idealized Influence (Attributed) (.11), Idealized Influence (Behavior) (.18), Inspirational Motivation (.14), Intellectual Stimulation (.11), Individualized Consideration (.19), Management-by-Exception (Passive) (-.17),

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Laissez-Faire Leadership (-.12); and leadership outcomes Extra Effort (.23) and Effectiveness (.17). The findings suggested a relationship between highest military education with leadership styles of transformational (Active) and transactional (Passive) which related to leadership outcomes of Extra Effort and Effectiveness, but no relationship with acculturation. The findings reveal a similar pattern for the highest civilian education, with the exception of Laissez-Faire Leadership and Intellectual Stimulation with Marginality as factors of correlation. The data further indicate that there is a relationship between leadership and acculturation in terms of educational patterns.

Rank/Pay grade status is not significantly related to Roots I and II with a Pearson Chi-square (.751). The data show a correlation with four of twenty-one leadership and acculturation variables. The canonical correlation analysis indicated that there was a significant relationship between rank status and leadership. In leadership, the data suggested a relationship with the following transformational leadership behaviors: Inspirational Motivation (.12); Individualized Consideration (.16); leadership outcomes Extra Effort (.13) and Effectiveness (.14). The data suggest that there is no acculturation relationship with rank and leadership, thus the only significant relationship is with leadership behaviors of a transformational nature and its resultant leadership outcomes.

Generational status is significantly related to Root I (.457) and Root II (.303) canonical correlation. The data shows a correlation with six of twenty-one leadership and acculturation variables. The canonical correlation analysis indicated that there

was a significant relationship between generational status with leadership and acculturation. In leadership, the data suggested a relationship with the following leadership behaviors: Inspirational Motivation (-.11); Management-by-Exception (Passive) (.13) with acculturation Anglo Orientation (.22) and Latino Orientation (-.45). For acculturation in particular, the data suggested a relationship between generational status with marginality in the following factors: Latino American/Hispanic American Marginality (-.13) and Vertical Individualism (.19). This finding suggests a relationship between leadership and acculturation with the generational status of individuals having leadership styles characterized by the factors mentioned above.

In depth discussions of the additional analyses are presented in Chapter V.

Chapter V: Discussion

Leadership and Acculturation

In exploring the relationship between self-perceived leadership style and acculturation of Latino women, I examined leadership, acculturation and individualistic/collectivistic variables in a sample of Latina officers in the United States Army. The aim of this study was to investigate how acculturation and individualistic/ collectivistic attitudes relate to leadership, by examining the relationship between leaders' self-perceived leadership behavior (e.g., knowledge, skills, and attitudes) and level of acculturation, and individualism/collectivism dimensions. In this research, I used three main survey instruments to explore leadership and acculturation of Latinas: the Multifactor Leadership Questionnaire (MLQ), the Acculturation Rating Scale for Mexican Americans- II (ARSMA-II revised for Hispanic/Latinos), and the Individualism/ Collectivism Vertical and Horizontal Scale (I-C).

The MLQ provides an assessment of leadership based on nine leadership behaviors *(Idealized Influence [Attributed], Idealized Influence [Behavior], Inspirational Motivation, Intellectual Stimulation, Individual Consideration, Contingent Reward, Management-by-Exception [Active], Management-by-Exception [Passive],* and *Laissez-Faire Leadership)* and three leadership outcomes *(Extra-effort, effectiveness* and *satisfaction)*. Through the components of transformational leadership, five leadership behaviors, or 5 I's, assess the leader's transformational dimension. For instance, the 5 I's describe leadership behaviors that inspire, motivate, stimulate, and are considerate of others' higher potential. According to Avolio and Bass (2002), transformational leadership

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is an expansion of leadership (p. 1), while transactional leadership emphasizes the transaction or exchange between the leaders and the followers. The components of transactional leadership are related to rewards or disciplines in which performances are positively or negatively handled by leaders.

The ARSMA II provides an assessment of the acculturation orientation of the leader (e.g*., Anglo Orientation, Latino Orientation, Anglo Marginality Orientation, Latino Marginality Orientation, and Latino American/Hispanic American Marginality Orientation*.), while the I-C provides an assessment of individualism/collectivism behaviors of the leader (e.g., *Vertical/Horizontal and Individualism/Collectivism*), which further explains acculturation orientations. Details of these instruments are provided in the literature review of this study.

In order to provide a comprehensive discussion of the findings, the following sections address: (a) overview of findings; (b) Latino women's self-perceptions of their leadership style; (c) relationship of acculturation and leadership; (d) relationship of acculturation and individualism/collectivism; (e) relationship of individualism/ collectivism to self-perceived leadership style; (f) discussion of the results of canonical analysis; (g) discussion of additional analyses; (h) implications of findings; and (i) limitations and directions for future research.

Overview of Findings

Current leadership theories do not address the relationship of acculturation to leadership. Moreover, the term leadership is synonymous to organizational success based on individual leadership behaviors, qualities, talents, and skills. Leadership is thus still "understood as an individual activity" (Moxley, 2000 , p. 8), and therefore, there is a need to understand leadership and individual self-perception of leadership style as a critical factor in leadership development, retention, and advancement.

This research explores the relationship between leadership and acculturation of Latino women leaders using three research questionnaires on leadership, acculturation, and individualism/collectivism. The results indicate that there is a significant relationship between leadership and acculturation. As expressed in the first research question, the study was specifically intended to investigate the participants' self-perceptions of their leadership style in terms of the nine leadership behaviors as measured by the MLQ. The second research question addressed whether the study's participants' acculturation scores were significantly related to any of the nine leadership behaviors as measured by the MLQ. The third research question addressed whether the study's participants' individualism/collectivism scores were significantly related to any of the nine leadership behaviors as measured by the MLQ. The study's intent was to find out how much of the variance in each of the nine leadership behaviors (including three leadership outcomes) was explained by the participants' acculturation and individualism/collectivism orientation.

The study's findings suggested that a relationship existed between the leaders' self-perceived leadership behavior and their acculturation. Specifically, these findings reveal that there is a significant relationship between acculturation and individualism and collectivism styles, predominantly related to the acculturation orientation of the individual. This suggests that the relationship between leadership and acculturation is significantly related to Latino orientation and collectivism attributes. This finding is consistent with literature on Latino culture (Acosta-Belén, 1979; Arredondo, 1991; Bonilla-Santiago, 1992; Brice, 2001; J. García, 2003; Garcia & Lega, 1979; Griggs & Dunn, 1996; Hui, 1988; Knight et al., 1993; Marín & Gamba, 1996; Mirande & Enríquez, 1979; Novas, 1994; F. Padilla, 1985b; Santiago-Rivera et al., 2002; Shkodriani & Gibbons, 1995; Szapocznik, Scopetta, & Aranalde, 1978). Because little is known on Latina leadership, these findings cannot be compared directly to other research studies. However, using the available literature, I offer explanations based on related research in order to understand the relationship between leadership and acculturation of Latinas. Thus, the study's intent is to explore, understand, and provide the grounds for future research of leadership behaviors within acculturation and individualism/collectivism theories that significantly call for additional research.

Next, I provide a discussion of the findings for each research question, including possible explanations and interpretations. Implications of findings for theory and practice, limitations, and suggestions for future research are also discussed.

Latino Women's Self-perceptions of their Leadership Style

Leadership style is an individual choice. Understanding self-perceptions of leadership is important to the development of current and future leaders for any successful organization. Leadership characteristics, skills, and approaches of effective and efficient performance are centered in the leader's style. In order to maintain a competitive edge, U.S. Army doctrine calls for self-development in order to exploit the full potential of leaders. Military policies and regulations define leadership as a process in which leaders' progressive development is directed both personally and organizationally (Army, 1993; Department of the Army, 1993). Therefore, leadership self-perception at any level of the organization is crucial for success (Army Research Institute for Behavioral and Social Sciences [ARI], 2004; Avolio, 1999a; Bass, 1990; Burns, 1978).

There are five major findings concerning Latino women's self-perceptions of their leadership style: (a) Latina leadership behaviors are similar to those in the U.S. population, in terms of the relative ranking of perceived importance; (b) the Latina leadership profile is different from U.S. population norms, in terms of the absolute level of self-reported leadership behaviors; (c) transformational leadership behavior is a prototype of Latina leadership style; (d) Latina leadership style has a similar correlation with U.S. normative sample; (e) leadership behaviors are similarly intercorrelated in the Latina and the U.S. normative sample.

Latina Leadership Behaviors are Similar to U.S. population

This study's results show that the patterns of means from the participant's responses to the MLQ 5X (Self-Rated, Level 0 Form) for both the U.S. Army Latina Officers (N= 375) and U.S. normative samples (N= 3,375) nine leadership behaviors and three leadership outcomes are almost identical. This finding indicates that the respondents' results to the MLQ are conceptually similar. Also, the similarity in the patterns of means seems to suggest that both leaders (i.e., Latinas and U.S. normative samples) can be expected to show similar transformational and transactional leadership styles. Specifically, the results indicate that Latinas' multifactor leadership behaviors and outcomes are in accordance with the full-range of leadership, at least in the United States context (Avolio, 1999a; Avolio & Bass, 1991, 2004; Avolio & Locke, 2002; Bass, 1985, 1996).

The Multifactor Leadership Theory supports these findings. The MLQ Theory establishes that leaders exhibit multiple leadership behaviors (Bass & Avolio, 2000). Specifically, the multifactor leadership theory indicates the unifying theory of leadership building on philosophical and ontological assumptions (Antonakis, 2001) from previous leadership approaches by many scholars (Argyris, 1957; Bennis, 1989; Burns, 1978; Downton, 1973; Hersey & Blanchard, 1976; House, 1996; McGregor, 1985; N. M. Tichy & Devanna, 1986; Weber, 1947).

The present study is consistent with other studies such as Bass (1985), and Avolio and Bass' (1991) research on multi-factor leadership behaviors, which found that leaders exhibit both transformational and transactional behaviors, regardless of their ethnic culture (e.g., Oceania, Europe, Singapore) (Avolio & Bass, 2004). Bass (1996) established that

leaders possessed both transformational and transactional leadership behaviors that

differentiate leadership style. The leader then relates differently to colleagues, followers,

and supervisors (see Figure 5.1). These differences encompass different behaviors that are

likely to emerge in different circumstances (Bass & Avolio, 1994a), particularly learned

behavior from the organizational culture (Deal & Kennedy, 1982), and particularly related

to U.S. norms (Avolio & Bass, 2004).

Figure 5.1

Transformational/Transactional Leadership (Bass, 1997, p. 66)

Transformational Behaviors	Transactional Behaviors
- Transcends self-interests - Works to change the organizational culture - Envisions - Builds self-esteem and confidence - Enables, coaches, mentors - Empowers	- Caters to self-interests - Works within the - organizational culture - Plans - Promises and rewards - Disciplines and corrects - Controls

Furthermore, as evident from the empirical data, the findings indicate that Latinas

in the U.S. Army exhibited both transformational and transactional behaviors. These are

compelling findings since the literature (Avolio, Bass, & Jung, 1999; Avolio & Gibbons,

1988; Avolio & Locke, 2002; Bass, Avolio, Jung, & Berson, 2003; Bass & Steidlmeier,

1999; Howell & Avolio, 1993; Tepper & Percy, 1994) indicates that leaders exhibit both

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leadership behaviors. These scholars examined the relationship of the transformational

and transactional dimensions, and found that leaders display both leadership behaviors.

In addition, this finding is also consistent with the Bass et al. (2003) study on

transformational and transactional leadership in the military. Although their research was

directed towards the leadership style of 72 light infantry rifle platoon officers, their study

showed that military leaders tend to use both transformational and transactional

dimensions. Repeated MLQ investigations (Avolio & Bass, 2004) have shown that leaders

have both transformational and transactional leadership behaviors, which further confirm

and validate the findings of this study.

Another explanation for this finding is through the understanding of culture and its

relationship with leadership behavior in both organizational and human cultures.

Arredondo (1996) posited that individuals have tendencies to follow dominant U.S. culture

models instilled through organizational practices. Thus, in my sample, Latinas are in a

U.S. dominant culture but yet maintain their own Spanish Latino/Hispanic heritage and

culture as part of their identity (Arredondo, 1991, 1996; Brice, 2001; Duignan & Gann,

1998). Therefore, the similarities of leadership to the U.S. normative sample suggest that

Latinas in the U.S. Army follow U.S. cultural norms, specifically with U.S. Army culture.

Moreover, U.S. Army organizational culture is maintained through its traditions,

stories, ceremonies, and rituals that shape the norms and behaviors of both, the group and

the individuals within; as well as their interactions with each other (Bass, 1996). Thus, it is

not surprising to see that Latinas in the U.S. Army perceive their leadership style to be

similar to that of the U.S. population. This finding can be explained by the fact that the

participants were Latino women officers in the U.S. Army., and therein espoused both

U.S. (e.g., general population) and U.S. military cultural norms. Although these women

identified themselves as Latinas/Hispanics of Spanish-speaking heritage, they also

identified themselves as Americans (González, 2000; Gracia, 2000; Leal, 2003).

Latina Leadership Profile is Different from U.S. Population

The results of this study indicate that although Latinas perceived their leadership style to be similar to the U.S. population in terms of the relative ranking of the leadership behaviors, there are dissimilarities in the sequence order of means within the nine leadership behaviors. The data show a slightly different sequence order of leadership behaviors between this sample and the U.S. normative sample (Avolio & Bass, 2004) (See Table 5.1). The differences in sequence order demonstrate slightly different leadership dynamics based on transformational selected behaviors that may be driven by either organizational culture, being Latina, or both. According to Bass & Avolio, the full-range leadership optimal profile is a pattern of active and effective leadership behaviors combined with passive ineffective leadership behaviors, through a multiple range of leadership factors, specified in nine leadership behaviors: *Idealized Influence (Attributed), Idealized Influence (Behavior), Inspirational Motivation, Intellectual Stimulation, Individualized Consideration, Contingent Reward, Management-by-Exception (Active), Management-by-Exception (Passive), and Laissez-Faire leadership* (Avolio & Bass, 1991).

However, based on the score comparison between U.S. and Latina samples, the findings indicate that the Latinas' leadership profile order is slightly different. The full-range leadership profile of Latinas was: Individualized Consideration, Idealized Influence (Behavior), Inspirational Motivation, Idealized Influence (Attributed), Contingent Reward, Intellectual Stimulation, Management-by-Exception (Active), Management-by-Exception (Passive), and Laissez-Faire leadership whereas the U.S. normative sample range order

was: Individualized Consideration, Inspirational Motivation, Idealized Influence (Behavior), Contingent Reward, Intellectual Stimulation, Idealized Influence (Attributed), Management-by-Exception (Active), Management-by-Exception(Passive), and Laissez-Faire leadership.

The difference of the range order of both the Latinas and U.S. normative samples (see Table 5.1, highlighted areas show differences) indicate that Latinas' leadership behaviors rank differently, thus their leadership behavior profile is not identical to U.S. general population.

Table 5.1

Means Comparison between U.S. Normative and U.S. Latina Officer Samples: By Sequence Order (Avolio & Bass, 2004)

Scale	U.S. (Level=0, N=3375)		Scale	Latinas in the U.S. Army (Level=0, N=375)	
	Mean	Sequence Order		Mean	Sequence Order
II(A)	2.95	6	**II(A)**	3.16	4
II(B)	2.99	3	**II(B)**	3.26	2
IM	3.04	2	**IM**	3.25	3
IS	2.96	5	**IS**	3.11	6
IC	3.16	1	**IC**	3.31	1
CR	2.99	4	**CR**	3.15	5
MEA	1.58	7	**MEA**	1.97	7
MEP	1.07	8	**MEP**	.92	8
LF	.61	9	**LF**	.41	9

Note: <u>Transformational leadership behaviors</u>: II (A) - Idealized (Attributed), II (B) - Idealized (Behavior), IM - Inspirational Motivation, IS - Intellectual Stimulation, and IC - Individual Consideration. <u>Transactional leadership behaviors</u>: CR - Contingent Reward, MEA – Management-by-Exception (Active), Management-by-Exception (Passive), and FF - Laissez-Faire Leadership.

Furthermore, the other 2004 normative samples from different countries show a similar differentiation of the sequence order of means. This finding seems to suggest a different leadership profile for each sample based on MLQ compositions (See 2004 MLQ normative samples from Oceania, Europe, and others) (Avolio & Bass, 2004). Additionally, these normative samples' differences suggest that leaders' leadership behaviors may vary from country to country (House, Hanges, Javidan, Dorfman, & Gupta, 2004). Based on House et al. (2004) empirical evidence, leadership is different by cultural dimension. Therefore, the differentiated rank order of leadership behaviors can be explained by the fact that individuals perceived their leadership style based on their individual culture.

For Latinas, these findings suggest that there may be a connection between ethnic identity and culture that relates to leadership behavior (M. Gómez & Fassinger, 1994; Gracia, 2000; Knowlton, 1992; Larrain, 2000; Mata, 1997; Meier & Steward, 1991). From the nine leadership behaviors, Latina officers chose highly transformational behaviors (e.g., Idealized Influence, Motivation, Contingent Reward, and Intellectual Stimulation). This finding may be related to the fact that the participants are officers in the U.S. Army and are of Latino culture, which both have place high emphasis on direct leadership styles, thus focus on the group (e.g., teamwork and interdependence) (Bonilla-Santiago, 1992; Bordas, 2001; Command General Staff College, 2002; Department of the Army, 2001; H. Garza, 2001; M. Gómez et al., 2001; Gorena, 1996; Hill, 2004).

However, U.S. normative sample indicates higher relationships with motivation: Idealized Influence (Behavior), Contingent Reward, Intellectual Stimulation, and Idealized

Influence (Attributed), which may suggest more an individual dimension focus on performance. These findings suggest that U.S. military culture may exhibit more charismatic behaviors of the transformational dimension than the U.S. general population (Avolio et al., 1994). This finding is supported by Bass (1996), who found that military officers exhibit high transformational and charismatic behaviors (Seltzer, Numerof, & Bass, 1989; Yammarino & Bass, 1990). Avolio et al. (1994) analyzed results from 141 Virginia Military Academy cadets and concluded that MLQ ratings were consistent with transformational and charismatic behaviors of leadership.

Seltzer et al. (1989) found that transformational leadership was higher among Marine Corps commanders. Yammarino and Bass (1990) also found that naval officers were rated more transformational and transactional. Psotka, Legree, and Bartone's military leadership study (2004) on leadership behaviors of West Point cadets show that military leaders display transformational leadership behaviors as an optimal pattern of leadership style. Wong (2002) posits that military leaders assume leadership behaviors of motivational behaviors demonstrating competence in adaptability to the needs of the mission, which are highly transformational. The literature suggests that transformational leadership styles are used for transforming the human dimension within the context of military organizational culture. These investigations also confirm that the U.S. Army (e.g., organizational structure and culture) may influence Latina leadership style. The findings further suggest that the differences between Latino and Anglo culture, and how culture may inter-relate with leadership behaviors, is significantly correlated with acculturation and individualism/collectivism, which is discussed in the next research question.

Transformational Leadership Behavior is a Prototype of Latina Leadership Style

The results of this study show that the overall significant differences between Latinas and U.S. normative samples were that Latinas saw themselves as more transformational and less transactional than the general U.S. leadership population. While small, the differences are significant because the findings suggest that Latinas have a different way of leading through a transformational prototype that makes them unique. Consequently, the MLQ results seem to suggest that the Latina leadership profile may emphasize inspirational and motivational leadership behaviors, which may be driven by two main facts: (1) being in the military, and (2) being a Latina, or vice versa.

Military duty is exemplified by leadership traits and behaviors that are both inspirational and motivational (Burk, 1999; Center for Strategic and International Studies, 2000; Department of the Army, 1990a, 1990b, 1993, 2001, 2003; McCann & Pigeau, 2000; Taylor & Rosenbach, 1992) . According to Burk (1999), military culture has four essential elements: discipline, professional ethos, ceremony and etiquette, and cohesion and esprit de corps. These elements enable the soldiers to contribute to the organization's goals and objectives, particularly shaping service members in cohesion, high levels of enthusiasm and motivation, loyalty, and camaraderie (Center for Strategic and International Studies, 2000). Army leaders are expected to model character, competence, and desire for achieving high standards to their subordinates (Lewis, Butler, Challans, Craig, & Smidt, 2000). Specifically, "these leaders must influence their soldiers in a positive manner, operate to successfully accomplish the mission, and improve both their subordinates and the organization" (Lewis et al., 2000, p. 128).

U.S. Army's leadership doctrine (e.g., framework, components, and interrelationships) focuses on leadership excellence consisting of values, attributes, skills and actions that are inspirational in character (Lewis et al., 2000). FM 22-100, Army Leadership Field Manual, directs military personnel to be, know, and do (e.g., achieve excellence formula) that maximizes values and attributes (*BE*), skills (*KNOW*), and actions (*DO*) to be emulated by those who follow. Through Army leadership training, leaders are taught to use direct leadership styles (e.g., face-to-face, first-line leadership) on a continual basis. Interpersonal skills such as active listening, two-way communication, and nonverbal communication are a common set of skills required to effectively lead in the military (Department of the Army, 1988, 1990a, 1990b, 1993, 2001, 2003, 2004). Among the direct leader's influencing actions, motivating is the most important (Lewis et al). Thus, the ability to motivate subordinates is paramount. Hence, Army leaders are expected to influence by building teams and cementing loyalty (p. 133).

Therefore, it is not surprising to see that Latina Officers' perceptions of leadership are centered in the inspirational and motivational behaviors exemplified by military training, doctrine, and organizational culture. More specifically, the original factor analyses of the MLQ sampling of 196 U.S. Army Colonels show a higher order dimension of transformational leadership that included: Charisma, Inspirational Motivation, Individualized Consideration, Intellectual Stimulation and Contingent Reward (Bass, 1985). Bass' findings support the results of my study: Military leaders see their leadership style as charismatic and motivational, thus active transformational (Bass, 1996).

Furthermore, evidence from this study suggests that Latinas in the military tend to be more transformational than the U.S. normative sample (Avolio & Bass, 2004; Avolio et al., 1994; Avolio et al., 1999). Sergiovanni (1984) explains that organizations often resemble multicultural societies, and subgroups often maintain their individual and cherished identities (p. 107). Latino cultural literature explicates that Latino culture is driven by transformative attitudes (Army Research Institute for Behavioral and Social Sciences [ARI], 2004; Arredondo, 1991; Bandura, 1986; Command General Staff College, 2002; Indvik, 2004; Leal, 2003; Lewis et al., 2000), thus Latina leaders may maintain certain cultural values (A. Padilla, 1994, 1980; A. Padilla & Pérez, 2003; F. Padilla, 1985a, 1985b; R. Padilla & Chávez Chávez, 1995; Portes, 2000; Portes & Rumbaut, 1996; Rhea, 1997; A. Rodríguez, 1999; C. Rodríguez, 2000; Sabogal et al., 1987; Sandoval & De La Roza, 1986) that support transformational leadership behaviors.

Hispanic/Latino culture is very important for Latinos, specifically to recent immigrants (Portes & Rumbaut, 1996; Puig, 2001; Zambrana, 1995). Culture is part of their daily life, where values and traditions are centered. Concepts such as *familia* (family), personalismo (close-knit, personalizing), *simpatía* (sympathy), and *respeto* (respect) (Garcia, 2000) are part of Latino leader's identity. However, Latino cultural values are selective and there are disagreements among researchers as to the meanings and applications of some of these values (Marín & Marín, 1991). It is important to note that Latinos are a heterogeneous group with unique differences among each cultural sub-group. This makes it complex to identify common leadership characteristics. Nevertheless, this

study suggests that Latinas exhibit a leadership profile that mirrors some basic Latino cultural values, as stated above (Oboler, 1995; Reich, 1989; Rhea, 1997).

The results show a preference for transformational and transactional behaviors that are not passive. This finding suggests that Latina leadership style is transformational, and emphasizes transactional behaviors of facilitating the achievement of objectives agreed upon by followers (e.g., contingent reward). In the same vein, Bonilla-Santiago (1992) posits that Latina leadership is characterized by perseverance, assertiveness, self-sacrifice, and empowerment. "Hispanic women in leadership have no problems empowering others. We do have a tendency to let our emotions get in the way" (Dolores Huerta, in Bonilla-Santiago, 1992, p. 99). Theoretical approaches to Hispanic/Latina leadership seem to support this finding, thus outlining that Latinas have a tendency for collective effort, therein transformational (Bonilla-Santiago, 1992; Bordas, 2001; Hurtado & Gurin, 1987; Méndez-Morse, 2000; Mirande & Enríquez, 1979; Moya, 2002; F. Padilla, 1985b; Pérez-Torres, 2000; Portes, 2000; Portes & Rumbaut, 1996; Reza, 1995; Rhea, 1997; Triandis, Marín, Hui, Lisansky, & Ottati, 1984; Triandis, Marín, Lisansky et al., 1984; Trueba, 1999; Trueba et al., 1993). Particularly, the literature indicates that Latina leaders see their leadership style in relation to their *cultura* (culture) (Bonilla-Santiago, 1992; J. García, 2003; Marín & Marín, 1991; Zambrana & Zoppi, 2002).

An example of this cultural difference in leadership is seen in the MLQ result of the Indonesia normative sample (Avolio & Bass, 2004). The means of the Indonesian sample indicates that Indonesians perceived their leadership style to be as transformational as Latinas did. This finding suggest that Latinas differentiate from the U.S. normative

sample in the way they perceived their transformational leadership style, thus their leadership prototype is different. However, Latinas and Indonesians seem to perceive their leadership to be similar within the transformational dimension. More specifically, the empirical data reflect that Latinas have certain transformational leadership behavior preferences that may be divergent from the Anglo culture (e.g., Latino culture and U.S. Army culture). For example, the U.S. Army Culture is more transformational in nature (Avolio, 1999a; Avolio & Bass, 1991, 2004; Bass, 1996, 1997).

According to Army Regulation 600-100 on Army Leadership (Department of the Army, 1993), the total Army leadership policy defines leadership as a process of influencing others in order to accomplish the mission. Thus, military leaders are expected to provide purpose, direction, and motivation to effectively transform human potential into effective performance (Taylor & Rosenbach, 1992). The Army policy on leadership (Command General Staff College, 2002; Department of the Army, 1990a, 1990b, 1993; Williamson, 1988) indicates the need for leaders to use transformational and transactional behaviors as addressed by Bass (1985). U.S. Army doctrine acknowledges that leaders are required to use a mix of leadership skills, knowledge, attitudes, and experiences at all levels of the organizational ladder (p. 1).

Furthermore, Bass (1997) found that cultural contingencies may influence leadership style. For example, Bass (1996) found that there are cultural contingencies in manifesting individualized consideration. Yokochi (1989) found that Japanese CEOs displayed higher transformational than transactional behaviors, specifically related to collective and individualized consideration. In Indonesia, leaders are seen as more

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transformational (Avolio & Bass, 2004; Bass, 1996, 1997). Latina officers perceived

themselves as significantly more transformational than the U.S. normative sample. While

these differences are small, the pattern of means is similar to those found in the Indonesian

sample. Thus, cultural contingencies play a role in leadership behavior. Likewise, Jung,

Sosik & Bass (1995) found that some cultures facilitate transformational behaviors.

Dorfman and House (2004), Avolio et al., (1999), Bass and Avolio (2000) research found

that there are components of both transformational and transactional behaviors more

accepted in a culture than in some cultures than in others.

Leadership Behaviors are similarly Intercorrelated in the Latina and the U.S.

Normative Sample

Inter-scale correlations were almost identical in Latina and U.S. groups. These findings seem to suggest that the scale of the MLQ instrument is almost the same for the Latina sample and the U.S. sample. The findings also seem to indicate that the scale offers an understanding of the perceptions of leadership that appears to identify the similarities among Latino and Anglo leadership behaviors that correspond with sample participants in the U.S.

Management-by-Exception (Active) and Management-by-Exception (Passive) were negatively correlated with transformational leadership styles for the U.S. normative sample. In the Latina sample, Management-by-Exception (Active), Latina leaders perceived their leadership style to be more transformational. Further, in the Latina sample Management-by-Exception (Passive) did not correlate with any of the five transformational leadership behaviors. These findings suggest that for Latinas, Management-by-Exception (Active) was related to transformational rather than transactional leadership behaviors.

Sample items from the MLQ 5X for Management-by-Exception (Active) (e.g., *I focus attention on irregularities, mistakes, exceptions, and deviations from standards; I concentrate my full attention on dealing with mistakes, complaints, and failures; I keep track of all mistakes; and I direct my attention towards failures to meet standards*); and Management-by-Exception (Passive) (e.g., *I fail to interfere until problems become serious; I wait for things to go wrong before taking action; I show that I am a firm*

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believer in "If ain't broke, don't fix it") illustrate the leadership behavior within a style

that is passive or active, in which the leader sets expectations, standards and goals towards

reward or discipline based on the follower's performance (Bass et al., 2003).

Through management-by-exception, the leader's behavior is towards a corrective

transaction (Bass & Avolio, 2000). This suggests that Latina military leaders prefer

leadership styles that are not related to management-by-exception, both active and passive.

Therefore, I posit that Latino women leaders tend to be more assertive in their leadership

style, and prefer leadership behaviors that set up exchanges or agreements in ways

intended to achieve superior results by employing components of transformational

leadership instead of transactional leadership behaviors. This finding is supported by the

data obtained on the MLQ 5X, in which participants scored higher on the transformational

behaviors than in the transactional behaviors (Avolio & Bass, 2004).

Furthermore, this finding suggests that there are some relational differences

between U.S. culture and being Latina (Geertz, 1973; Hofstede, 2001; House et al., 2004;

Hurtado, 1995; Hurtado & Gurin, 1987; Hurtado et al., 1994; Marín & Marín, 1991;

Mendoza & Martínez, 1981; Mindel et al., 1998). The findings suggest that there is an

individual variation of leadership behavior concepts and application of leadership

behaviors that may be based on "specific thought processes, beliefs, understandings or

behaviors from one culture to the other culture" (Bass, 1997, p. 132). Latino culture is

centered in family commitment, which involves loyalty, a strong support system, and

honor (Griggs & Dunn, 1996). The emphasis of cooperation in the attainment of goals is

paramount on the Latino culture, which directly conflicts with the U.S. mainstream

emphasis on individualism. Specifically, Latino culture promotes group effort in responding to problems, thus motivating others to do more through setting challenging expectations which typically involve everyone (Marín et al., 1986; F. Padilla, 1985a; Pérez et al., 1997). Therefore, this finding is similar to the cultural values of Latino women, as well as the military doctrine of leadership as transformational in nature.

Additionally, the Latina sample, Management-by-Exception (Passive) correlated negatively with inspirational motivation. The sample items for Inspirational Motivation (e.g*., I talk optimistically about the future; I talk enthusiastically about what needs to be accomplished; I articulate a compelling vision of the future; I express confidence that goals will be achieved*) track transformational behaviors in which leaders seek ways to motivate and inspire those around them (Avolio & Bass, 2002). For Latinas Management-by-Exception (Passive) conflicts with inspirational motivation, because it's corrective style contradicts the team spirit of providing meaning and optimism through motivational behavior.

Latino culture puts emphasis on nurturing and the dignity of each individual (Griggs & Dunn, 1996), thus leadership behavior may mirror motivational styles. Gómez (1996) found that Latina leaders were passionate, persistent, and rooted in family and Latino/Hispanic culture. Her research targeted the career development of notable Latinas in the U.S. Her findings indicated that Latinas have a strong emphasis on *personalismo* and cultural context derived from *Latinidad*.

Additionally, Gómez (1996) and Cintrón (2003) noted that Latinas maintain Latino cultural norms while navigating U.S. customs that further impact their

development and advancement. This is also supported by Latino scholars, who noted

that Latinos see culture with a "Big C" and therefore, their attitudes, behaviors, and

customs are interrelated to their Latino culture (Cuéllar et al., 1995; Darder et al.,

1997; Marín & Marín, 1991; Mendoza, 1989; A. Padilla & Pérez, 2003). Moreover,

Bordas (2001) posited that Latinas create compassionate environments that forge

consensus and encourage others to action. Therefore, inspirational motivation

correlates to the dynamics noted in Latino leadership literature.

Relationship of Acculturation and Leadership

The correlational results indicate that there is a significant relationship between acculturation and leadership. Specifically, the findings indicated that Latino Orientation correlates with more MLQ leadership behaviors than did Anglo Orientation. Therefore, Latino identity impacts more aspects of leadership behavior than does Anglo identity. The results seem to indicate that Latino culture is important to the leaders' views of themselves. In addition, the results suggest that Latino Orientation tells more about Latina leadership style than Anglo Orientation. Therein, Anglo Orientation does not tell us much about Latina leadership style, but Latino Orientation tells us more about the leadership style of Latinas. Particularly, the results indicate that acculturation, the process of adapting to a new culture, is believed to be a source of contribution to leadership behaviors (Stonequist, 1961). The specific relationship between acculturation and leadership behaviors will be discussed with the results of canonical analysis.

The current lack of literature on the relationship between acculturation and leadership places this study in a unique perspective to establish new ground based on its empirical findings. Separate literature on acculturation and on leadership provides some explanations. Berry (1980) suggests that ethnic groups "do not lightly give up valued features of their cultures" (p.11). Padilla and Ruiz (1973) found that individuals choose an identity during the course of acculturation that indicates personal preferences toward either the dominant or non-dominant group. Stonequist

(1961) noted that individuals who chose their own culture identified with certain values and attributes of their traditional ethnic culture. The preference of ethnic over toward the native-oriented pole does not suggest that acculturation has not occurred but that individual preference towards own-identity has occurred (Berry, 1980). Moreover, Gordon (1978) suggested that individuals can conceivably acculturate into the host culture without leaving their own culture behind (Dolan & Figueroa Deck, 1994; Sandoval & De La Roza, 1986; Sotomayor, 1991; Spradley, 1972).

Buriel, Pérez, De Ment, Chávez, & Morán (1998) indicated that a return to traditional culture was found in Mexican Americans as they returned to the barrio, spoke Spanish, or maintained pride in Latino identity centered in Latino cultural values (Brice, 2001; E. García, 2001). In comparison to other ethnic groups, Padilla (1980) posits that despite the longstanding residence of people of Latino/Hispanic origin in the U.S., Latinos seem to maintain their cultural heritage.

Research has shown that individuals' cultural values and behaviors are contributors of performance (House et al., 2004). Acculturation "constitutes one of the most important individual difference variables in the study of ethnic minority populations" (Zane & Mak, 2003, p.39). More specifically, "psychologically, acculturation reflects the extent to which individuals learn the values, behaviors, life-styles, and language of the host culture" (p. 39). Regardless of acculturation, behaviors are reflected by the individuals' ways of thinking, doing things, and communicating thoughts. Nevertheless, leadership as an individual action, and is part of the human condition of "self." This human condition of "self" is determined by the

individuals' experiences in relation to operation of culture (e.g., human consciousness and its products) (Morris, 1994). It is in this nature (e.g., natural values and attitudes that reflect the real self) (Maslow, 1968) that individual cultural identification relate to leadership behaviors.

Multi-factor Leadership Theory, as proposed by Bass and Avolio (1997), suggest that the concepts of transformational and transactional leadership are applicable measurements that relate to acculturation. For example, as suggested by Bass and Avolio (2004), "collectivist cultures provide leaders with ready-made opportunities to become transformational leaders." (p. 12) Furthermore, traditional Latino cultural values such as *familism* (which assumes individual behavior to be heightened attention to the nuclear family and extended family, and to include friends of the family) and *colectivismo* (collectivism behavior among members provide the characteristics toward interdependence within Latino communities along with ethnic loyalty) explain Latino culture and collectivism behaviors in leadership of Latinas in this study.

Leaders' behaviors differ widely across countries (Dorfman & House, 2004; Hofstede, 2001; House et al., 2004). Attributes and entities differentiate leaders by specific culture because "societal cultural norms of shared values and practices affect leaders' behavior" (House et al, 2004, p. 17). Consequently, "leadership behavior and management practices are likely to reflect behavior patterns favored in that culture" (p. 17), which seems to suggest that culture influences leadership behaviors and outcomes (e.g., job satisfaction, motivation, performance, general welfare).

Relationship of Acculturation and Individualism/Collectivism

The correlational results indicate that there is a significant relationship between Latina Orientation and collectivism, which concurs with the literature (Bonilla-Santiago, 1992; Bordas, 2001; M. Gómez et al., 2001; Gorena, 1996; C. Rodríguez, 2000; Rosaldo & Flores, 1997). The specific relationship between acculturation and individualism/collectivism will be discussed with the results of canonical analysis.

Triandis (1995) stated, "individualism may take different forms," such as emphasizing self-reliance, competition, hedonism, or emotional distance from in-groups, while collectivism emphasizes interdependence, sociability, and family integrity (p. 61). Culture-specific I-C in terms of beliefs, attitudes, and values are incorporated by society's norms. In this way, societies become vertical and horizontal within the I-C dimensions (Triandis, 1994). For example, in acculturation, individuals choose to be either individualist or collectivist in intergroup relations. "In collectivist acculturation the whole group changes and achieves a specific status in another culture" whereas "in individual acculturation only individuals achieve the higher status" (Triandis, 1995, p. 121), reflective of our society (e.g., vertical and horizontal I-C). Therefore, in acculturation, aspects of individualism/collectivism are seen as behaviors that may influence leadership behavior (e.g. performance, outcome) because of the way the individual interacts with others.

The relationship of Latino identity and collectivism refers to how culture defines the human (Horigan, 1988). Latinos "tend to be more collectivists than are mainstream Americans, who tend to be more individualistic" (Bass, 1990, p. 753). For Latinos, values, customs, and characteristics are intertwined with culture that construes the individual 'self.' Latino culture subscribes to collectivist behaviors (Triandis, 1995), in which patterns of beliefs, attitudes, self-definitions, norms, and values will be organized. For Latinos, collectivism describes 'self' in relation with others, thus 'self' is not separate from the group, which may influence leadership behavior and outcome.

For example, collectivist behaviors, wherein individuals construe the self in relation to others, are more representative of interdependent Latino culture (Tropp et al., 1999). In this way, it is not surprising to see that the empirical findings of this study show that the acculturation of Latino oriented individuals was towards collectivism instead of individualism. Particularly, Latino studies point to the relationship between culture and identity for Latinos, specifically the connection of the collectivism nature with performance (Triandis, Marín, Lisansky et al., 1984). Subsequently, I-C are relevant to acculturation, as acculturation is relevant to self-identity. This finding suggests a reciprocal relationship between acculturation and I-C in terms of behavior and outcome, as manifestations of giving and taking (i.e., mingled and merged) between cultures influenced by individual characteristics (Herskovits, 1958).

Relationship of Individualism/Collectivism and Self-Perceived Leadership Style

The correlational results indicate that there are significant relationships between individualism/collectivism and leadership. Specifically, the findings indicate that collectivism correlates with more aspects of leadership behaviors, than does individualism. The results suggest that Collectivist Orientation is more a predictor of the Latino leadership style than Individualist Orientation. The specific relationship between I-C and leadership behaviors will be discussed with the results of canonical analysis.

Avolio and Bass (2004) establish that "collectivist cultures provide leaders with ready-made opportunities to become transformational leaders" (p. 12). Specifically, transformational leadership behaviors are related to leadership effectiveness. Walumbwa and Lawler (2003) found that transformational leadership was related to efficacy. Jung and Sosik (2002) found that transformational leadership was related to empowerment, group cohesiveness, and group effectiveness.

In collectivist cultures, interdependence is a principle generated by values and norms that transcends individual needs in favor of the moral obligation for others (Singelis et al., 1995; Triandis, 1995). Subsequently, leaders in collectivist cultures "have a moral responsibility to take care of their followers, to help them in their career plans, to attend their birthday parties, funeral ceremonies, and to counsel followers about personal problems" (Avolio & Bass, 2004, p. 12). According to MLQ, these characteristics are embedded in the transformational leader's attributes of individualized consideration.

In transformational leadership, values of a collectivist nature are emphasized. For example, transformational leaders stress human development, trust, individualized consideration, and authenticity (i.e., be true to self and others) (Bass, 1997). For Latinas, self-perception of their leadership style is transformational, which is identified as a highly effective leadership behavior that evokes efficiency, job satisfaction, and organizational commitment (Avolio and Bass, 2004). Specifically, the relationship of transformational leadership to collectivism is noted in MLQ theory and research. Jung and Avolio (1999) noted that transformational leaders are more pervasive in collectivist societies than in individualist societies.

For the collectivist, self is defined in relation to others, whereas for the individualist, self is defined as autonomous (Triandis, 1995). The disposition of the collectivist towards others directs orientations towards the good of the group (e.g. emphasis on relationships, promoting harmony, influencing the group into action). Patterns of collective behaviors tend to maximize transformation of followers that subsequently impacts their performance and their outcomes. These tendencies are generated by the personal traits that correlate to I-C attributes of self-identity and culture, which compatible with cognitive, social, and emotional intelligence of the leader.

For Latinas, leadership is collective, and therefore, transformational. Collectivist behaviors contribute to the predisposition of transformational leadership style as exhibited in the sample of Latina officers in the U.S. Army. Transformational leadership, in general, is reciprocal of collectivist culture, and in particular, of Latino culture (Shkodriani & Gibbons, 1995).

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The relationship of I-C and leadership reflects upon leaders' identity and perception, which authenticates leadership behaviors related to a myriad of multiple intelligences (Bass, 1999). Through aspects of personality, including abilities, aptitudes, as well as cognitive (e.g., verbal, spatial, numerical skills), social (e.g., interpersonal skills, sociability), and emotional (e.g., conscientiousness, caring) intelligence, leaders form the basis for their leadership style, which is reciprocal of their identity and culture (e.g., vertical and horizontal I-C). For Latinas, their identity was Latina and their cultural orientation was both vertical and horizontal collectivist. These findings suggest that Latina leadership encompasses multiple layers of Latino cultural values and norms (as mentioned in the Chapter II), which relates to transformational leadership behaviors.

Discussion of the Results of Canonical Analysis

The results of the canonical analysis indicate that there are two dimensions that relate self-perceived leadership styles to acculturation and individualism/collectivism for Latinas in the U.S. Army. The dimensions were labeled according to the loadings of leadership and acculturation and I-C variables. Specifically, the first dimension was labeled *Latina collectivist orientation and active transformational leadership style*; and the second dimension was labeled *Marginalized individualistic orientation and passive transactional leadership style.*

The findings indicate that leadership is related to the cultural identification of the individual. Thus, individuals of different cultures, depending on their cultural orientation (e.g., acculturation orientation towards individual culture vs. dominant culture), and identity with their culture/ethnicity, reflect leadership behaviors reflective of their cultural values, particularly for Latina officers in the military. In this section, I provide the following: (1) dimensions that relate self-perceived leadership styles to acculturation and individualism/collectivism for Latinas in the U.S. Army; (2) Latina collectivist orientation and active transformational leadership style; (3) Marginalized individualistic orientation and passive transactional leadership style; and (4) discussion of additional analyzes.

Dimensions that Relate Self-Perceived Leadership Styles to Acculturation and

Individualism/Collectivism for Latinas in the U.S. Army

The results of the canonical analysis indicate that there are two dimensions that

relate self-perceived leadership styles to acculturation and individualism/collectivism for

Latinas in the U.S. Army. These two dimensions came from the root factors associated

with the data extracted from the participants. The dimensions were labeled according to

the findings. Specifically, the first dimension was labeled *Latina collectivist orientation*

and active transformational leadership style; and the second dimension was labeled

Marginalized individualistic orientation and passive transactional leadership style, which

is discussed further on in this section. Figure 5.2 shows the two dimensions found in this

study. The data indicate the above characteristics of leaders based on the three survey

instruments for acculturation, individualism/collectivism, and leadership.

Figure 5.2

Leadership and Acculturation Dimensions

Latina Collectivist and Active Transformational Leadership	Marginalized Individualistic and Passive Transactional Leadership
• Latino Orientation • Horizontal and Vertical Collectivism • Idealized Influence (Behavior) • Inspirational Motivation • Contingent Reward • Individualized Consideration • Intellectual Stimulation • Idealized Influence (Attributed) • Laissez-Faire Leadership • Management-by-Exception (Active)	• Anglo Marginality, Latino Marginality, and Latino/Hispanic American Marginality • Horizontal and Vertical Individualism • Laissez-Faire Leadership • Intellectual Stimulation • Management-by-Exception (Active) • Management-by-Exception (Passive)

Latina Collectivist Orientation and Active Transformational Leadership Style

Latinas in the U.S. Army are pursuing and performing identity styles and cultural adaptations, hence interacting both with the mainstream culture and with co-ethnic cultures in the U.S. and the World (Suárez-Orozco & Páez, 2002). Because culture lies at the heart of what it means to be a Latino/Hispanic, culture taps into the guiding principles that mechanically guide individual behaviors (Abalos, 1998; Angel & Guarnaccia, 1989; Cuéllar, 2000). Specifically, characterizations of culture influence human perceptions, emotions, attitudes, and behaviors (Geertz, 1973). In this section, I provide a discussion of the findings of the Latina collectivist orientation and active transformational leadership style dimension.

The canonical results suggest that Latino orientation explains much about Latina leaders' perception of their leadership behavior. The Latino orientation refers to characterizations of culture that influence perceptions, emotions, attitudes, and behaviors reflecting Latino/Hispanic culture orientation. In this orientation, Latino culture is seen as the axis that provides the psychological and cognitive set of values, and norms that differentiates leadership behavior. Through Latino orientation, the empirical data seems to suggest that a fundamental identity is formed, creating a self-definition of psyche as Latino/Hispanic. This finding, in turn reflects feelings and behaviors within one's sense of self, consistent with Latino culture (Silvestrini, 1997; Suárez-Orozco & Páez, 2002).

Culture influences emotions and self-concept and therefore, emotions and feelings are intertwined with cognition and behavior, driven by one's culture

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(Rosaldo & Flores, 1997). In Latino societies, cultural influences on emotions and self-concept are driven by attributes of collectivism. Interdependence is valued over independence. The self is constructed as a collectivist behavior that is viewed as an emotional response. Nevertheless, identity is affected by acculturation (Cuéllar, 2000; Cuéllar & González, 2000; Rhee, Uleman, Lee, & Román, 1995). Through acculturation, individuals orient themselves to what feels comfortable. Therein, subjective (e.g., public) and objective (e.g. private) self-identity are results of two cultures coming together. Moreover, Hofstede (2002) suggests that cultures vary in terms of individualism/collectivism orientation. Hofstede's country level study on I-C posits that there is a relationship between acculturation and I-C orientations. This is also confirmed by Osyerman, Coon, & Kemmelmeier's (2002) meta-analyses research considering individualism and collectivism both cross-nationally and within the U.S., which indicates that there are differences between cultures, specifically regarding self-concept, well-being, cognition, and relationality. In their study, Osyerman et al. found that these differences are related to I-C orientation based on culture.

Additionally, Triandis (1994) indicates that cultures vary in terms of dimensions, such as collectivist vs. individualistic cultural identification. Therefore, it is not surprising to see that Latino orientation tends towards collectivist behaviors. Individuals in the Latino orientation dimension retain their former culture amidst U.S. culture. Latino ethnic identity seems to suggest that individual behavior and performance orientation is linked to self-identity (Santiago-Rivera et al., 2002;

Spring, 2001). A transformational leadership style is capitalized on cultural values of collectivism (Avolio & Bass, 1995). Latino cultural values such as the extended family, interdependence, cooperation, respect, and individualized consideration (Cuéllar, 2000) seem to be pillars of transformational leadership behaviors based on the empirical data of this research.

Although Latinos may have common cultural aspects, they may differ significantly in social, economic, cultural histories and experiences (Raajpoot, 2000; Rhee et al., 1995; Romero, 2000). However, in this sample, Latinas are military officers of diverse racial and Latino cultural sub-groups with both civilian and military education, stable economic status, differentiated levels of generational status and geographical locations. This finding suggests that cultural orientation relates more to self-identity concept than to their demographic differences.

Because culture influences the individual at the basic level of self-construal, cultural values may inform us concerning the application of behaviors to the understanding of Latino leadership styles (Triandis, 1996). The constructs of self, related to Latino orientation, are defined and re-defined through the process of acculturation (i.e.., give and take between two cultures). In this way, individuals of Latino orientation manifest their acculturation orientation through cultural preference (e.g., Latino vs. Anglo) in accordance with ARSMA II rating orientation scale (Cabassa, 2003; Cuéllar et al., 1995).

Romero (2000) established that

> "The collectivist culture is more representative of Latino culture, and
> construes the self as more interdependent with other important people within
> one's social realm. Social roles are highly important and are central identities
> of self." (p. 215)

The use of social roles is consistent with the collectivist nature of Latino culture. Values of *respeto* (respect), and *dignidad* (dignity) focus on the importance of relationships and connectedness between individuals (E. García, 2001; Molina & Aguirre-Molina, 1994; Zambrana, 1987). Social interactions are guided by values such as *personalismo* (e.g., establishment of trust and rapport through the development of warm friendly relationships) in which interactions are expected to be considerate and individualized (Romero, 2000).

More specifically, the collectivist nature of Latino culture is demonstrated through the concept of *familia* (i.e., family) that stresses interdependent obligation and highly valued connectedness to one another. *Familia* includes not only family members, but friends of the family, or others who are considered close to individuals, and are therefore, inter-related (e.g., co-workers, supervisors, team) (M. García & Lega, 1979; Gracia, 2000). These cultural values and cultural selves describe "the individual's social construction of their world and their degree of identification with their culture of origin," specifically with Latino orientation. This is consistent with the canonical results of leadership behaviors as transformational in nature.

Cuéllar, Arnold, and Maldonado (1995), for example, posit that acculturation measurements provide us with an assessment of the acculturation processes, by measuring the cultural orientation toward the Latino/Hispanic culture and the Anglo culture. In this orientation, individuals self-identify their dispositions towards these two cultures based upon their acculturation. The outcome of Latino orientation seems to suggest that there are collectivist attributes associated with the Latino culture. Furthermore, individual levels of functioning, including behavioral, affective, and cognitive (Cuéllar et al, 1995), seem to reflect Latino cultural values and identity, as expressed in leadership behaviors.

Transformational leadership behaviors within this dimension seem to suggest that Latino oriented individuals are active transformational (see Figure 5.2). As suggested by Bass (1995; 1999), active transformational leadership is employed when the individual chooses leadership behaviors designed to raise followers' consciousness about goals and values. *Idealized Influence* (Behavior) and *Inspirational Motivation* emphasize motivating followers into *semper plus ultra* (e.g., to go beyond personal or individual interests for the good of the group) (Burns, 1978). This is consistent with the findings of my study, which suggest that the four components of transformational leadership are related to active leadership behaviors of Latina officers. More specifically, idealized influence is charismatic, and seeks to inspire followers into action. Inspirational and motivational seem to be linked together by contingent reward, which reflects a military paradigm of leadership (Bass, 1996).

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Contingent Reward, although transactional, seems to suggest a leadership behavior associated with motivating others to achieve higher levels of development and performance. Therein, as the leader assigns or gets agreements on what needs to be done, the leader sets rewards for the exchange of these transactions (e.g., awards, medals, respect, team recognition) (Bass, 1996). Additionally, *Contingent Reward* seems to suggest a correlation with active transformational style. Specifically, military leadership uses contingent reward (e.g., awards ceremonies, promotions, soldier of the year, etc) as transformational tools to increase motivation and charisma among soldiers. Therefore, it is not surprising to view contingent reward within the transformational realm of Latinas. Additionally, Latino culture exhibits patterns of contingent reward behaviors. For example, Latino culture has a tendency to be generous and be self-giving, seeking ways to formulate transactions or exchanges for the good of the collective group (interdependence). The tendency towards *generosidad* (generosity) is a characteristic of collectivist cultures (Triandis, 1995).

Idealized Consideration is attained when leaders pay special attention to each individual's needs for achievement, development, and growth (Bass, 1995, 1996). In the military, leaders are expected to act as mentors and coaches to ensure that followers achieve their highest potential (Department of the Army, 1990b). In Latino culture, individualized consideration is reflective of the collective culture (Darwish & Huber, 2003; Hurtado & Gurin, 1987). Latinos have a tendency to be very considerate of others (Abalos, 1998; Ho, 1987; Zambrana, 1995).

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Intellectual Stimulation is conducted when leaders stimulate their followers'

efforts to be innovative and creative, without criticisms, and encourage new ways of

approaching problems and finding solutions. In this way, followers feel stimulated

intellectually and empowered into differing from the leader's ideas, while still

contributing to mission effectiveness (Bass, 1996). In the military, soldiers are taught

to "think outside the box," therefore leaders challenge followers to be creative in their

thinking. Intellectual stimulation thus adds to leadership behaviors within the aspects

of performance, by concentrating in the development of the followers.

Similarly, Latino culture exhibits cultural values of *cooperación*

(cooperation), that place emphasis on expanding unity of effort by creating a

collective environment of collaboration in which individuals are expected to use their

competencies for the good of the group. Latino culture calls this action "*ayudándose*

el uno al otro" (helping one and another), which serves as a source for intellectual

stimulation between all members of the group. For example, in learning, Latino

students have a tendency to collaborate to help each other learn, pass a test, or

graduate (Arredondo, 1991). This is also similar for the military culture that spouses

collaboration, calling it "*collaborate and graduate*" (Command General Staff

College, 2002).

Idealized Influence (Attributed) is established when the leader exhibits

behaviors which energize subordinates to follow, while building identification with

the leader and the articulated vision (Avolio & Bass, 2004). However, this type of

leadership behavior is attributed (e.g., credited) to the leader's position. In the

military, leaders are arranged by grade/rank (e.g., hierarchy), therein, *Idealized Influence* as an attributed behavior is expected. Similarly, Latino culture espouses a hierarchy specifically related to family and individual members' responsibilities (E. García, 2001).

The behaviors of leaders within *Laissez-Faire* and *Management-by-Exception* (Active) seem to relate to transactional attributes of disciplines that reinforce transformational leadership goals. Through Laissez-Faire, avoidance of leadership and non-transaction, leaders seem to perform towards a transactional effort to create action in followers. Interactions among leaders and followers are based on reaction towards problems, or upon decision-making that may reflect the need for group consensus.

Similarly, *Management-by-Exception* (Active) focuses on monitoring "on-the-spot-correction," execution of tasks, solution of problems, and maintenance of current performance (Avolio & Bass, 2004). Through these two levels of behaviors, certain transactions are used to make corrections, establish discipline, and monitor performance, as well as to evaluate performance. Thus, leaders actively monitor any mistakes, deviances from standards, inaccuracies, or possible future weaknesses (Bass, 1996). In the military, assessment of followers through evaluation of performance, both written and verbal, is part of the leadership development process (Department of the Army, 1990b; Fiedler & Chemers, 1974). More specifically, leaders are expected to vigilantly manage and see if followers are acting on the behalf of the mission or on their own behalf. In this way, military leaders can assess

potential weaknesses and strengths of their personnel, the mission, and the situation at large. In a similar way, Latino culture embraces active transactional behaviors for transformational purposes. Bonilla-Santiago (1992), for example, found that Latina leaders felt that they were leaders *because* of the group, and they used passive-aggressive and assertiveness skills to understand followers' participation and develop their skills, as they saw fit. Additionally, Bordas (2001) posited that Latinas have a tendency to lead by nurturing, pointing out deficiencies, with respect and dignity.

Furthermore, Latino scholars suggested that Latinas' leadership style is centered in caring for others, and ensuring that others are empowered (e.g., taking part in decision making (Y. Garza, 1996; M. Gómez & Fassinger, 1994; Gorena, 1996). Thus, Latinas in the military may adopt similar patterns by adapting leadership behaviors from transactions to use them as transformational (Cintrón, 2003; M. J. Gómez, 1996).

Marginalized Individualistic Orientation and Passive Transactional Leadership Style

The second root showed that there is a correlation between marginalized orientation and individualism with passive transactional leadership behaviors. Cuéllar et al. (1995) established that the ARSMA II marginality scale reflect the difficulty of individuals accepting Anglo, Latino/Hispanic, and Latino/Hispanic Americans ideas, beliefs, customs, and values (i.e., representations of that culture). Therefore, as expected, individuals having difficulties accepting ideas, beliefs, customs, values or individuals from other ethnic groups as friends, and do not identity with that culture or sub-cultural ethnic group, respectively. Such individuals are said to be marginalized.

The term marginalization was first proposed by Park (1930) and Stonequist (1937) to explain the psychological state of an individual in conflict of cultures. Through the process of acculturation, marginalized individuals find themselves neither identifying with a group nor feeling part of a group (Cuéllar et al., 1995). In this marginal state, individuals experience cultural conflict, and are thus in a transitional state (Stonequist, 1937). Stonequist established that three marginalization periods exist: (1) unawareness of cultural conflict experience; (2) awareness of cultural conflict experience; and (3) adaptive or maladaptive cultural conflict experience, which triggers feelings of marginalization between competing cultures.

Cuéllar (2000) posited that

> "Marginalization is a mode of acculturation in which the immigrant or
> minority-group member does not maintain allegiance to traditional beliefs,
> values, behaviors, and so, while not adopting the values of the host culture.
> This person is truly marginalized as he or she does not have a good or strong
> sense of identity with either traditional culture or with mainstream culture."
> (p. 51)

Acculturative struggles and significant acculturation difficulties, particularly psychological stress related to cultural conflict, identifies marginal acculturation orientation in individuals. In this study, marginalized orientation refers to individuals who do not identify with either culture (e.g., Anglo, Latino/Hispanic or Latino/Hispanic American). Empirical findings correlate marginalized orientation with individualization (e.g., both vertical and horizontal dimensions) with passive transactional leadership behaviors. These findings suggest that marginalized individual prefer individualistic behaviors that relate to transactional behaviors of leadership within a passive realm.

As a domain of psychological functioning, individuals choose to socialize and affiliate, and therein acculturate. Therefore, patterns of acculturation will vary from individual to individual (Zane & Mak, 2003), which differentiates them in acculturation orientation. Individuals choosing marginalized orientation are faced with alienation (Geertz, 1973; Gurméndez, 1967; Portes & Rumbaut, 1996). Through alienation, as explained by Gurméndez (1967), individuals define themselves by

separating themselves from the group, therein creating intra-relations, or de-socializing. Gurméndez posits that the marginal person chooses to become individualistic because it provides a concrete psychological indifference through an objective alienation. As a product of objective alienation, the marginal individual chooses to be passive. This passivity is a reflection of an individualistic dimension of being, centered in self-absorbance (Cuéllar et al., 1980; Gurméndez, 1967; A. Padilla, 1980). In this way, marginal oriented individuals make sense of their reality and their existence while separating from conflicting cultures.

Latino and Anglo cultures, as a whole, point towards differentiated cultural differences rather than similarities (Bass, 1990; Cuéllar et al., 1995; Triandis, 1995). Because of the cultural-specific dissimilarities, marginal oriented individuals choose not to assimilate but rather to remain in a culturally conflicted state (Berry, 2003). As posited by Santisteban and Mitrani (2003), "marginalization refers to lack of identification with any culture" (p. 123), which further supports individualistic tendencies as an effect of this state.

Individualism correlates with passive transactional leadership behaviors. These transactional behaviors demonstrate a passive approach to leadership styles. *Laissez-Faire leadership* emphasizes the exchange that takes place as a passive avoidance style (Bass, 1999). However, transactional leadership seems to be influenced by *Intellectual Stimulation*. Although transformational, *Intellectual Stimulation*, in the marginalized orientation dimension, refers to addressing problems and finding solutions using transactional behaviors of *Management-by-Exception.*

This in turn, is a corrective transaction related to ineffective and inactive leadership (Bass, 1996).

Mirsa (2003) posits that cultures emerge to be meaning systems that define, inform, and constitute a range of an individual's understanding and intelligibility. Marginal individuals are in culture conflict, in a unique human experience that acts as a constraint to the individual's meaning. In this way, marginalized individuals relate to individualistic approaches in terms of their own consciousness and functional relation to others. Consequently, the tendencies of passive transactional leadership behaviors projects an image which is invoked by the individual's marginalized ideology (e.g., alienation, resistance) and is reinforced by society's pressures and organizational standards. Nevertheless, the effectiveness of marginalized leaders is centered in the leadership transactions within themselves and their subordinates. More specifically, their relation of self-identity, acculturation, individualism, and leadership style are then the center of gravity of their leadership success.

If an individual does not understand herself, especially in cultural conflict, how could this individual effectively lead or manage others? The findings of this research point out three factors associated with leadership behaviors and outcomes that are reflected in the acculturation and individualism behaviors seen in marginal individuals (as listed above). Through understanding these factors, we can understand the strengths, weaknesses, challenges, and opportunities of marginalized oriented leaders, as suggested by the empirical findings of this research.

Discussion of Additional Analyses

The correlational analyses of date of birth, number of children, highest educational level, highest military education level, rank/pay grade status, and generational status show the following:

Date of birth data. The data indicated that the older the leader was, the more the perception of their leadership was active transformational behaviors [Idealized Influence (Attributed), Idealized Influence (Behavior), Inspirational Motivation, Individualized Consideration, and Management by Exception (Passive)]. Also, the data indicated that the older the person was, the higher the relationship was with marginalized acculturation with leadership outcomes of Extra Effort and Effectiveness. Specifically, age (date of birth) showed a complex set of relationship with the variables studied. Older Latina officers perceived their leadership style to be more transformational and having leadership outcomes of Extra Effort and Effectiveness. On the other hand, the older Latina officers identified with more passive leadership behavior and marginalization orientation. It is not clear why age would have mixed relationships.

Number of children. The data indicated that Latinas with children tend to have the following leadership behaviors: Inspirational Motivation, Individualized Consideration, and Management-by-Exception (Passive) with Extra Effort and Satisfaction. In terms of acculturation, Latinas with children tend to exhibit Vertical Collectivism. The data seems to suggest that Latinas with children perceived

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themselves as collectivists with transformational leadership behaviors of motivation and consideration with passive transactional behaviors.

Highest civilian educational level. The data seem to indicate that the higher the education level of the leader, the more the leaders perceived themselves within the marginality acculturation orientation with transformational (active) and transactional (passive) leadership behaviors [Idealized Influence (Attributed), Inspirational Motivation, Individualized Consideration, and Management-by-Exception (Passive)] which related to leadership outcomes of Extra Effort and Effectiveness.

Highest military education level. The findings suggested that the higher the military education, the more the leaders perceived their leadership styles as transformational [Idealized Influence (Attributed), Idealized Influence (Behavior), Inspirational Motivation, Intellectual Stimulation, Individualized Consideration, and Laissez-Faire Leadership with leadership outcomes of Extra Effort and Effectiveness]. However, the findings show no relationship with acculturation. This finding seems to suggest that the more military education the leader had, the more likely the leader was to identify herself as having attributes of effective leadership as defined by Bass and Avolio (Bass & Avolio, 1999).

Rank/Pay grade status. Rank/pay grade reflected a relationship with transformational leadership behaviors (Inspirational Motivation, Individualized Consideration) and leadership outcomes (Extra Effort and Effectiveness). This finding seems to suggest that rank/pay grade factors in to leadership behaviors of motivation and consideration, resulting in leadership outcomes for effectiveness.

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Generational status. The data indicated that generational status is a factor in leadership behaviors of Inspirational Motivation and Management-by-Exception (Passive) with acculturation Anglo Orientation and Latino Orientation. In acculturation, the data suggested that individuals at the lowest generational status perceived their acculturation to be towards the marginality orientation. Additionally, the leader perceived their style to be oriented towards Vertical Individualism. These results indicated that acculturation is significantly related to generational status. This finding is consistent with the literature and other studies, and therefore, it is not surprising to see that acculturation and generational status are related. Cuéllar et al. (1995) found that Mexican Americans generational status correlated to generational status towards to Anglo culture. Specifically, Cuéllar et al. show that the lowest levels of generational status (e.g., 1st generation born in a Hispanic/Latino country or Spanish-speaking country) correlated with the least acculturation to Anglo culture.

Currently, there are no other studies that support, disprove, and/or compare these findings. Therefore, additional research is required to generalize and explain the findings of this study.

Implications of Findings

What are the implications of Latino women's' leadership, acculturation and individualism/collectivism styles in the U.S. Army? As military officers, by virtue of their military grade (i.e. rank), Latino women leaders make a difference and contribute to the U.S. Army's overall organizational success. However, their contributions are not only based on their rank/pay grade but also on their capacity to effectively and efficiently lead and manage the duties and responsibilities bestowed upon them. Therefore, their volunteer participation in both today's and tomorrow's U.S. Army is significant.

Based on the findings of this exploratory research study, there two main implications specifically related to the organizations' success.

First, military leadership needs to recognize the value of and help Latina leaders appreciate and use their culture, particularly because Latino orientated leadership is associated with effective leadership styles that will in turn help leaders perform better at two-levels: (1) the individual, and (2) the organization.

At the individual level, the organization recognizes the importance of culture within the aspects of individual identity, which is crucial for acculturation processes between Latino and Anglo cultures. Individual identity, despite the acculturation orientation of the individual, is key to the individual's behaviors regarding both leadership and acculturation, to include individualism/collectivism dimensions. For example, for Latinos, culture, as well as language abilities and preference, is part of

the cultural identity framework (Dana, 2000) which helps to identify leadership behaviors.

At the organizational level, organizations help individuals appreciate themselves in terms of their cultural identity. Cross-cultural knowledge is fundamental for the understanding of people (Ogbu & Matute-Bianchi, 1986). Therein, by understanding Latino/Hispanic cultural perspectives, ideologies, and behaviors, as well as cultural norms and traditions, the organization enriches and empowers its personnel to become their best by learning to appreciate their culture and self-identity.

Since culture is an antecedent to behavior and personality (Cuéllar, 2000); its role is critical in human behavior. Specifically, military leadership cannot be color-blind and assume that U.S. Army leaders are all "green." The term "*green*" is used as an expression to illustrate color-blindness based on uniform color. Through the group-think of "*we are all green*," leadership attributes from other cultures are not valued, and are therefore unappreciated.

Neville et al. (2000) indicate that color-blind racial attitudes are manifested when race and culture are ignored, generating unwillingness to view the differences in attributes, contributions, behaviors, and characteristics of a variety of ethnic backgrounds. For example, color-blind organizations emphasize "sameness," specifically color-evasion (Frankenberg, 1993). Despite the fact that the U.S. Army is effective in their efforts to emphasize in diversity and equal opportunity as well as equal pay across genders, it also capitalizes in sameness and being one, which may

lead to characterizing individuals as "being all green," despite their racial and cultural diversity. I use the term color-blind to define a specific organizational challenge for all organizations, including the U.S. Army. Therefore, I am not excluding the U.S. Army from this cross-cultural organizational challenge.

Second, military leadership needs to identify and help marginalized oriented individuals. Based on the findings of this research, marginalized oriented individuals are associated with negative leadership behaviors. Therefore, by identifying individuals of marginalized orientations, the organization can help to assist them individuals in two areas: (1) becoming less marginalized and (2) becoming better officers.

In decreasing marginalization, the organization secures an active role for diversity in a measurable and accountable way. It provides a nurturing ground for self-development in terms of self-identity and the acculturation process, with which the individual feels conflict. For example, the organization could create intervention policies and programs that are tasked to provide soldiers with assistance with acculturation, language and cultural differences. Particularly helpful would be self-scored questionnaires and instruments that provide confidentiality but assist the Latina officer in identifying their acculturation orientation and then create a plan of supportive training.

Towards producing excellent officers, the organization should seek to advise and assist these officers to understand their leadership behaviors and outcomes, in relation to their acculturation and individualism/collectivism styles. For example, the

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organization can provide additional leadership development training designed for marginalized individuals, which will provide both further understanding of the cultural conflicts of these individuals, as well as strategies with which to overcome their challenges. Thus, the organization becomes a transformational leader itself, while helping its leaders become their best. Becoming the best is not singled out to the officer, but it relates to the efforts that the organization must plan, develop, and execute to ensure that all its leaders receive the proper-fit training for leadership development.

Limitations and Directions for Future Research

There are four major limitations within the current investigation. In this section, I provide a discussion of these limitations, as well as directions for future research within the scope of this study.

First, the current research was based on self-reported data. Based on this research, we only know the leaders' self-perceived leadership, acculturation, and individualism/collectivism styles; and we do not know how supervisors and followers view these leaders. This limits the empirical data since it is based on self-reported measurements, which may not reflect the officers' actual leadership style.

Therefore, future research is necessary to explore how colleagues, supervisor, followers, and acquaintances perceived the leadership, acculturation, and I-C behaviors of Latino women leaders. Expanding the scope of exploration to other informants will help in developing a framework for understanding leadership and acculturation in Latinas.

Second, this research was aimed solely at Latino women, specifically U.S. Army officers. Because I only looked at women who were highly educated and had military training, I could not compare to MLQ normative scores. The MLQ normative scores are related to both genders, and there are no current revisions as regards Latino culture available for comparison. Similar limitations in MLQ, acculturation and I-C instruments also restricted the study, because I could not compare it to other findings based on female and overall Latino culture.

Future research should address Latino men as well as Latino women, including Latino youth. Research studies should also examine a variety of organizations, including the U.S. Army and other armed forces, industry, education, business, and non-profit organizations. Moreover, additional research should be conducted on Latinos of different socio-economic backgrounds throughout the U.S. By focusing on individual differences, we can understand the relationship of acculturation and leadership at the individual's level of reality (e.g., education, socio-economic status, generational status). Additional research should target gender differences in leadership and acculturation, to include individualism/collectivism styles. By doing so, the research will expand the understanding of how Latino women and men lead.

Third, because all my data is correlational, I cannot address causality. My research was exploratory, and therefore I cannot offer additional interpretation or discussion of the findings, particularly of causation. Therefore, this research is limited by what it set to investigate.

However, intervention studies such as cultural blindness and cross-cultural differences in leadership, acculturation, and I-C on training, organizational culture and policies, and leadership development studies should be conducted to identify and explain how leadership and acculturation affects Latino leadership styles in U.S. institutions.

Fourth, although the ARSMA II was used to identify orientation of acculturation of Latina leaders, the ARSMA II is limited because it focuses on overt expressions of culture and not on covert expressions of culture. This limits the

exploration of leadership and acculturation to include individualism/collectivism. Additionally, we do not know the "what" of culture that Latina leaders bring to their leadership style, specifically the Latino values and norms that they themselves feel relate to their leadership style.

Additional research should focus on both covert and overt expressions of culture, as well as on cultural values used by leaders that relate to their leadership style. By focusing on these aspects of culture, researchers can add to the support of leadership development and organizational culture understanding of Latina leaders in all U.S. institutions. Particularly, research should identify and provide causality in the explanation of ways in which Latino women may use culture in their approach.

Finally, this research is limited by the objective it aimed to achieve; exploring the relationship of leadership and acculturation, to include individualism/collectivism. Although I used highly reliable instruments, these instruments are limited in their scope of research purpose and function. Therefore, future research should consider aiming at fabricating a new instrument that identifies all these factors as variable components. A new instrument should address leadership, acculturation, cultural values and I-C behaviors, as well as individual preference based on social status and lifestyle. This type of instrument could be used in U.S. institutions and non-U.S. institutions around the world to assist in understanding and assessing leaders for the implementation of leadership development and training, human resources policies, and diversity programming, including the recognition of culture as an asset and

strength in leadership performance. The potential for such an instrument would gear

visionary organizations to emerge as transformational institutions.

Appendices

Appendix A

Diagram of the Study

Appendix B

Request for Approval to Survey Department of the Army Personnel

Appendix C

Survey Protocol for Administering Survey Instrument

Survey Instructions

Research Survey and Request for Results Form (e.g., attached to survey)

Appendix D

 Data Collection Activities

 Sample of letters

Appendix E

Bass and Avolio's MLQ 5X Survey

Appendix F

Cuéllar et al.'s ARSMA II Survey

Appendix G

Triandis and Gelfand's Individualism-Collectivism Scale

Appendix H

Study's Demographic Questionnaire

Appendix A: Diagram of the Study

Purposes:

1. Describe self-reported leadership style of Latino women in the U.S. Army.

2. Explore if there is a relationship between leadership and acculturation.

Conceptual Context:

1. Leadership and acculturation theories/assumptions.

2. Culture and Latino culture assumptions.

3. Organization and organizational culture theory.

4. Own experience as a Latina leader in the U.S. Army (e.g., enlisted and officer).

5. Deficiency on literature on Latino/a leadership.

6. Military leadership.

7. Leadership and acculturation instrumentation.

Research Questions:

1. What are Latino women's self-perceptions of their leadership style?

2. How does acculturation relate to leadership? Specifically, what is the relationship between acculturation and Latino women's self-perceptions of their leadership style?

3. What is the influence of individualism/collectivism on the relationship between leadership and acculturation? Specifically, how do individualism and collectivism relate to Latino women's self-perceptions of their leadership style?

Methodology:

1. Quantitative, descriptive, and exploratory research approach.

2. Canonical analysis: Leadership and acculturation, including

individualism/collectivism.

3. Mail or e-mail 30-45 minutes survey:

 (a) 5-minutes Demographic Questionnaire.

 (b) Three parts survey (total 30 minutes):

   (i) 10-minutes leadership survey.

   (ii) 10-minutes acculturation survey.

   (iii) 10-minutes individualism/collectivism survey.

Validity:

1. Test reliability on each instrument for the sample.

2. Test sample bias by testing difference between early and late responders.

3. Comparison with available literature leadership theories and acculturation

assumptions.

4. Feedback from dissertation committee, ARI, and APSO.

Appendix B: Request for Approval to Survey Department of the Army Personnel

TO: US Army Research Institute Date Submitted: _____ Date Approved/Disapproved: __

ATTN: DAPE-ARI-PS
5001 Eisenhower Avenue, Alexandria, VA 22304-4841

DSN: 767-7801 Commercial: (703) 617-7801 E-mail: ARI-APSO@ari.army.mil

RECOMMENDED TITLE OF SURVEY:

NAME OF MILITARY SPONSORING ORGANIZATION OR OFFICE:

POINT OF CONTACT:

MAILING ADDRESS:

TELEPHONE: E-MAIL:

SCHEDULE:

- Survey Instrument Completion Date.

- Survey Administration Dates.

- Data Analysis Dates.

- Final Report Date.

JUSTIFICATION FOR SURVEY REQUEST:

- Describe the general purpose of the survey.

- List the specific objectives being addressed by the survey.

- Describe how the survey results will be used.

BACKGROUND RESEARCH:

Describe the planning and coordination of the survey, with a focus on what Army organizations/offices have been contacted concerning related research.

Describe the most recent relevant research, if any. Identify any publications, articles, and/or papers reviewed. Include both military and civilian sources.

TARGET POPULATION:

Describe the population on which the survey will focus.

Provide the estimated size of the target population.

SAMPLE:

Describe the rationale and procedures for selecting the survey sample (provide justification for sampling within subgroups, if proposed.)

Provide the suggested size of the final obtained sample subgroups and total and the desired sampling error. (Indicate over-sampling for anticipated non-response.)

ADMINISTRATION: Describe method of data collection, command effort required (to include administration time), and time required for a respondent to complete survey.

INSTRUMENT: Attach draft of survey instrument, Memorandum of Instruction to administrators, and Privacy Act Statement (if applicable). DATA ANALYSIS PLAN: Describe manner of data processing and statistical procedures to be used.

Appendix C: Survey Protocol for Administering Survey Instrument

1. APSO contacts Defense Personnel Manpower Data Center, and obtains a census of Latinas in the U.S. Army. Using the criteria for participation, APSO and researcher verifies participants' personal data.

2. APSO prepares and verifies mailing list containing participants' rank, name, current postal address, and AKO e-mail address for mailing purposes (e.g., confidentiality).

3. Mailing listing will be set in Excel spreadsheet and each possible participant is given a survey code number (e.g., this is to ensure confidentiality of the respondent and track non-respondents). Spreadsheet will have rank, name, address (postal and AKO e-mail), survey code number, mail date, and status of mail columns to track survey progress.

4. Survey administration: follow methodology.

5. Postal mailing design: follow methodology.

6. Mailing packets will include a demographic questionnaire, and the three part survey of leadership, acculturation, and individualism/collectivism scale with instructions, along with a self-stamped reply envelop, request for survey results form with deadline.

7. The researcher will send an introduction letter and thank you for participation along with a sponsor letter from the following: ARI, WREI, and a General Officer. Mailings are set in three stages.

Appendix D: Data Collection Activities

Element 1 – Premailing

Status

	Request for approval for access to participants: IRB and APSO.
	Obtain APSO's approval and obtain address labels for possible respondents.
	Prepare and verify letters and mailings for possible respondents.
	AKO announcement.

Element 2 – Mailings

Status

	Prenotice E-mail and Letter – an e-mail will be sent to each participant AKO e-mail account to verify addresses before mailing the survey. Corrections to addresses will be made, if participant e-mails w/ POC information. Otherwise, a prenotice mail will be sent to each possible participants, if they have not e-mailed me back their response. This prenotice letter will be sent via mail, when possible respondent cannot be reached via e-mail.
	Five Mailing Stages
	Stage I – <u>Survey mailing</u>: The first mailing stage will contain the University of Maryland cover letter with sponsors' endorsements, researcher's cover letter, copy of the survey with a return stamped and self-addressed enveloped, and request for results postcard inserted in a business-sized enveloped.
	Stage II – <u>Thank you postcard</u>: The second mailing stage is a reminder postcard, sent a week after the survey was mailed that asks for their cooperation, thanks them for their time, and offers them access to researchers information in order to obtain their copy of survey (e.g., if participant has lost the materials) as well as survey results. This second mailing will go to the participants who have not responded.
	Stage III – <u>Replacement survey</u>: The third mailing stage will be conducted after corroboration of non-respondents' mailing addresses. Non-respondents will be e-mailed (e.g., copy of the invitation to participate and checking mailing address) using the Army Knowledge On-Line (AKO) military e-mail address directory, which will serve to verify the participant's mailing address. Then, the third mailing stage will be conducted, timely after three weeks have passed from the second mailing stage. The third mailing stage will have a copy of the cover letter, a survey, a return self-stamped envelope, and an offer to participate (e.g., same as stage I).
	Stage IV- <u>Pre-final contact</u>: The fourth mailing stage is a reminder postcard, sent a week after the replacement survey was mailed that asks for their cooperation, thanks them for their time, and offers them an opportunity to request a copy of survey (e.g., if participant has lost the materials). This fourth mailing will go to the participants who have not responded.
	Stage V- <u>Final contact</u>: The fifth mailing stage is a verification of participation and replacement stage made a week after the pre-final contact reminder postcard is sent. Special contact via e-mail or phone call will be made at this time, and a last replacement will be sent.

Start collection of mailings

Status

	Collect all surveys: Verify survey code number against mailing listing. Respondents to survey are taken out of the mailing list.
	Record survey results on Excel spreadsheet.
	Mail or e-mail survey results to respondents, if survey request form is received.

Timetable of the Research

What	Date
Proposal Hearing	March 9, 2004
IRB Request for Approval	March 17, 2004
APSO Request for Approval	March 19, 2004
APSO Approval Obtained	March 26, 2004
IRB Approval Obtained	April 1, 2004
Census Data of Participants	April 5, 2004
List of Participants Mailing Addresses	April 6, 2004
AKO Verification of Addresses	April 5-7, 2004
Prenotice	April 7, 2004
Mailings (1-5th)	April 15-May 15, 2004
AKO Announcement	April 20- May 11, 2004
Data Analysis	May 17-June 18
Results to Participants	July 7-9, 2004

AKO Announcement Posting

Are you a female active duty Army officer of Latino/Hispanic heritage? The University of Maryland & the U.S. Army Research Institute ask for your participation in a survey study on the relationship of leadership and acculturation. Contact MAJ Zoppi.

Early Prenotice Letter/E-mail Option

Sample

Dear Fellow Officer,

This e-mail has been sent to you through the U.S. Army Research Institute for Behavioral and Social Sciences and the University of Maryland, College of Education. You have been selected to participate in a survey on Latino/Hispanic women leaders because you were identified as being a Latina/Hispanic female in the Army's official personnel database. If you are not a Latina/Hispanic female Army officer, please reply to this e-mail indicating that is the case so that we may take you off of our mailing list.

A few days from now you will receive in the mail a request to fill out a survey for an important study being conducted by the University of Maryland. It concerns Latino/Hispanic women officers in the U.S. Army, specifically their self-perceptions of leadership and acculturation styles.

We are writing you in advance because we have found many officers like to know ahead of time that they will be contacted. The study is an important one that will contribute to understanding how Latino/Hispanic women lead. Additionally, we would like to take this opportunity to confirm your name, rank, address, and e-mail address in order to ensure that the survey materials reach you and because these materials are costly to the student investigator, a fellow officer.

If the above listed mailing address is incorrect or you prefer that we mail you to another address, please reply to this e-mail immediately!

In order to obtain your response quickly, you could: (1) e-mail your response to MAJ Zoppi, (2) fax it to (410) 451-5949, or (3) mail it to: 2309 Westport Lane, Crofton, MD 21114. If you have any questions, feel free to contact MAJ Zoppi at (410) 451-5949 or e-mail at zoppi@wam.umd.edu or irene.zoppi@us.army.mil

Thank you for your time and consideration. It is only with the generous help of officers like you that our research can be successful.

Sincerely,

Irene M. Zoppi, Ph.D. Candidate
MAJ, MI, USAR/Student
Investigator
University of Maryland
College of Education
College Park, Maryland 20742
www.education.umd.edu
(410) 451-5949
zoppi@wam.umd.edu

Dennis M. Kivlighan, Jr., Ph.D.
Principal Investigator
University of Maryland
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College Park, Maryland 20742
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(301) 405-2863
dennisk@wam.umd.edu

Joseph Psotka, Ph.D.
U.S. Army Research
Institute
5001 Eisenhower
Avenue
Alexandria, VA
22304-4841
www.ari.army.mil
(703) 617-5572
psotka@ari.army.mil

Please know - It costs nothing to you to participate... It is your contribution to Latina leadership research!

"Research on leadership and women has expanded and developed in the last three decades, but it still does not address Latino women's approaches to leadership (Bordas, 2001; Gorena, 1993; Reza, 1995) nor examine the relationship of leadership, acculturation, and individualism/collectivism styles of Latino women leaders. Research on Latinos/as is limited and almost nonexistent (Abalos, 1998; Acosta-Belén, 1979; Burgos-Sasscer, 1990; MALDEF, 1990a, 1990b; Meier & Steward, 1991; Mirande & Enríquez, 1979; Trueba, 1999; Zambrana & Zoppi, 2002). Further, research on Latino women is restricted to larger Latino/Hispanic population subgroups (e.g., Cubans, Mexicans, and Puerto Ricans) (Portes & Rumbaut, 1996; Rein, 2001; Reza, 1995; C. Rodríguez, 2000; The World Bank, 2003; U.S. Census Bureau, 2002b; Zambrana, Dorrington, & Alonzo Bell, 1997). Thus, literature on Latino women is inadequate, particularly for Latino women in the military" (Zoppi, 2003, in progress).

Currently, there are only 650 Latina/Hispanic female Army officers (e.g., Active duty females Hispanic/Latinas in the Army: enlisted 10.5% and officers 5%, WREI, 2003), Therefore, this survey has been sent to all of you, and your participation is critical. This survey has the potential to affect the entire Hispanic community, the fastest growing ethnicity of American population. Thus, this is your opportunity to become a trailblazer, being part of this unique research in leadership research for Latino and Hispanic women.

Your address was provided by the U.S. Army Research Institute for the Behavioral and Social Sciences and authorized by the Army Personnel Survey Office IAW AR 600-46 survey of military personnel. (Survey approval authority: U.S. Army Research Institute for the Behavioral and Social Sciences, Survey Control Number: DAPE-ARI-AO-04-16, RCS: MILPC-3.) Please know that - Survey results will be provided as a token of appreciation. All surveys are coded for confidentiality

Mil gracias,

Irene

Reply Card/Contact Information Verification/Referral Information Card

---

Prenotice Postcard, 1st, 2nd, 3rd, and 4th Mailings

Irene M. Zoppi
2309 Westport Lane
Crofton, MD 21114
E-mail: zoppi@wam.umd.edu or irene.zoppi@us.army.mil
Voice/Fax: (410) 451-5949

Dear Researcher,

  ___ I am not a Latina/Hispanic Army officer on active duty. Please delete my name from your mailing list.
  ___ Yes, please send me the survey materials immediately to the following:

Address: _____

I may be reached through e-mail at the following:

E-mail address: _____

AKO e-mail address: _____

Thank you for taking the time to be part of this study and for making a difference in researching Latinas' leadership styles in the U.S. Army!

Additional Comments:

Insert/ Mailings 1 through 5 (Double sided print)

ATTENTION

It costs nothing to you to respond. Return your survey and get your leadership survey results e-mailed to you!

1st Mailing

Survey # _____

Dear Fellow Officer,

You have been selected to participate in a research survey to examine leadership experiences of Latino/Hispanic women of diverse cultural backgrounds, who are U.S. Army officers on active duty. This survey is conducted by the University of Maryland, College of Education, and sponsored by the U.S. Army Research Institute for the Behavioral and Social Sciences.

Research on Latino/Hispanic women leaders is almost non-existent. As an officer in the U.S. Army, a Latina, and a doctoral candidate, I feel that it is important to study Latina/Hispanic leadership. Therefore, I am writing you as a fellow officer to ask for your cooperation in this "trailblazer" research opportunity, specifically to study our leadership.

Results from the survey will be used to understand how Latino/Hispanic women lead, using different styles of leadership, acculturation experiences, and orientation toward individualism/collectivism. If you complete the survey, we will send you the results of your leadership style as a token of appreciation!

Your answers are completely confidential and will be released only as summaries in which no individual's answers can be identified. When you return your completed survey, your name will be deleted from our mailing list and never connected to your answers in any way. This survey is voluntary and you are under no obligation to participate in this study. However, it only takes 15-20 minutes of your time to share your self-perceptions and experiences about leadership and acculturation. If for some reason you prefer not to respond, please let us know by returning the blank survey in the enclosed stamped envelope. Additionally, if you have any questions about your rights as a research subject or wish to report a research-related injury, please contact: Institutional Review Board Office, University of Maryland, College Park, Maryland 20742, or e-mail irb@deans.umd.edu, or call (301) 405-4212.

For additional information, questions, or comments about this study, please feel free to contact MAJ Zoppi at 410-451-5949 (Voice/fax) or e-mail zoppi@wam.umd.edu or irene.zoppi@us.army.mil

Thank you for supporting this research study on Latina leadership!

Sincerely,

Irene M. Zoppi, Ph.D. Candidate
MAJ, MI, USAR
Student Investigator
College of Education
University of Maryland
College Park, Maryland 20742
www.education.umd.edu
(410) 451-5949 (voice/fax)
zoppi @wam.umd.edu

Dennis M. Kivlighan, Jr., Ph.D.
Principal Investigator
College of Education
University of Maryland
College Park, Maryland 20742
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(301) 405-2863
dennisk@wam.umd.edu

Joseph Psotka, Ph.D.
U.S. Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22304-4841
www.ari.army.mil
(703) 617-5572
psotka@ari.army.mil

P.S. We need your help in obtaining timely responses and we ask you to please return your completed survey as soon as possible. This research study is entitled: The relationship of self-perceived leadership style and acculturation of Latino women officers in the U.S. Army. Results will be available as soon as the researcher obtains all participants' responses. IRB HSR Identification Number 04-0158. Survey approval authority: U.S. Army Research Institute for the Behavioral and Social Sciences, Survey Control Number: DAPE-ARI-AO-04-16, RCS MILPC-3.

Thank You /Follow-up Postcard

2nd Mailing

UNIVERSITY OF
MARYLAND

College of Education, Office of the Dean
3119 Benjamin Building
College Park, Maryland 20742

Deadline

_____

Address of Participant, Survey # _____

Just a quick note to remind you that we are looking forward to your survey response.
If you have already returned the survey, please accept our sincere thanks. If not, please do so today.
Because the survey was sent to a limited number of Latinas in the U.S. Army, we very much need
your responses to obtain accurate and valid results.

If you did not receive the aforementioned survey, or it was misplaced, please call me at 410-451-5949
or e-mail me at irene.zoppi@us.army.mil or zoppi@wam.umd.edu

Thank you for supporting this research on Latino/Hispanic women military leaders.

Sincerely,

Irene M. Zoppi, Ph.D. Candidate	Dennis M. Kivlighan, Jr., Ph.D.	Joseph Psotka, Ph.D.
MAJ, MI, USAR	Principal Investigator	Co-Principal Investigator
Student Investigator	College of Education	U.S. Army Research Institute
College of Education	University of Maryland	5001 Eisenhower Avenue
University of Maryland	College Park, Maryland 20742	Alexandria, VA 22304-4841
College Park, Maryland 20742	www.education.umd.edu	www.ari.army.mil
www.education.umd.edu	(301) 405-2863	(703) 617-5572
(410) 451-5949	dennisk@wam.umd.edu	psotka@ari.army.mil
zoppi@wam.umd.edu		

**P.S. We need your help in obtaining timely responses, and we ask you to
please return your completed survey ASAP!**

Replacement Survey Letter

3rd Mailing
[Sent to non-respondents]

To the best of our knowledge, your survey has not yet been returned to us. Because we need your cooperation, we are sending you a replacement survey, just in case you need one.

The survey results will reflect the self-perceived leadership and acculturation styles of Latino/Hispanic women officers like you. Thus, these responses make a contribution in the field of research on Latina leadership. Particularly, we think that the results will help us understand the relationship of leadership and acculturation of Latina leaders. Thus, we need your help!

We are writing you again because of the importance that your survey has in helping to get accurate results, particularly because there are very few Latino women officers in the U.S. Army. Therefore, your response is highly significant to this research.

If you have already returned the survey, please accept our sincere thanks. If not, please do so today. Enclosed is your survey, please fill it out and return it in the enclosed stamped envelope so that we may send you the results of your leadership style.

A survey identification number is printed on the front of the survey so that we ensure confidentiality. Your answers will be released only as summaries in which no individual's answers can be identified. When you return your completed survey, your name will be deleted from our mailing list and never connected to your answers in any way. This survey is voluntary. However, you can help us very much by taking a few minutes to share your self-perceptions and experiences about leadership and acculturation.

We hope you will fill out and return the survey soon, because your response counts! If for any reason you prefer not to answer it, please let us know by returning a note or blank survey in the stamped envelope, so we can take you off our mailing list. If you have any questions, please call me at 410-451-5949 or e-mail me at irene.zoppi@us.army.mil or zoppi@wam.umd.edu

Thank you for supporting this research study on Latino/Hispanic women military leaders.

Sincerely,

Irene M. Zoppi, Ph.D. Candidate	Dennis M. Kivlighan, Jr., Ph.D.	Joseph Psotka, Ph.D.
MAJ, MI, USAR	Principal Investigator	U.S. Army Research Institute
Student Investigator	College of Education	5001 Eisenhower Avenue
College of Education	University of Maryland	Alexandria, VA 22304-4841
University of Maryland	College Park, Maryland 20742	www.ari.army.mil
College Park, Maryland 20742	www.education.umd.edu	(703) 617-5572
www.education.umd.edu	(301) 405-2863	psotka@ari.army.mil
(410) 451-5949	dennisk@wam.umd.edu	
zoppi@wam.umd.edu		

P.S. We need your help in obtaining timely responses, and we ask you to please return your completed survey by the following deadline: May 15, 2004.
Analysis of the data cannot be completed without your input, please support this study!

Last Reminder

4th Mailing

UNIVERSITY OF
MARYLAND

College of Education
Office of the Dean
3119 Benjamin Building
College Park, Maryland 20742

Deadline
_____

Address of Participant, Survey # _____

We would really like your participation!

Just a quick note to remind you that we are coming to a close in the research and we are looking forward to your survey response.

If you have already returned the survey, please accept our sincere thanks. If not, please do so today. This survey was only sent to a small number of Latinas in the U.S. Army. We very much need your survey responses to obtain accurate and valid results.

If you did not receive the aforementioned survey, or it was misplaced, please call me at 410-451-5949 or e-mail me at irene.zoppi@us.army.mil or zoppi@wam.umd.edu

Thank you for supporting this research on Latino/Hispanic women military leaders.

Sincerely,

Irene M. Zoppi, Ph.D. Candidate	Dennis M. Kivlighan, Jr., Ph.D.	Joseph Psotka, Ph.D.
MAJ, MI, USAR	Principal Investigator	U.S. Army Research Institute
Student Investigator	College of Education	5001 Eisenhower Avenue
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(410) 451-5949	dennisk@wam.umd.edu	
zoppi@wam.umd.edu		

Final Survey Letter

5th Mailing

UNIVERSITY OF
MARYLAND

College of Education
Office of the Dean
3119 Benjamin Building
College Park, Maryland 20742

Reply Deadline_____
Address of Participant, Survey # _____

During the last two months we have sent you several mailings about an important research study we are conducting about leadership and acculturation. To the best of our knowledge, it has not yet been returned.

Its purpose is to understand the self-perceived leadership and acculturation styles of Latino/Hispanic women officers like you. These responses will make a contribution in the field of research on Latina leadership. Thus, we need your help!

We are sending a final contact by priority mail because of our concern that officers who have not yet responded may have had different experiences than those who have responded. Hearing from everyone is important because it helps assure that the survey results are as accurate as possible, particularly because there are very few Latino women officers in the U.S. Army. Therefore, your response is highly significant to this research.

We also want to assure you that your response to this study is voluntary, and if you prefer not to respond, that's fine. If you are not a Latina/Hispanic officer, and you feel that we have made a mistake including you in this study, please let us know by returning the blank questionnaire with a notice indicating so. This would be very helpful and appreciated.
If you have any questions, please call me at 410-451-5949 or e-mail me at irene.zoppi@us.army.mil or zoppi@wam.umd.edu

Finally, we appreciate your willingness to consider our request as we conclude efforts to better understand leadership and acculturation styles of Latino/Hispanic women officers. Thank you very much!

Sincerely,

Irene M. Zoppi, Ph.D. Candidate	Dennis M. Kivlighan, Jr., Ph.D.	Joseph Psotka, Ph.D.
MAJ, MI, USAR	Principal Investigator	Co-Principal Investigator
Student Investigator	College of Education	U.S. Army Research Institute
College of Education	University of Maryland	5001 Eisenhower Avenue
University of Maryland	College Park, Maryland 20742	Alexandria, VA 22304-4841
College Park, Maryland 20742	www.education.umd.edu	www.ari.army.mil
www.education.umd.edu	(301) 405-2863	(703) 617-5572
(410) 451-5949	dennisk@wam.umd.edu	psotka@ari.army.mil
zoppi@wam.umd.edu		

P.S. We need your help in obtaining timely responses, and we ask you to please return your completed survey by the following deadline: _____

Survey Letter

E-Mailing (option) for 3rd and 5th Mailings

Reply Deadline_____
Address of Participant, Survey # _____

We are e-mailing you to confirm we have your correct contact information so we can mail you a survey form. Several weeks ago we sent you a survey about leadership and acculturation but, to the best of our knowledge, it has not yet been returned.

We are writing you again because of the importance that your survey has in helping to get accurate results, particularly because there are very few Latino women officers in the U.S. Army. You can help us very much by taking a few minutes to share your self-perception and experiences about leadership and acculturation. Plus, we will send you the results of the leadership survey – so you know your leadership style!

Your participation is voluntary and confidential. A survey identification number is printed on the front of the survey so that we ensure confidentiality. Your answers will be released only as summaries in which no individual's answers can be identified. When you return your completed survey, your name will be deleted from our mailing list and never connected to your answers in any way.

We hope you will fill out and return the survey soon, because your response counts! If for any reason you prefer not to answer it, please let us know by returning a note or blank survey in the stamped envelope, so we can take you off our mailing list. If you have any questions, please call me at 410-451-5949 or e-mail me at irene.zoppi@us.army.mil or zoppi@wam.umd.edu

Thank you for supporting this research study on Latino/Hispanic women military leaders.

Sincerely,

Irene M. Zoppi, Ph.D. Candidate	Dennis M. Kivlighan, Jr., Ph.D.	Joseph Psotka, Ph.D.
MAJ, MI, USAR	Principal Investigator	Co-Principal Investigator
Student Investigator	College of Education	U.S. Army Research Institute
College of Education	University of Maryland	5001 Eisenhower
University of Maryland	College Park, Maryland 20742	Avenue
College Park, Maryland 20742	www.education.umd.edu	Alexandria, VA 22304-4841
www.education.umd.edu	(301) 405-2863	www.ari.army.mil
(410) 451-5949	dennisk@wam.umd.edu	(703) 617-5572
zoppi@wam.umd.edu		psotka@ari.army.mil

Survey Results Letter

Dear Fellow Officer,

Thank you so much for participating in a research survey to examine leadership experiences of Latino/Hispanic women of diverse cultural backgrounds, who are U.S. Army officers on active duty. As a token of our appreciation, attached is your leadership survey results.

The survey was conducted by MAJ Irene M. Zoppi, Doctoral Candidate, the University of Maryland, College of Education and endorsed by the U.S. Army Research Institute for the Behavioral and Social Sciences. Research study title: <u>THE RELATIONSHIP OF SELF-PERCEIVED LEADERSHIP STYLE AND ACCULTURATION OF LATINAS IN THE U.S.ARMY.</u>

For additional information, questions, or comments about this study, please feel free to contact MAJ Zoppi at 410-451-5949 or e-mail irene.zoppi@us.army.mil or zoppi@wam.umd.edu

Thank you for supporting this research study on Latina leadership and for making a difference!

Sincerely,

Irene M. Zoppi, Ph.D. Candidate
MAJ, MI, USAR
Student Investigator
College of Education
University of Maryland
College Park, Maryland 20742
www.education.umd.edu
(410) 451-5949 (voice/fax)
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Dennis M. Kivlighan, Jr., Ph.D.
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Joseph Psotka, Ph.D.
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psotka@ari.army.mil

Multi-Factor Leadership Questionnaire (MLQ)

The MLQ is one of the most widely used instruments to measure both transformational and transactional leader behaviors. It was developed by Bass and Avolio (Bass & Avolio, 2000). Leadership was defined by 9 general factors and 3 outcomes of leadership identified in the Multifactor Leadership Questionnaire. These 12 factors were: Idealized influence (attributed), idealized influence (behavior), inspirational motivation, intellectual stimulation, individual consideration, contingent reward, management by exception (active), management by exception (passive), laissez-faire leadership, and its outcomes are extra effort, efficiency, and satisfaction (Bass & Avolio).

Your leadership score results were:

CR   IS   MEP   MEA   LF   IIB   IM   IC   IIA   EE   E   S

Rank the above scores from highest to lowest – the MLQ indicates the range of multiple leadership style used by the leader.

See below for additional instructions to interpret your scores (scores are means).

Instructions:
Take each of your scores and insert them into the above box. Chart each item by number from highest to least. Read the description of the leadership behavior. Compare to the optimal profile.

Transformational Factors	Transactional Factors
Idealized Influence – Attributed (IIA)	Contingent Reward (CR)
Idealized Influence – Behavioral (IIB)	Management-by-exception active (MEA)
Inspirational Motivation (IM)	Management-by-exception passive (MEP)
Intellectual Stimulation (IS)	Laissez-faire-Leadership (L)
Individualized Consideration (IC)	**Outcomes** Extra Effort (EE) Effectiveness (E) Satisfaction (S)

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<center>**Description of Leadership Behavior Factors**</center>

Transformational Leadership
   Transformational leaders are proactive, raise follower awareness for transcendent collective interests, and help followers achieve extraordinary goals.
Idealized influence (attributed) refers to the socialized charisma of the leader, whether the leader is perceived as being confident and powerful, and whether the leader is viewed as focusing on higher-order ideals and ethics.
Idealized influence (behavior) refers to charismatic actions of the leader that are centered on values, beliefs, and a sense of mission.
Inspirational motivation refers to the ways leaders energize their followers by viewing the future with optimism, stressing ambitious goals, projecting an idealized vision, and communicating to followers that the vision is achievable.
Intellectual stimulation refers to leader actions that appeal to followers' sense of logic and analysis by challenging followers to think creatively and find solutions to difficult problems.
Individualized consideration refers to leader behavior that contributes to follower satisfaction by advising, supporting, and paying attention to the individual needs of followers, and thus allowing them to develop and self-actualize.
Transactional Leadership
   Transactional leadership is an exchange process based on the fulfillment of contractual obligations and is typically represented as setting objectives and monitoring and controlling outcomes.
Contingent reward leadership (i.e., constructive transactions) refers to leader behaviors focused on clarifying role and task requirements and providing followers with material or psychological rewards contingent on the fulfillment of contractual obligations.
Management-by-exception active (i.e., active corrective transactions) refers to the active vigilance of a leader whose goal is to ensure that standards are met.
Management-by-exception passive (i.e., passive corrective actions) leaders only intervene after noncompliance has occurred or when mistakes have already happened.
Laissez-faire leadership refers to the absence of a transaction of sorts with respect to leadership in which the leader avoids making decisions, abdicates responsibility, and does not use their authority. It is considered active to the extent that the leader "chooses" to avoid taking action. However, this component is generally the most passive and ineffective form of leadership.
Leadership Outcomes: Extra Effort refers to extra-effort provided in leadership. Effectiveness refers to effective leadership. Satisfaction refers to satisfaction dimension of leadership outcome.

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For additional information about the MLQ 5 contact:
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Appendix E: Multifactor Leadership Questionnaire (MLQ) Form 5X

Bass and Avolio (2000)
(Self-Rated, Level 0)

1. I specify the importance of having strong sense of purpose.

2. I am talking optimistically about the future.

3. I re-examine critical assumptions to question whether they are appropriate.

4. I spend time teaching and coaching.

5. I discuss in specific terms who is responsible for achieving performance targets.

Note: The publisher of the Multifactor Leadership Questionnaire only allows 5 items from the instrument to be included in any publishable work. For additional information about the MLQ, see www.mindgarden.com or contact Mr. Rob Most at mindgarden@msn.com

MLQ   Multifactor Leadership Questionnaire

Permission Set

Leader Form, Rater Form, and Scoring
Key for MLQ Form 5x-Short

Permission for Irene Zoppi to reproduce either leader or
rater forms for up to 1000 copies in one year from date
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January 30, 2004

by Bernard Bass and Bruce Avolio

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Appendix F: Acculturation Rating Scale (ARSMA II) for Hispanics/Latinos

Cuéllar, I., Arnold, B., & Maldonado, R. (1995).
(Adapted for Latinos/Hispanics)

1. I speak Spanish

2. I speak English

3. I enjoy speaking Spanish

4. I associate with Anglos

5. I associate with Hispanics/Latinos and/or U.S. Latinos/Hispanics

6. I enjoy listening to Spanish language music

7. I enjoy listening to English language music

8. I enjoy Spanish language TV

9. I enjoy English language TV

10. I enjoy English language movies

11. I enjoy Spanish language movies

12. I enjoy reading (e.g., books) in Spanish

13. I enjoy reading (e.g., books) in English

14. I write (e.g., letters) in Spanish

15. I write (e.g., letters) in English.

16. My thinking is done in the English language

17. My thinking is done in the Spanish language

18. My contact with Latino/Hispanic countries has been

19. My contact with the USA has been

20. My father identifies or identified himself as "Hispanic/Latino"

21. My mother identifies or identified herself as "Hispanic/Latina"

22. My friends, while I was growing up, were of Hispanic/Latino origin

23. My friends, while I was growing up, were of Anglo origin

24. My family cooks Hispanic/Latino foods

25. My friends now are of Anglo origin

26. My friends now are of Hispanic/Latino origin

27. I like to identify myself as an Anglo American

28. I like to identify myself as an American/U.S. Hispanic/Latino

29. I like to identify myself as a Hispanic/Latino

30. I like to identify myself as an American

31. I have difficulty accepting some <u>ideas</u> held by Anglos

32. I have difficulty accepting certain <u>attitudes</u> held by Anglos

33. I have difficulty accepting some <u>behaviors</u> exhibited by Anglos

34. I have difficulty accepting some <u>values</u> held by some Anglos

35. I have difficulty accepting certain <u>practices and customs</u> commonly found in some

36. I have, or think I would have, difficulty accepting Anglos as close personal friend

37. I have difficulty accepting <u>ideas</u> held by some Hispanics/Latinos

38. I have difficulty accepting certain <u>attitudes</u> held by Hispanics/Latinos

39. I have difficulty accepting some <u>behaviors</u> exhibited by Hispanics/Latinos

40. I have difficulty accepting some <u>values</u> held by some Hispanics/Latinos

41. I have difficulty accepting certain <u>practices and customs</u> commonly found
    in some Hispanics/Latinos

42. I have, or think I would have, difficulty accepting Hispanics/Latinos

    as close peers or friends

43. I have difficulty accepting <u>ideas</u> held by some U.S. Hispanics/Latinos

44. I have difficulty accepting certain <u>attitudes</u> held by U.S. Hispanics/Latinos

45. I have difficulty accepting some <u>behaviors</u> exhibited by U.S. Hispanics/Latinos

46. I have difficulty accepting some <u>values</u> held by U.S. Hispanics/Latinos

47. I have difficulty accepting certain <u>practices and customs</u> commonly found
    in some U.S. Hispanics/Latinos

48. I have, or think I would have, difficulty accepting U.S. Hispanics/Latinos as close
    personal friends

MICHIGAN STATE
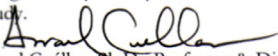## UNIVERSITY

February 2, 2004

Irene Zoppi
2309 Westport Lane,
Crofton, MD 21114

Dear Irene,

As copyright holder of the 1995 Acculturation Rating Scale for Mexican American- II (ARSMA-II) (Revised edition) Scales 1 &2. I grant you rights to make copies of these scales for research purposes related to your research on Latinas in the Military and Leadership. I also grant you permission to make modifications and I approve your adaptations of ARSMA-II, both Scales 1 and Scale 2 in order to make them culturally appropriate and valid for a broader Latino/a group(s). However, reliability and validity will need to be re-established with your population based on your modifications, if any. I request that you make appropriate reference to the 1995 ARSMA-II:

Cuéllar, I., Arnold, B., & Maldonado, R. (1995). Acculturation Rating Scale for Mexican Americans-II: A Revision of the Original ARSMA Scale. *Hispanic Journal of Behavioral Sciences,* Vol. 17 (3), 275-304].

If you have any questions or concerns, please do not hesitate to contact me. I congratulate you on your interests and research to date on this important area of study.

Israel Cuéllar, Ph.D., Professor & Director
Julian Samora Research Institute

Appendix G: Individualism/Collectivism Questionnaire (I-C)

Harry C. Triandis and Michele J. Gelfand (1998)

1. I would rather depend on myself than others

2. If a coworker gets a prize, I would feel proud

3. It is important that I do my job better than others

4. Parents and children must stay together as much as possible

5. I rely on myself most of the time; I rarely rely on others

6. The well-being of my coworkers is important to me

7. Winning is everything

8. It is my duty to take care of my family, even when I have to sacrifice what I want

9. I often do my own thing

10. To me, pleasure is spending time with others

11. Competition is the law of nature

12. Family members should stick together, no matter what sacrifices are required

13. My personal identity, independent of others, is very important to me

14. I feel good when I cooperate with others

15. When another person does better than I do, I get tense and aroused

16. It is important to me that I respect the decisions made by my groups

17. I enjoy working in situations involving competition

18. If a relative were in financial difficulty, I would help within my means

19. Children should be taught to place duty before pleasure

20. Some people emphasize winning; I am not one of them

21. It is important to me to maintain harmony in my group

22. Without competition, it is not possible to have a good society

23. I usually sacrifice my self-interest for the benefit of my group

24. It annoys me when other people perform better than I do

25. I like sharing little things with my neighbors

26. My happiness depends very much on the happiness of those around me

27. Being a unique individual is important to me.

Appendix H: U.S. Army Latino/Hispanic Officer Demographic Questionnaire

Irene M. Zoppi, MAJ, MI, USAR (2004)

1. Are you a Latina/Hispanic female Army officer on active duty?
Mark all that apply.

  _Yes → **GO TO QUESTION 2 BELOW**.

  _ No, I am not Latina/Hispanic.
  _ No, I am not female.
  _ No, I am not an Army officer.
  _ No, I am not on active duty.

If you answered NO, you are not eligible to complete the survey. Please return it in the envelope provided. Thank You!

2. In what year were you born? _____

3a. In what city and country were you born?

_____

3b. If you were born outside of the United States, in what year did you move to the U.S.? _____

  _ Does not apply; I was born in the U.S.

4. What is your current marital status?
  _ Single, never married
  _ Single, engaged to be married
  _ Married
  _ Separated
  _ Divorced
  _ Widowed

5. How many children do you have?
  _ None
  _ 1
  _ 2
  _ 3
  _ 4 or more

6. What is your racial background? <u>Mark all that apply.</u>
_ African-American/Black
_ American Indian or Alaska Native
_ Anglo/White
_ Asian
_ Native Hawaiian or other Pacific Islander
_ Other _____

7. What is your cultural sub-ethnic group? <u>Mark all that apply</u>.
_ Argentina
_ Bolivia
_ Chile
_ Bolivia
_ Colombia
_ Costa Rica
_ Cuba
_ Dominican Republic
_ Ecuador
_ El Salvador
_ Guatemala
_ Honduras
_ Mexico
_ Nicaragua
_ Panama
_ Paraguay
_ Peru
_ Puerto Rico
_ Spain
_ Uruguay
_ Venezuela

_ Other_____

8. What is the highest level of education that you have completed? <u>Mark only one</u>
<u>and state field of study</u> (Example: Bachelor's Degree <u>- Arts</u>).
_ Some college
_ Bachelor's Degree _____
_ Some graduate school credits
_ Master's Degree or equivalent _____
_ Doctorate or professional degree
(such as MD, DDS, Ph.D., or JD) _____

9a. Do you have prior military service?
   _ Yes, as an enlisted Soldier _____ years
   _ Yes, as an Officer or Warrant Officer_____ years
   _ No → GO TO QUESTION 10

9b. In which branch of the Armed Forces was your prior service?

   _ Air Force _ Marines _ Reserve or National Guard   _ Army   _ Navy

10. How many years of military service (Active and/or Reserve) have you completed? Total _____ years

11. What is your current rank and pay grade?
_ O1 _ O2 _ O3 _ O4 _ O5 _ O6 _ O7 _ O8 _ O9

12a. What is your current branch or occupational specialty?_____
(Example: MI, 35D)

12b. What is your current duty position? _____ Example: BN Commander)

12c. What is your current unit (type and level)? _____
(Example: Medical, Brigade)

13. What is the highest level of military education/ training you have completed?
Mark only one.
   _ U.S. Army ROTC
   _ U.S. Military Academy, West Point
   _ Basic Officer Course
   _ Advanced Officer Course
   _ CAS3
   _ CGSC
   _ War College   _ Other:_____

14. Mark the generation that best describes you.
 _ **1st generation**: You were born in a Hispanic/Latino country.
 _ **2nd generation**: You were born in the United States; and either parent was born in a Hispanic/Latino country.
 _ **3rd generation**: You were born in the United States and all grandparents were born in a Hispanic/Latino country.
 _ **4th generation**: You and your parents were born in the United States and at least one grandparent was born in a Hispanic/Latino country.
 _ **5th generation**: You and your parents were born in the United States and all grandparents were born in the U.S.

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