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Cabinet-Level School Administrators Intragroup and Intergroup Identity and Positive Leader-Member Exchange Dynamics: A Single Case Study

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A dissertation submitted in satisfaction

of the requirements for the degree of

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by

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Dedication

This academic journey has been made possible by the unwavering support, patience, and inspiration of my family, to whom I owe immense gratitude. My wife, Cristy Berger, has been a constant source of strength and encouragement, providing unwavering support and belief in my abilities. Her presence, whether quietly supporting me or offering vocal encouragement, has been the cornerstone of my achievements. Without her steadfast support, none of this would have been possible. My two sons, Cody and Kane, have been my driving force, serving as a constant reminder of the importance of perseverance and resilience in the face of challenges. Witnessing their courage in overcoming obstacles has motivated me to push through even when the journey seemed daunting. Whenever I felt like giving up, I would look at them and remember my own words to them about the importance of seeing things through to the end. I embarked on this journey with the goal of setting an example for them, and that with dedication and hard work, anything is possible, regardless of age or circumstances.

In addition to my immediate family, I am deeply grateful to my mother, whose teachings and examples have instilled in me the value of hard work and resilience. She taught me that mistakes are inevitable, but they do not define us; rather, how we learn and grow from them shapes our character. Her unwavering belief in me has been a guiding light throughout this journey, reminding me to stay focused on my goals and never lose sight of the lessons learned. I offer my heartfelt appreciation and love to my family, who have stood by me through the highs and lows of this academic pursuit. This dissertation is dedicated to you as a token of my gratitude for your unwavering support and belief in me and us.

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Abstract

This qualitative case study explored the challenges faced by the cabinet-level administration of a South Texas K-12 public school district in navigating intragroup and intergroup identity dynamics, impacting leader-member exchange, follower obligation, organizational behavior, and citizenship. Poor integration led to silo mentalities due to a lack of communication skills and social identity awareness among leadership. The study explored the influence of leaders' attitudes and behaviors on intergroup and intragroup identities by examining how positive leader-member exchange practices affected collective organizational behaviors. Employing the framework of social identity theory, this study contributed to understanding specific leadership domains and the effective motivation of followers within an organizational context influenced by their perceptions. Over three months, the researcher interviewed four cabinet-level leaders, observed eight direct reports, and reviewed artifacts. Thematic analysis revealed the importance of proximity in facilitating open communication and the challenges it introduced, such as perceptions of favoritism. Identified effective communication channels and quick responses are pivotal for fostering trust and organizational effectiveness. Followers' perceptions highlighted the significance of trust, collaboration, and transparent communication in fostering ingroup dynamics and a positive sense of belonging, aligning with organizational goals. The study underscored the need for leaders to skillfully navigate complexities to foster purpose-aligned outcomes and cultivate a supportive environment in which team members feel empowered to contribute effectively towards shared objectives, thereby striving towards improvement.

Keywords: Leadership dynamics, social identity theory, leader-member exchange, organizational behavior, K-12 public education

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Chapter 1: Introduction

The U.S. K-12 public education leadership structure is hierarchical, with the superintendent and cabinet members at the organization's top; the superintendent and cabinet leadership typically rise to their positions through campus principal positions or corporate leadership jobs (Connolly et al., 2018). There is a correlation between principal leadership training and the skills and traits these leaders bring to the job, but there is a lack of understanding regarding how these traits and skills transfer to whole district leadership (Boren et al., 2021). Wallace et al. (2020) argued that theoretical and empirical research on individual and collective skills and outcomes highlight leadership development gaps. The research noted that current leadership development practices focus on behavioral outcomes and skill acquisition but ignore the multidimensional nature of leadership development (Wallace et al., 2020). Leadership development has migrated from individual behavior traits to a better understanding of the social and relational dynamics between leader and follower and how self and group identity play a role in leadership effectiveness to motivate action (Lord et al., 2016).

The complex nature of leadership Is evolving from a silo mentality of power control to cross-functional teams that share power and information (Casciaro et al., 2019). Developing social and emotional skills as a leader involves building trust at an organization's individual and collective levels (Fianko et al., 2020). Affective trust and relational identification are strong indicators of positive social exchange relationships in organizations and underscore the practical realization of leadership behaviors (Legood et al., 2021). While shared collective identity is crucial for leadership, Channing (2020) found that human relations skill development is lacking in leadership development and perceived organizational effectiveness.

Rast et al. (2018) highlighted that effectively managing intergroup relations and conflicts is a significant challenge facing many organizational leaders and is confounded by the lack of understanding of the psychological processes that create intergroup conflict. The superintendent relies on the cabinet to effectively lead and support the departments that support the campus and student instruction (Connolly et al., 2018). In K-12 public education, an insular mindset and lack of understanding of intergroup identity can create a disconnect between the superintendent, cabinet, and campus leadership (Rast et al., 2018). Perceived individual-leader and group-leader relationships influence follower obligation, organizational behavior, and citizenship (Lee et al., 2019). To strengthen organizational health and commitment while fostering trust and job satisfaction, leadership behaviors in school cultures need to create a shared identity within the organization (Reicher et al., 2018). A leader must recognize that without understanding the social process of leadership, control from only a prototypical perception might not be enough to eliminate conflict in subgroup identities (Steffens et al., 2021).

As Reicher et al. (2018) explained, leadership is not just representing a given group; a leader must also create, advance, and embed a shared social identity at the individual and collective levels. When a leader creates a shared social identity and understands that they are a member of the same group, the group works toward emerging group norms and acts collaboratively to advance and accomplish group goals (Dick et al., 2018). The challenge is that top-level K-12 public educational leadership does not fully reflect, represent, and realize the importance of the social identity approach to leadership in building effective organizational structures that support leadership development and group salience (van Knippenberg, 2023).

Leader-member exchange is a process of leadership based on the leader-follower dyadic relationship centered around effective communication that contains mutual trust, respect, and commitment (Northouse, 2018). Low leader-member exchange relationships create high-level exchange groups in an isolated environment that is counterproductive to the overall organizational health of the district (Zhao et al., 2019). The difficulty of managing group relations in an organization is common and is related to not knowing the psychological processes that sustain group identity or issues that can create conflict (Rast et al., 2020).

Statement of the Problem

Cabinet-level leadership that does not recognize the importance of intergroup and intragroup dynamics has affected the leader-member exchange in a South Texas suburban K-12 public school district (ST District, a pseudonym) of approximately 21,000 students. Poor incorporation of relational leadership theory and social networking to establish the connection between leader and follower and how self and group identity play a role can create silo mentalities (Casciaro et al., 2019). Studies have attributed silo mentality in organizations to underdeveloped communication skills and social identity awareness of leadership (Smith et al., 2020). Leaders have a pivotal role in creating organizational culture, but there often needs to be more connection between developing human relations skills and leadership (Channing, 2020).

The problem addressed in this study was the struggle that the cabinet-level administration of the ST District had navigating intragroup and intergroup identity as they worked to create positive leader-member exchange dynamics. A lack of understanding of intergroup identity can disconnect upper-echelon leadership and followers and cause poorly perceived individual-leader and group-leader relationships that negatively influence follower obligation, organizational behavior, and citizenship (Lee et al., 2019). A global culture of individualism has moved towards a more collaborative way of working in schools through shared leadership and collaborative professional practices (Adolfsson & Håkansson, 2019). However, leadership views of organizational structure and practices can derail the transition from traditional hierarchical leadership to cross-functional shared practices (Forsten-Astikainen et al., 2017). This study addressed how leadership style and navigation of group identities affected individual and collective self-protection mechanisms that could derail purpose-aligned outcomes intended to meet shared district goals (Casey et al., 2021).

Purpose of the Study

The purpose of this qualitative case study was to identify how cabinet-level leaders' attitudes and behaviors influence intergroup and intragroup identities. This single case exploratory study examined how positive leader-member exchange (LMX) practices of ST District's cabinet-level administration impacted collective organizational behaviors. By analyzing interview data, observation data, and organizational artifacts, this study's results helped shed light on the K-12 public school leadership development in social identity to enhance collaboration among intergroup and intragroup followers, resulting in better organizational health and student success.

Research Questions

The challenge of addressing leadership style and the navigation of group identity required exploring leadership characteristics, behaviors, and skills and how they influenced collective organizational behaviors. This study sought to answer the following research questions:

RQ1: How do positive leader-member exchange practices and behaviors influence collective organizational behaviors in a K-12 public education organization?

RQ2: How do followers' perceptions of leadership practices and behaviors influence their self and collective identities?

RQ3: How are purpose-aligned outcomes affected by identity leadership in K-12 public education?

Research by Forsten-Astikainen et al. (2017) has highlighted the benefits of transitioning from hierarchical leadership to cross-functional shared practices. For K-12 public education organizations to evolve with this transition in leadership, I conducted a qualitative case study to answer the research questions and address the problem of practice.

Definition of Key Terms

The following terms are used in this study:

Cabinet-level leadership. Cabinet-level leadership references an organization's upper echelon of leaders that informs the superintendent and supports down-the-line departments and campuses (LeChasseur, 2017). For this study, cabinet-level leadership refers to district-level leaders at the executive or assistant superintendent level, with district-level department directors as direct reports.

Economic leader-member exchange. Economic leader-member exchange (ELMX) is a transactional and contractual relationship based on formal status differences and short-term discrete agreements (Buch et al., 2019).

Group identification. Group identification references an individual’s collective awareness that the social distinction of their group is known and can also be referred to as group identity, ingroup identity, and intragroup identification (Brown et al., 2022).

Intergroup identity. Intergroup identity refers to a social distinction or outgrouping of one or more people due to interactions and relationships based on different social categories or identities (Brown et al., 2022)

Intragroup identity. Intragroup identity refers to a social distinction of one or more people in the same group based on the interactions and relationships related to a common social category or identity (Brown et al., 2022).

Leader-member exchange. Leader-member exchange (LMX) is a dyadic leadership paradigm that suggests that leaders and followers develop unique relationships based on their social exchanges. The quality of these exchanges within an organization can influence employee outcomes (Coleman & Donoher, 2022).

Relational leadership theory. Relational leadership theory values inclusion, empowerment, purposefulness, ethical behaviors, and process orientation (Uhl-Bien, 2006).

Silo mentality. Silo mentality is an organizational reluctance to share information among employees of different divisions in the same company. This attitude is seen as reducing the organization's efficiency and, at worst, contributing to a damaged organizational culture (de Waal et al., 2019).

Social identity theory. Social identity theory (SIT) is a theory that predicts certain intergroup behaviors based on perceived group status differences, the perceived legitimacy and stability of those status differences, and the perceived ability to move from one group to another (Arshad et al., 2022).

Social leader-member exchange. Social leader-member exchange (SLMX) is either a low or high-quality LMX, where exchanges between leaders and followers are based on feelings of diffuse future obligations to reciprocate (Buch et al., 2019).

Summary

The focus of this study was on the influence of identity leadership on leader-member exchange practices and behaviors and how collective organizational behaviors are changed. I sought to explore relational leadership in K-12 public education through the actions of cabinet-level leadership. Using a case study approach combining interviews, artifacts, and observations, I sought to answer how leaders' understanding of social identity theory and leader-member exchange influenced collective organizational behaviors and whether followers’ organizational identities influenced aligned outcomes. The aim of the study was to add to the understanding of leadership development in social identity leadership and to enhance the practice of building collaboration among intergroup and intragroup teams. The following chapter reviews the current literature on the topic.

Chapter 2: Literature Review

The purpose of this study was to identify how cabinet-level leaders' attitudes and behaviors influenced intergroup and intragroup identities in efforts to enhance collaboration among intergroup and intragroup followers, resulting in better organizational health and student success. This chapter reviews the study's theoretical framework and outlines existing research related to school leadership. The theoretical framework section focuses on how social identity theory (SIT) serves as the framework for this case study. The literature review provides an understanding of current research on K-12 public school leadership structures and training and how the outcomes of this case study add to leadership and organizational outcomes research.

Literature Search Methods

The literature review for this study accessed several databases: ProQuest, EBSCO, Abilene Christian University Library, Google Scholar, and reference textbooks. Keyword searches focused on the literature review, using the following terms: *LMX*, *SIT*, *educational leadership*, *silo mentality*, and *social leadership theory*. The search focused on peer-reviewed articles published primarily from 2019–2023, along with additional seminal works in the field.

Theoretical Framework Discussion

This study used an SIT framework to investigate how leader and follower relationships establish conditions around organizational performance. The formation of organizational dyads is a psychosocial process, and the framework of SIT supports a better understanding of how these group interactions form and how individuals use social categorization to understand the identity of self and group better (Thrasher et al., 2020). Social categorization of SIT argues that individual identification steers individual behaviors, goals, and relationships (Tajfel & Turner, 2010) and that individuals judge themselves based on ingroup and outgroup affiliation.

This study adds to the research surrounding SIT and leadership practices. Looking at K-12 public school cabinet-level leadership through the lens of SIT supported an in-depth review of specific leadership domains. Research has shown that leaders' effectiveness is judged by their ability to motivate followers and advance organizations (Haslam et al., 2021). Leadership exists in an organizational context where followers' perceptions can impact the leaders' perceptions and effectiveness (Dinh et al., 2014). The lens of SIT allowed for the study to remain rooted in the theory that leaders must create and engage in a shared organizational identity, balance the membership and perceptions of ingroups and outgroups, and better implement an understanding of what it means to be a prototypical leader.

Social Identity Theory

The work of Henri Taifel in the 1970s formulated SIT and advanced the idea that an individual's sense of self is derived from unique personal identities as well as their inclusivity and identification with a group (Steffens et al., 2021). SIT explains the creation of follower relationships in an organization to garner influence through the social group process of creating a shared sense of belonging (Platow et al., 2015). As individuals seek belonging based on the perception of similar attributes found in other individuals, group affiliation is formed and is the basis of SIT (Turner, 2010).

Tajfel and Turner's (2004) expansion of their research explained that the three tenets of SIT revolve around the need for individuals to achieve positive social identity by comparing other groups to create connotative value. SIT research expanded further to include the influence of individual behaviors based on the formation of salient social identity directly connected to group membership (Hogg, 2006). This is important in organizational leadership and the navigation of groups because SIT research supports the idea that individual behavior is more connected to group membership and norms than individual values (Hogg & Smith, 2007). Understanding how SIT influences individuals and groups helps develop concepts of social identity leadership by emphasizing the creation of significant group norms and attitudes to regulate individual behaviors. (Charness & Chen, 2020).

Tenets of SIT

Tajfel and Turner (2004) noted individuals inherently want to create a positive self-concept. Inclusion in social groups adds connotative value by comparing other groups and is directly related to positive or negative feelings of value. In proposing SIT, Tajfel and Turner (2004) established that social categorization, identification, and comparison are all components of the process of achieving a positive social identity. Hogg and Smith (2007) researched SIT and established that group membership helps to frame the individual identity and, in turn, behaviors and attitudes towards ingroups and outgroups. The aspect of group membership was important to this study, and SIT was a valuable lens through which to review organizational group membership behaviors and ways to mitigate and influence their development.

SIT is the most frequent framework used to explain individual identification within an organization (Gond et al., 2017). This is partly due to the social categorization process that emphasizes group diversity and differences (Tajfel & Turner, 2010) and supports the maintenance of self-esteem and identification by protecting the interests of the ingroup perceived to receive the most favor and resources (Verkuyten & Brug, 2004). The legitimacy of the ingroup that an individual belongs to or wishes to belong to can determine the organizational process and strategies they exhibit (Martiny & Rubin, 2016). Individuals will employ individual mobility, social competition, and social creativity strategies if comparisons of their group result in unsatisfactory social identities (Scheifele et al., 2021). When discussing individual social identity, the significance of group membership cannot be emphasized enough (Davis et al., 2019). Organizations must understand that self-identity and self-concept are related to the distinctiveness of group identification (Scheepers & Ellemers, 2019). Organizational attitudes and behaviors will be determined by attempts to maximize group status while holding down outgroup perceptions (van Bezouw et al., 2021).

Social Identity Leadership

Social identity leadership recognizes the creation of leaders from self and social categorization. Leaders provide an identity function for group members by exemplifying the prototypical nature of ingroup members (Gaffney et al., 2018). SIT has divided leadership into distinct dimensions: identity creating, advancement, and embedding (Haslam et al., 2021), which work to build follower trust and positive organizational behavior (Barreto & Hogg, 2017).

In times of change or uncertainty, group identity is challenged, requiring influential leaders who can promote cooperation among subgroups, yet granting excessive power to prototypical leaders within groups can lead to conflicts (Barreto & Hogg, 2017). If a leader wants to bridge intergroup conflict and navigate difficult organizational climates, there needs to be an understanding of how and when to be atypical (Gaffney et al., 2018). Using social identity theory as a framework for this single case study was important because it allowed me to view the psychological dimensions of identity leadership associated with the complex nature of K-12 public education.

There was a need to understand the complexity of building an inclusive team that encourages group belonging and maintains the opportunity to express unique identities (Ashikali et al., 2020). K-12 leaders sometimes need help understanding how to foster trust in both ingroup and outgroup factions of the organization or community (Westberry & Zhao, 2021). Leaders can maintain prototypicality within ingroups and promote procedural fairness within outgroups by understanding how to implement actionable steps to develop subtle identity performance measures (Jones et al., 2020). SIT's key factors for leadership require leaders and followers to share a sense of *we*, which requires a leader to embody group characteristics while advancing shared interests to avoid fracturing groups and limited identity leadership (Dick et al., 2018).

SIT can allow leaders to see the separation between us and them and better comprehend how individuals identify with ingroups and outgroups (Tear & Reader, 2023). The social identity approach to leadership further argues that successful leadership, as a process of social influence, involves making followers want to contribute to shared goals (Haslam et al., 2021). Qualitative data have shown how a silo mentality in an organization comes from a lack of trust and an absence of a shared culture (Smith et al., 2020). Organizational silos are psychological boundaries creating compartmentalization, segregation, and differentiation (Diamond & Allcorn, 2009), often due to poor identity leadership and authentic communication that create a lack of trust and power struggles. A traditional K-12 hierarchy may not lend itself to a shared identity within the organization and can contribute to a protectionist insular mindset. Followers' insular mindsets inhibit cross-departmental collaboration and cooperation and stifle innovation and performance (de Waal et al., 2019). Leaders with poor intergroup skills and relational and identity leadership development can encourage group conflict and create a lack of organizational behavior and commitment to shared goals (de Waal et al., 2019).

Understanding the dyadic relationship between leader and follower is enhanced when the underlying psychosocial process is informed by the established framework provided by social identity theory (Thrasher et al., 2020). Current work with SIT combines cognitive and behavioral representations to explain how leaders can influence organizational effectiveness by representing, creating, implementing, and embedding a shared identity (Steffens et al., 2021). This framework was important because it goes beyond the *what* of leadership and helps explain the *how* of leadership. Meta-analytic evidence has shown that understanding SIT and identity leadership influences and improves in-role and extra-role performance in an organization (Steffens et al., 2021) and promotes innovation and positive organizational behavior (Dick et al., 2018). Using the SIT framework helped me outline the multidimensional factors of leadership and help define the psychological perspectives needed to improve K-12 public education leadership practices. Identity leadership recognizes that leadership is inherently connected to group dynamics and that effective leadership entails creating, managing, and advancing a shared social identity (Haslam et al., 2020).

Literature Review

My objective in this singular case study was to discern the impact of K-12 cabinet-level leaders' attitudes and behaviors on both intergroup and intragroup identities. The literature review details the current understanding of LMX theory, identity leadership, organizational hierarchies, and current K-12 public education leadership training trends.

Leader-Member Exchange Theory

A flawed social identity framework can influence the legitimization of power, roles, and hierarchies within an organization's culture, thereby fostering intergroup conflict (Bochatay et al., 2019). Ingroup identification can be described as the values and emotional significance tied to a specific group membership (Flamino et al., 2021). LMX theory purports that leaders interact with their subordinates at varying levels depending on whether the subordinates are part of the ingroup (i.e., high-quality relationship) or outgroup (i.e., low-quality relationship; Park et al., 2022). In exchange for organizational commitment and performance, the ingroup members are often given additional responsibility, autonomy, increased communication with their supervisors, and trust (Graen et al., 2006). The outgroup members do not experience the same responsibility, autonomy, communication, and trust as their supervisors. Conversely, low-quality LMX relationships have resulted in higher levels of supervisor control and directives, lower levels of subordinate satisfaction, higher levels of subordinate turnover, and less desired assignments (Dutton, 2003).

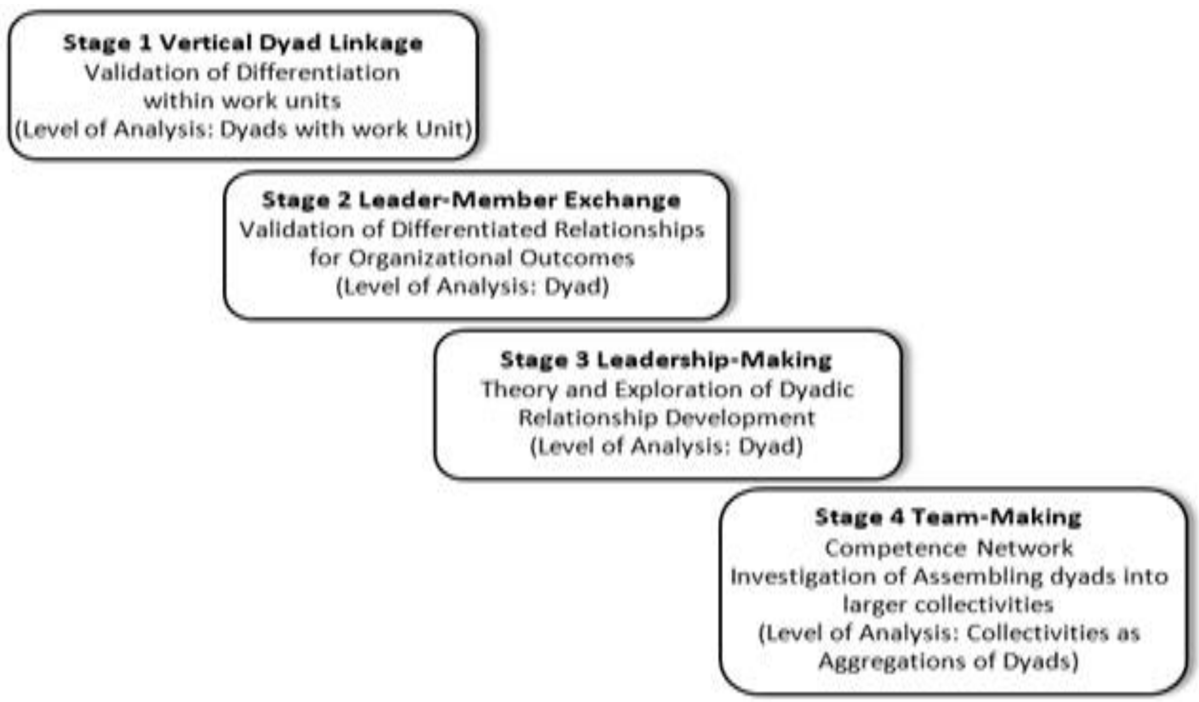
Organizational leaders benefit from a better understanding of individual relationships in a group setting because leaders with a better understanding of high or low-quality LMX through a lens of LMX differentiation see how social comparison emotions motivate employee organizational citizenship behavior and counterproductive work behavior and help reduce intergroup tensions (Matta et al., 2020). LMX emphasizes a mutual relationship between leaders and followers beyond a traditional hierarchical process (Flamino et al., 2021).

As originally developed by Graen and Uhl-Bien (1995), LMX theory has its foundation in social settings and exchanges with reciprocity of relationships at its core. Leadership is an influential reciprocity that can lead to stronger role behaviors at the individual and group levels, or if there is a lack of situational exchanges of mutual trust, the social exchange between leader and follower is low and can inhibit positive organizational behavior and extra-role expression (Ng, 2017). Complex organizational systems, like K-12 public education, require synchronization and transmission produced by leadership that understands LMX theory to create expanded and negotiated roles with followers for greater organizational health (Hofmans et al., 2019).

LMX Stages of Development. The theory of LMX began in 1975 with vertical dyad linkage (VDL) research (Northouse, 2018), where leadership relationships with followers began to be viewed at varying levels. Figure 1 shows how the research began classifying ingroups and outgroups in an organization and identified four stages that highlighted differentiated dyads (Graen & Uhi Ben, 1995).

Figure 1

Stages in Development of LMX Theory



Note. Stages of LMX based on Graen and Uhl Bien (1995). Reprinted with permission from Wikimedia Commons 2015, https://commons.wikimedia.org/wiki/File:LMX_Stages.PNG.

LMX research began to classify leaders as the catalyst in dyadic relationships that allow individuals to move from outgroup members to identified team individuals wanting to extend job duties (Derindag et al., 2021). A synthesis of LMX research classifies these dyadic relationships as high frequency of communications but low in quality, low frequency but high quality, high frequency, and high quality, or low frequency and low quality (Clifford, 2017). In this research study, I reviewed the problem along the continuum of the LMX developmental stages to determine how leadership perceptions of self and followers' perceptions of leaders developed to create better leaders and system-level relationships to support improved organizational behavior and outcomes.

LMX Differentiation and Inclusion

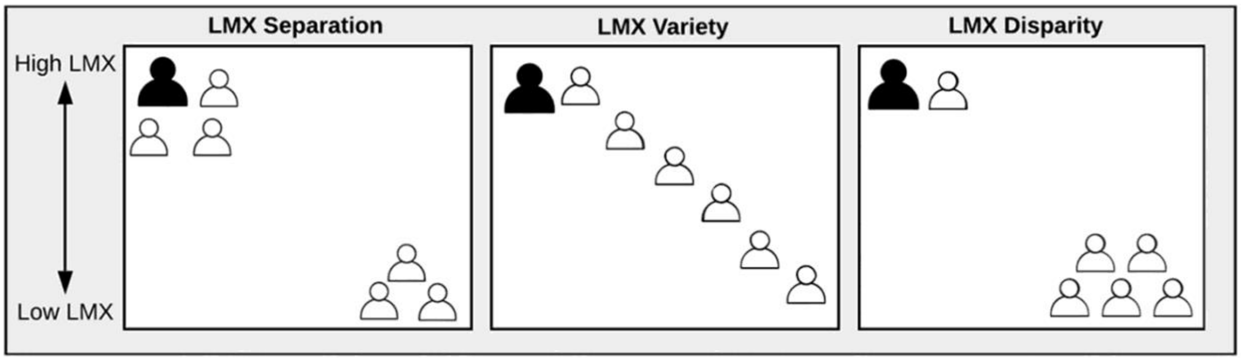
Research indicates that cultivating high-quality relationships with leaders enhances followers' well-being and organizational behavior, primarily due to the heightened provision of support and resources (Harms et al., 2017). The problem and the relation to this study are that leadership behavior constraints are directly related to mental and physical resource availability that cause leaders to subjectively differentiate follower relationships, which results in lower performance-related outcomes (Gooty & Yammarino, 2016). This was important because research has also found that the benefits of a high LMX relationship are hindered further when a leader does not fully understand the dynamics of LMX differentiation and that the inclusion or exclusion of limited resources can contribute to generally lower organizational well-being (Yu et al., 2018). This is because Leader-Member Exchange (LMX) is based on the follower's perception of their relationship with the leader and the quality of relationships others have with the same leader. As it relates to this study, LMX differentiation was not inherently positive or negative but was a complex and dynamic function shaped by multiple competing influences that require keen leadership understanding and perspective (Han et al., 2021).

From its inception as vertical dyad linkage (Graen & Cashman, 1975), the concepts surrounding a relationship-based approach to leadership have evolved into the common way of thinking surrounding LMX theory. This case study focused on public education leadership practices at the cabinet level. Research by Gerstner and Day (1997) established a significant correlation between LMX processes and increased follower satisfaction, performance, and retention. As the LMX theory evolved, it became evident that organizational and collective relationships played a significant role, leading to the development of LMX differentiation (Henderson et al., 2009).

The theoretical understanding of LMX and LMXD establishes that beyond the relationship quality between leader and follower, group dynamics are at play that incorporate group dispersion and diversity (Harrison & Klein, 2007) and that a mean-level effect exists in which within-group differences matter more than individual differences (Yu et al., 2018). LMX and LMXD overlay with the concepts of group diversity and the constructs of separation, variety, and disparity (Harrison & Klein, 2007). LMXD has been examined through the lenses of equity and equality. According to Deutsch (1975), equality pertains to an individual's perception of leader behavior as unfair, whereas equity perception suggests fairness as long as differential treatment aligns with work outcomes, as noted by Chen et al. (2018). Leaders face a challenge because even when they base individual and group norms on equity, followers' social dynamics and human nature tend to favor certain individuals and circumstances, inherently affecting how leader-follower relationships are perceived (Park et al., 2022). In group leadership, the divergence of perception and belief creates a separation in group dynamics, while a variety of knowledge and skills among members establishes unique relationships with leaders, and disparity denotes the unequal sharing of resources, all of which create high and low LMX relationships (see Figure 2).

Figure 2

Pictorial Representations of the Three LMX Differentiation Constructs



Note. = leader; = group member. Each figure illustrates the distribution of LMX relationships within groups at maximum level of LMX separation, LMX variety, and LMX disparity, respectively. High (low) LMX indicates a group member's high- (low-) quality LMX relationship with the leader. Adapted from "LMX Differentiation and Group Outcomes: A Framework and Review Drawing on Group Diversity Insights," by C. Buengeler, R. F. Piccolo, & L. R. Locklear (2021), *Journal of Management*, *47*(1), 260–287. Reprinted with permission.

Martin et al. (2016) argued that better organizational performance is due to job satisfaction created through trust and empowerment from the quality of the LMX relationship. A follower's identity is shaped by the attitudes and behaviors of the leader (Epitropaki et al., 2017). If a leader understands the SIT foundations of LMX differentiation, an inclusive process can take place allowing individual identities to form an organizational community (De Stobbeleir et al., 2018). A lack of LMX inclusionary practices is what contributes to a lack of high-quality LMX relationships and increased perceptions that leadership does not give credit to followers' thoughts or intentions related to self and organizational behavior and supports the formation of ingroupings and outgroupings (Buengeler et al., 2018).

Ingroup and Outgroup. LMX relationships can be categorized as ingroup, where followers perceive high-quality relationships characterized by trust, respect, and resource exchanges, or as outgroups, where perceptions of these dyadic relationships are lower among followers (Martin et al., 2016). The correlation of ingroups and outgroups to this study was that LMX differentiation has been largely ignored as it relates to the overlay of the social comparison theory and the motivating factors attributed to followers when they evaluate their perception of leader relationships with those of others (Estel et al., 2019). Ingroups and outgroups can form at the individual and team levels, with research stating that proactive behavior can be increased by leader recognition and allocation of resources, causing pressure for the follower to display reciprocating action through productive organizational behaviors (Anand et al., 2016). Leaders who do not fully understand the implications of high LMX differentiation promote ingroup prosocial behaviors while lowering outgroup members' exchange relationships and personal initiatives (Estel et al., 2019). A crucial implication of the research is the understanding that higher conflict and lower job satisfaction for followers in the outgroup is a byproduct of poorly managed LMX differentiation in individuals and teams (Anand et al., 2016). Data on the impact of a lack of LMX differentiation directly correlates to this study's problem statement because I argue that perceived and actual behaviors of leadership substantially influence team members' organizational behaviors and that LMX differentiation hinders outgroup members from contributing innovative ideas during team meetings (Tse et al., 2013).

Social LMX and Economic LMX. LMX theory has continued to develop with more sophisticated methods and modeling beyond the simple high/low socioemotional exchange relationship (Martin et al., 2016). One area of theory development was conceptualizing LMX as an economic and social relationship (Gottfredson et al., 2020). In a social LMX relationship, trust, diffuse obligations, and long-term investments form the basis, whereas economic LMX relationships are characterized by instrumentally exchanged obligations based on a quid pro quo established process (Kuvaas et al., 2012).

The social LMX is based on the perception of the follower's relationship with the leader—if the follower has a perception of a high social LMX relationship, this influences the follower's initiative and effort beyond the minimum requirements and creates improved individual and organizational performance (Andersen et al., 2020). The social LMX relationship is a long-term investment. In contrast, the economic LMX relationship is based more on the immediacy of the exchange and requires less obligation and investment due to the exchange of tangible resources (Buch et al., 2019).

Kuvaas et al. (2020) noted how research has established that social and economic LMX can exist simultaneously in an organization and that there was a need to further research how these relationships combine to create relational ambivalence, how they serve different roles for both leaders and followers and how limited research on leader characteristics aligned with the creation of social and economic LMX supports the importance of the researchers' case study. Leader role ambiguity and a lack of ability to navigate LMX groups can facilitate the creation of low LMX relations in both continuums that contribute to poor organizational culture and performance (Kuvaas et al., 2020).

Identity Leadership

Leader and leadership development has evolved from individual behavior traits to a better understanding of the social and relational dynamics between leader and follower and how self and group identity play a role in the effectiveness of leadership to motivate action (Lord et al., 2016). K-12 educational leadership programs are moving away from developing individual leadership traits and working to understand better how mutual influence and relational meaning-making support positive organizational and employee well-being (Kwok et al., 2018). As a trans-relational phenomenon, leadership is better understood through the lens of social identity theory (SIT), thereby enhancing organizational function through relational approaches (Branson & Marra, 2019). There is a continuing need for social capital and the ability of leaders to guide relationships in an organization to establish a shared purpose and influence the success or failure of the individual and organization (Dick et al., 2018). Leaders must have a more holistic understanding of social culture and invest in a cross-functional vision that builds connection and collaboration through mutually beneficial relationships (Branson & Marra, 2019). Studies have established that leadership is a construct between leader and follower based on mutually accepted values and beliefs, and the usefulness of a leader requires a review of the leader's ability to establish mutually beneficial relationships (Steffens et al., 2014). A leader's ability to represent the shared collective identity relates to actual and perceived effectiveness. Identity leadership has been associated with follower trust, job satisfaction, innovation, and extra-role performance (Sewell et al., 2021).

Cullen-Lester et al. (2017) advocated for additional research into the social aspects of leadership, emphasizing the importance of understanding how shared direction, alignment, and commitment are attained through organizational sense-making and learning. They also highlighted the significance of integrating relational leadership theory and social networking into leadership development efforts. Channing (2020) established the importance of SIT, relational leadership, and identity leadership, but from a K-12 administrative perspective, these relational components of leadership are missing in development programs and challenging organizational cultures (Lennon, 2020). Human relations skill development linked to follower identity management is an area that is lacking in both leadership development and perceived organizational effectiveness (Channing, 2020). Current leadership scholars agree that there needs to be a greater inclusion of relational and multilevel practices focused on leaders and followers in leadership development processes (Cullen-Lester et al., 2017). The human need to belong correlates with the LMX process and social identity approach to leadership in opening interlocking, fluid, nontraditional leader-follower relationships (Lord et al., 2016).

This study added to the understanding of leadership development in social identity leadership and enhanced the practice of building collaboration among intergroup and intragroup teams. Reicher et al. (2018) noted that the four dimensions of effective leadership related to SIT crystallize in leaders' creating and sense of “us” and seeing themselves as part of the same social category. The social identity approach differs from trait, transactional, and transformation because it does not set the leader apart from the group but posits that the shared membership allows for leadership to occur (Reicher et al., 2018).

Prototypical Leaders. The SIT of leadership argues that leaders define a group identity; thus, the leader should represent the group members by appearance and action (Hogg, 2018). This was where the concept of the prototypical leader comes into play: individuals receive the group’s trust based on cognitively identified attributes that align with a collection of followers. Based on these attributes, the leader and the group are prescribed behavior and social norms (Abrams & Hogg, 2010). The complex process of social identity and the creation of groups in an organization can be difficult for leaders because individuals often define themselves by the groups they are a member of and those they are not (Gaffney et al., 2018). For leaders, this can be a bit of a trap in that leaders arise from the group and represent the core attributes and behaviors of the group, thus giving others who identify as the ingroup greater social meaning and comfort to belong and remain in the ingroup. At the same time, this produces positive ingroup organizational behaviors (Barreto & Hogg, 2017). In a multifaceted organization, a leader can forget that they not only lead the group but, based on the prototypical theory of leadership, are members of that group. Leaders can become trapped in the prototypical group that supports evaluating the leader's effectiveness based on how well the leader serves the group's best interest and is not solely based on their skills and experiences (Mumford et al., 2017). In the complex organizations of K-12 public school systems, leaders must understand both the power of prototypical leadership and the ability to transition their identity to better manage group identities.

Intergroup Relational Identity. K-12 public schools are like many organizations that depend on individuals to form groups to achieve tasks; however, these groups may develop subidentities that undermine organizational progress (Rast et al., 2018). Promoting an intergroup relational identity can be difficult for leaders because it differs from the ideas of a dual identity and, if done correctly, can help a leader mitigate conflict between subgroups and subordinate groups (Kershaw et al., 2021). As a leader works to blend prototypical identity leadership to manage group identities, they begin to develop subgroup leadership skills. The challenge of group leadership lies in avoiding the fragmentation of identities by favoring one subgroup or subordinate group over another, which can lead to organizational conflict (Rast et al., 2018).

Intergroup relational identity allows leaders to establish mutually collaborative relationships for all groups (Kershaw et al., 2021). Operating within an organization involves managing identity leadership and group identity. Research indicates that fostering intergroup relational identity helps reduce threats to leadership stemming from distinct identity perceptions. By promoting intergroup relational identity, organizations cultivate climates conducive to positive behaviors. This approach enables individuals to define their group identity through membership while recognizing that collaboration with outgroup members shapes ingroup identity (Rast et al., 2018).

Organizational Climate

Organizational climate, a crucial determinant of organizational success, emerges when individual and group perceptions converge to shape values, beliefs, and behaviors stemming from experiences within the work environment (Ascorra et al., 2019). Organizational climate influences employee behavior, and employee behavior influences organizational climate. The collective perceptions of followers, experiences, and understanding of internal relationships create a school culture that defines a physical and social environment rooted in beliefs and values (Alqarni, 2020). The Texas Education Code (2019) defines school climate as the quality and character of school life, including interpersonal relationships.

The complicated job of district-level leadership requires ongoing engagement with several internal and external stakeholders involving dynamic social environments often controlled by bureaucratic authority and processes (DeMatthews et al., 2021). The educational climate was paramount for my study because of its focus on K-12 public education leadership and the navigation of group dynamics that are the catalysts for school culture. An educational climate consists of the shared beliefs, values, and attitudes created between administrators, teachers, and students (Khan & Idris, 2019) and creates positive outcomes when the school climate is conducive to positive organizational behavior (Ascorra et al., 2019).

Providing individual support for teachers in the classroom requiring attention to issues causing burnout and job dissatisfaction might seem the logical fix for district leadership. However, organizational research suggests that when the educational environment and culture are not addressed, targeted individual interventions fail (Iancu et al., 2018). Researchers suggest that further studies are required to determine the mitigating factors for school improvement and reducing educator burnout related to organizational interventions (Starling et al., 2021).

School leaders are responsible for creating school climate and culture, and if unhealthy climates go unchecked, the level of commitment by followers decreases, and the organization becomes unhealthy (Khan & Idris, 2019). Studies have argued that school climate affects student academic outcomes, behaviors, and commitment to achievement (Berkowitz, 2022) and directly correlates to cooperation between teachers, professional development, and job satisfaction. Understanding social identity and building high LMX relationships is important because leaders are a significant factor in promoting an inclusive climate (Thrasher et al., 2020) and must engage individuals and groups to form psychological safety and organizational identification (Kuknor & Bhattacharya, 2021).

Psychological Safety. If an organization wants to be a place for innovation based on individual and group learning and growth, there must be a climate that supports psychological safety (Edmondson, 2018). Psychological safety refers to individuals being able to communicate within an organizational structure without fear of cognitive judgment or system punishment (Miao et al., 2020). Research has established psychological safety as a lynchpin linking leadership and follower organizational engagement and explored how LMX is a mediating factor (Mao & Tian, 2022). Leadership behavior within group dynamics can create psychological safety because high-quality LMX creates trust and, in turn, creates a supportive organizational climate that supports followers' psychological safety (Xu et al., 2022). A supervisor's development of a supportive relationship with an employee not based on control allows employees to take risks, learn new skills, and share information and concerns (Maximo et al., 2019). A poor organizational climate limits psychological safety, damages employees' identity, and encourages withdrawal from positive organizational behavior (Newman et al., 2017).

Current leadership research on workplace climate and organizational psychological safety has yet to focus on public education and the possible positive impact these constructs can have on employee and student performance (Higgins et al., 2022). The benefit of the study by Edmonsdon et al. (2016) was an expansion of work done in the healthcare industry on the benefits of psychological safety and how they parallel public education. Both organizations have complex challenges and large amounts of interdependent tasks that require a climate that experiences leadership perspectives in various group dynamics and where trust is required to promote learning and innovation (Edmondson et al., 2016). In addition to the interdependence of team efforts, nursing and education also involve independent functions that require the climate to be viewed from an organizational level where leadership behavior is a marker for membership behaviors (Higgins et al., 2022).

Organizational Identification. Positive organizational climate and psychological safety are mitigating factors for employee organizational behaviors and contribute to an organizational identification process that creates mental models for individuals (Freire et al., 2022). Organizational identification can be a source of positive outcomes for an organization and its members because it creates a perceived oneness within the organization (Tarakci et al., 2018). This aspect of organizational climate was important to my study because it takes employee self-identification and correlates it with the organization based on perceived values and belongingness, which creates an overlap of self and group identification (Ma et al., 2022). Current research has noted that employee identification with a leader and organization is related to cognition and behavior (Marstand et al., 2021) because employees infer social identification with the group based on the strength of their social relationship with a leader (Horstmeier et al., 2017). While current research suggests that leaders play a key role in employee identification with the organization, especially those not predisposed to identify with a specific group (Marstand et al., 2021), limited studies review how these findings influence K-12 public education. For leaders, understanding training and promoting followers' social and organizational identity can contribute to positive work outcomes (Hoch et al., 2018).

Relational Trust. Relational trust must exist for K-12 public education to create organizational reform (Leis et al., 2017). In a public K-12 organization, the external and internal levels of trust directly correlate to the academic achievement of students in math and reading (Adams, 2019). This is why public education leaders must include relational trust in their cultural transformation and can understand social cues to increase the feelings of value and belonging for individuals and groups (Ng, 2017). Trust in the LMX relationship allows followers to perform extra-role tasks and establishes a difference between a low relationship and a bad relationship because trust serves as a maintenance function for social exchanges (Den Hartog, 2018). Framing the study through the lens of SIT makes relational trust an important factor in informing K-12 public leadership regarding intragroup dynamics because trust is a choice to be vulnerable to others (van der Werff et al., 2019) and is often based on the behaviors and attitudes of the leader (Baer et al., 2018).

Silo Mentality. All organizations strive to achieve sustainability and crave innovation. Organizations achieve this by maintaining operations while not negatively impacting social and ecological systems, focusing on increasing capacity and growth through a trusted process of knowledge sharing (de Waal et al., 2019). The term *silo* within an organization originated from grain silos that segregate materials, and it has been used as a metaphor when an organization is divided both vertically and horizontally by function and communications (Mouta & Meneses, 2021). Organizational silos are created when employees do not have a group think or care mentality and work for individual motives or group success that might not be tied to organizational goals or success. Organizational research contributes to the increased complexity between organizational structures and informal networks of communications and relationships that develop into social networks and break down further into clusters or silos (Centola, 2018). Organizational silos are a social manifestation created due to the perspectives and perceptions of individuals and groups within an organization and have a direct correlation to administrative decision-making, organizational communication loops, and incentive and recognition practices (de Waal et al., 2019). Organizational silos, as the metaphor of grain silos implies, prevent sharing of resources and information and create an insulated organizational culture that promotes reduced efficiency, which can lead to lower morale due to the creation of an us-versus-them mindset (Mouta & Meneses, 2021). Current literature categorizes organizational silos as a leadership issue, attributing mismanagement of intergroup and intragroup dynamics, or ingroups and outgroups of followers, to leaders' insufficient understanding of systems thinking and group dynamics (Carvalho Bento et al., 2020).

Organizational learning requires sharing information, depends on an organization’s cognitive, environmental, and behavioral factors, and is influenced by leadership behaviors and actions (Centola, 2018). The environment created by an organization contributes to the formation of silos, while follower cognitive attitudes create silo processes and support organizational behaviors that solidify silo functions (Carvalho Bento et al., 2020).

Power Dynamics in Hierarchical Design. The hierarchical structure of bureaucratic organizations fosters the social manifestations of silos by establishing ambiguous communication channels and impeding individual and team learning (Reese, 2021). In K-12 public education, a top-down approach of centrally driven policies leads to a disempowerment of subsets in the educational organization due to a lack of autonomy and ownership for the individuals—they feel leadership is too far removed from the followers and context (McLure & Aldridge, 2022). K-12 public education has inherent contextual complexities that require some hierarchical leadership design, but the leadership style can move an organization from a silo structure to a learning structure (Smith et al., 2020). Organizational hierarchy can create conflict and power struggles, resulting in withholding information and resources when leaders fail to recognize the need for vertical and horizontal coordination of individuals and teams (Matusik et al., 2022).

Power dynamics are inherent in hierarchical organizations due to the imbalance of real and perceived power, causing a decrease in organizational effectiveness due to poor alignment of communication and sharing of resources (Matusik et al., 2022). Research has established that the formal and positional power of the central office leadership in K-12 public schools may undermine campus-level leadership and classroom instruction due to coercion and the use of systematic power in social interactions (Wong et al., 2020). Due to a limited body of research on the role of power in the institutional environment of public education (Wong et al., 2020), a review of systemic and agentic power can help show how central office leadership influences individual and cultural norms of an organization. To mitigate the creation of silos influenced by the organizational hierarchy, leadership power should be viewed through a dyadic relationship lens rather than solely through one of authority (Salovaara & Bathurst, 2018). This may increase organizational identification and commitment for the individual and the teams (Ahmad & Gao, 2018).

Communication as Knowledge Sharing. Communication in an organization is most effective when individuals and groups coordinate and share information (Lewis, 2019). Organizational communication built on trust and openness contributes to follower identification with the group (Neill et al., 2020). Organizations require leadership to establish effective communication processes to allow knowledge sharing and help create a connection between individuals and the organization (Myers et al., 2016). Communication in an organization serves as a meaning-making process (Mayfield & Mayfield, 2017). Encouraging feedback and fostering reciprocal two-way communication by leaders leads to positive employee identification with the organization (Neill et al., 2020).

The issues arise when leadership does not prompt communication processes that encourage positive organizational behavior and communication (Yue et al., 2019). If organizational culture does not create trust in leadership and a climate for innovation, the power struggles become the culture, and knowledge is held at the individual and group levels and is ineffective for organizational growth (Rumanti et al., 2018). Effective information sharing within an organization occurs only when followers have confidence in their leaders (Rumanti et al., 2018). The work of leaders to understand follower identity and group think is vital to create the trust needed in an organization, because when followers lose confidence in leadership, communication becomes limited and a barrier to knowledge sharing (Ansong et al., 2023).

K-12 Public Educational Leadership

Educational leadership presents unique challenges and constraints, representing a significant subset of organizational leadership that warrants further research and analysis (Lennon, 2020). Systematic reform is required for K-12 leadership, especially from the superintendent and district-level leadership, to enhance social identity and diversity to support student growth (Rhymes & Sessoms-Penny, 2021). K-12 educational leaders assist their organizations by setting a shared direction that focuses on developing people and relationships to reach sustained desired practices. The success of these leadership practices depends on the level of sensitivity given to followers in the dynamic nature of schools (Hallinger, 2018). Leadership is a constructive process viewed from a reversing-the-lens model of how follower feedback can influence leadership; however, there is no research on team leadership outside the hierarchal organizational leadership model, especially in K-12 leadership (Jiang et al., 2021). Clapp-Smith et al. (2019) noted that leadership research often focuses on leadership traits, styles, and the formation of a leader. With little empirical research explaining how teams promote individual or group leaders, the result has been a lack of quality leadership in a group environment where shared leadership can enhance leadership behaviors and self-identity.

I conducted a keyword search for K-12 campus principal leadership from 2015 to 2021, yielding 6,090 results, whereas only 1,824 results were related to K-12 district leadership. While abundant research focuses on campus leadership training and application, there was far less research on K-12 district leadership training and practices. Available studies correlated a leader's influence on an organization and the application of social identity awareness and promotion of cross-functional teams, collaboration, and employee well-being (Smith et al., 2020). K-12 traditional hierarchical structures and preferential status obstruct team-based empowerment development and discourage leaders from facilitating increased shared leadership to promote team-based empowerment (Stewart et al., 2017).

Hogg (2018) noted that group conflict and subgroups will form if K-12 district-level leadership does not assertively define group attributes to help self-depersonalize through categorization. Hogg's (2018) research outlined that to mitigate this phenomenon, intergroup leadership practices should be cultivated, emphasizing the celebration of cooperative interrelationships among subgroups and striving to prevent overidentification with any one subgroup over another. The summary of current literature emphasizes the pivotal role leaders play in the group dynamics of an organization and highlights research gaps. A K-12 public education leader's ability to represent the shared collective identity is linked to actual and perceived effectiveness (Sewell et al., 2021). Contributing to the value of this study, shared collective identity was crucial for leadership; however, data found that human relations skill development was lacking in leadership development and perceived organizational effectiveness (Channing, 2020).

Cabinet-Level Leadership. School leadership and effectiveness significantly influence student outcomes and organizational improvement. Research continues to note the need for strong leadership structures that support leadership development (O'Brien et al., 2016). Traditional organizational structures of public-school systems are a hierarchical design with a superintendent at the top supported by certified personnel that oversees divisions of the district, including curriculum and instruction, budget and finance, safety and security, operations and maintenance, technology, campus leadership, and human resources (Connolly et al., 2018). While the superintendent leads a school district, the size of a district and required state and local mandates inherently require a division of leadership to upper management positions, commonly known as a cabinet, that help oversee the day-to-day operations and set strategic planning and district culture (Smith et al., 2020).

Educational Leadership Training. The core reason for public education is to achieve student academic progress, but the ever-changing public school environment has caused traditional leadership development practices to become obsolete due to the complex organizational and human relations facing district-level leaders and the lack of focus on current organizational behavior management strategies (DeMatthews et al., 2021). The National Educational Leadership Preparation (NELP, 2018) cites that educational leaders are accountable for every student's academic success and well-being. The NELP does mention the operation and management of adults in its sixth standard, but the focus of public education leadership is student-centered. District-level leadership training and practices are primarily guided by student-centered strategies aimed at operational management to enhance student learning support. However, there is a notable deficiency in details, awareness, and understanding regarding behavior management techniques, consequently constraining the efficacy of public-school leadership (Starling et al., 2021).

Adopting behavior sciences into public education leadership training would support a better understanding of the influence a school leader has on the cultivation of the organizational climate and conditions needed to create individual and group dynamics that support the betterment of the system (Houmanfar et al., 2018). Gallup surveys (2018) related to the top organizational issues facing public school district leadership list crafting policies to educate better and prepare students, budget management, and recruitment and retention of teachers. These issues persist partly because national and Texas-based principal and superintendent training programs do not clarify or focus organizational management practices to support educational leaders on knowledge beyond instructional-centered practices needed to create sustainable organizations (Starling et al., 2021).

Barriers to Leadership Development. Leadership development is not innate in K-12 public education outside the traditional academic-focused paradigms that can ignore the social components of a complex system of tiered leaders and followers (Houmanfar et al., 2018).

Educational leaders must create and articulate a vision to create meaning and action for an organization (O'Reilly & Chatman, 2020), but the development of leadership skills needed to focus beyond organizational vision-making and work in the realm of follower behaviors and groupthink requires deliberate action that the leader often undermines (Nordback & Espinosa, 2019).

Followers belong to ingroups and outgroups, but so do leaders. With leaders in K-12 cabinet positions, the pains of ego, self-interest, and lack of self-awareness can cripple leadership development aimed at individual and organizational improvements (Zlatev et al., 2016). K-12 leadership development necessitates adopting an SIT lens to address leader-follower exchanges perceived as problematic, particularly concerning power struggles and threats to power positions (Rothstein, 2022). Leadership should not be romanticized but instead seen as a social process that evolves through the active involvement of everyone within an organization (Schweiger et al., 2020). Organizations do not need a heroic leader but one rooted in collective work, collaborative communication, and consensus (Tourish, 2019).

Current leadership ideals related to transformational leadership focus on the acts of the individual leader (Steinmann et al., 2018) and might misrepresent the complicated, layered processes of a K-12 public education system and cabinet leader approach to leadership. Leadership is a socially constructed phenomenon that requires a leader to understand the dynamic social interactions and fluid relations that can create ambiguity and conflict within an organization (Tourish, 2019). However, educational leaders today suffer from an inability to transform preconceived ideas of leadership and reshape intrapersonal and interpersonal aptitudes aligned with ego-centered practices that undermine processual leadership enhancements (Schweiger et al., 2020).

Leadership Clone Theory. As a crucial organizational factor, leadership influences all systems, climates, and cultures, yet its relationship with the organization's influence on leadership is frequently misunderstood (Oreg & Berson, 2019). Often, new leaders are selected based on SIT (Hogg, 2018) and how they fit the current group they are expected to lead. Without proper self-perspective, guidance, and an understanding of group dynamics, a newly appointed leader can fall prey to complex situations that manipulate their development (Shufutinsky, 2019). A process known as leadership cloning can take place where the new leader mimics current leadership practices, which can increase resistance and self-interest among individuals and their groupings (Metz, 2020).

Leadership cloning and its possible adverse effects is a barrier to K-12 public educational leadership. Effective educational leadership is in a state of crisis due to a shrinking talent pool and increased demands placed on individuals entering the profession (Zepeda & Ponticell, 2019). At the cabinet and superintendent level of Texas K-12 public education, there was a 2% higher resignation rate than the national average, and the hired replacements had no previous superintendent- or cabinet-level experience (McMurdock, 2022). Increased training in identity leadership would help offset the issues brought forth by a fragile and volatile social identity culture. The pressures of social and political tensions in Texas that have seen school board wars over issues of critical race theory, banned library books, proposed parent bill of rights, teacher shortages, and an increase in the discrediting of public education are at the root of leadership turnover (Lopez & Cobb, 2022).

The best way to combat these divisions in identity politics is to understand better identity leadership, organizational groupings, and LMX processes' power to build an organization's resiliency (Duchek et al., 2020). Human nature is to retreat to tribalism when threatened by uncertainty, which causes a more insular, less accepting, more defensive organization and spurs the us-versus-them mindset (Chua, 2018). When leaders fail to address threats to group interests and information, concepts of sound reasoning, judgment, and organizational commitment are compromised (Kahan et al., 2017). As K-12 leaders leave the profession, they are leaving behind organizational structures that may continue to be unable to adjust to the changing social and political climates.

Summary

Current research has suggested that a K-12 public education is experiencing leadership burnout attributed to the dissatisfaction and disillusionment of school administrators brought on by organizational culture and in-place leadership tendencies (DeMatthews et al., 2021). Leadership burnout in K-12 public education can be correlated to the impact that cabinet-level leadership has on an organization's culture and the influence that culture has on the development of leaders and group members. Specifically related to this is cabinet leaders' inability to recognize that beyond prototypical perceptions of leadership, there needs to be an understanding of the behavioral and social influence of being a leader. As Haslam et al. (2021) explained, leadership is not just representing a given group; a leader must also create, advance, and embed a shared social identity. When a leader creates a shared social identity and understands that they are a member of the same group, groups work towards emerging group norms and act collaboratively to advance and accomplish group goals (van Dick & Kerschreiter, 2016). The problem is that K-12 public educational leadership does not fully reflect, represent, and realize (Haslam et al., 2021) the importance of the social identity approach to leadership in building effective organizational structures that support leadership development and group salience.

Chapter 3: Research Method

The purpose of this qualitative case study was to explore K-12 cabinet-level leaders' perceptions of how their attitudes and behaviors influenced intergroup and intragroup identities. The study explored the role positive LMX practices at the cabinet level of K-12 public education have on collective and individual organizational behaviors. I investigated cabinet-level leadership roles through the lens of SIT. Through research-based practices of a case study design, the results of this study focused on K-12 public school identity leadership practices and how intergroup and intragroup followers responded.

The purpose of this chapter is to introduce the research methodology for the qualitative case study approach regarding the effectiveness of K-12 public school district cabinet-level administrations in navigating intragroup and intergroup identity as they worked to create positive LMX dynamics for themselves and their followers. This study sought to answer the following research questions:

RQ1: How do positive leader-member exchange practices and behaviors influence collective organizational behaviors in a K-12 public education organization?

RQ2: How do followers' perceptions of leadership practices and behaviors influence their self and collective identities?

RQ3: How are purpose-aligned outcomes affected by identity leadership in K-12 public education?

The case study approach provided insight into leader and follower experiences. The data collected using the case study approach added to the current body of research regarding social identity leadership in K-12 public education. This chapter outlines the research design and methods I used to help answer the research questions detailed in this study.

Research Design and Method

Qualitative research allows a study to investigate the understandings and experiences of individuals and organizations and the significance that these interactions produce (Mason, 2018). In this study, I was concerned with the leadership practices in a K-12 public school organization and producing in-depth information to better understand the dimensions of the social leadership problem observed within the organization. As Maxwell (2013) argued, qualitative research is more suitable for exploring beliefs, attitudes, and relationships that cannot be easily quantified or reduced to objective operational variables, unlike quantitative research. In my investigation of leadership perceptions, qualitative methods were better at exploring organizational practices in obtaining a deeper understanding of real-life phenomena (Yin, 2009).

Real-life context and an examination of individually constructed realities as it relates to perceptions of social leadership in the K-12 public school organization was the reason I selected a qualitative case study approach. Reviewing a bounded phenomenon in the selected K-12 public education organization allowed for a holistic and intensive analysis of the identified problem (Merriam, 2010). While Yin, Stake, and Merriam have all expressed subtle differences in case study methodology, the basic tenets encourage using a case study to cover contextual conditions related to a phenomenon (Cleland et al., 2021). The strategy behind selecting a case study was to investigate a particular phenomenon, in this case, cabinet-level leadership practices in a South Texas public school system, and the ability to use empirical investigation within a real-life context (Robson & McCartan, 2016). A case study is an integrated system combining interviews, artifacts, and observations (Gehman et al., 2018) to better understand individual events in the context of organizational and political processes (Gephart & Saylors, 2020). Case study research design is used to study management and operational leadership (Gephart & Saylors, 2020) due to the ever-changing dynamics of leadership research and the need for theory-building perspectives that case studies can provide (Goffin et al., 2019).

This qualitative research study could have used a narrative approach, phenomenology, grounded theory, or ethnography, but the qualitative case study approach allowed me to give a voice to the participants by capturing the detailed narratives and feelings associated with leadership styles and follower identities (Jamali, 2018). I considered quantitative and mixed-method research options. These methods required systematic investigations using statistical data to measure and quantify research theory (Hoy & Adams, 2015). Qualitative research allowed for a better investigation of the leadership qualities not as data sets of numerical predictions but as an introspective process that describes moments and meaning to understand experiences and meaning applied to human context (Kalof et al., 2008). Quantitative methods were better at studying unambiguous questions and where data collection is used to isolate, define, and quantify the studied environment (Stockemer, 2023).

I reviewed other qualitative designs for this public. An ethnographic approach has similar interpretive perspectives as the case study approach, but the purpose of an ethnographic study is to describe the phenomena and not seek an explanation of observed phenomena (Harwati, 2019). The grounded theory approach seeks to analyze data to generate a theory (Pieterse, 2020), whereas in this study, I hoped to analyze and provide an in-depth understanding of a known theory applied in a different environment. I applied an exploratory and descriptive case study approach to this research because the goal was not to predict outcomes while describing an observed leadership phenomenon of K-12 public school cabinet leadership (Guetterman & Fetters, 2018).

As Yin and Campbell (2018) found, the process of data collection through interviews, focus groups, and artifact collection allows a review of the real-world context where the researcher has little control while providing support for a robust understanding of the how and why of participant perspectives (Jamali, 2018). The case study was bounded by the conditions of the South Texas K-12 public school district and the 12 cabinet-level leaders and their direct reports through interviews, observations, and artifact reviews over three months. The study examined relational leadership attitudes and behaviors, the perception of intergroup and intragroup interactions, and the organizational climate and culture.

Population

This case study examined one K-12 South Texas suburban school district to address a phenomenon of cabinet-level leadership's inability to mitigate organizationally disruptive ingroup dynamics occurring in many Texas public school districts. The chosen school district had a moderate size and diversity of community, which allowed for multiple leadership interactions relevant to the case study. Table 1 highlights how the selected district aligns with the State of Texas data reports for all school districts when looking at school district organizational data. Table 1 highlights this similarity in organizational data points and supports the selection of this district for the single-case study as an average representation of Texas school districts when looking at administrative experience, percentage of district-level leadership, and teacher retention, all aspects of organizational structure that are relevant to the single-case study and the problem identified for this study.

Table 1

Case Study School District Organizational Data

Organizational data	Case study district (%)	State of Texas district data (%)
Staff 21–30 Years of Experience	12.2	13.2
Average Years Experience of Administration	6.5	6.3
Central Administration Percentage of District Staffing	0.9	1.2
Teacher Turnover Rate	12.8	17.7

Note. Adapted from Texas Education Agency's 2020 TAPR Report.

The population this study intended to support is central administrative leaders in Texas K-12 public schools. Texas has 1,250 public school systems, with over 5,000 central administrative leadership positions. The target population of the case study was the cabinet and their direct reports of a single South Texas K-12 public school system. Cabinet-level leadership refers to district-level leaders who often carry the title of assistant superintendent, chief operating officer, or executive director. These leaders are not campus-based because the purpose of the study was to review upper echelon leadership attitudes and behaviors and how they might influence intergroup and intragroup identities for the organization.

The target population included 12 men and women who hold advanced degrees and mid-management, principal, or superintendent certifications. The identified participants had more than five years of district-level leadership experience in the public education system. The sample was a mixture of ethnic backgrounds and ranged in age from 38 to 67. The target population worked in a K-12 public education district that consisted of 23 campuses that served roughly 21,000 students. The sample taken from the central administration of this K-12 public school system consisted of four cabinet-level administrators and two director-level leaders they supervised who service campus leadership and instruction. This created 12 case study participants, four in leadership roles and eight in follower roles. The district granted site authorization (see Appendix A) through an approved IRB process (refer to Appendix B).

The organization's current structure was a traditional hierarchical design with a specific chain-of-command approach to communication and supervision. The cabinet-level leaders were assistant superintendents, chief operation officers, or executive directors with master's and doctoral degrees in educational administration. As previously noted, recent research indicates that transitioning from traditional hierarchical leadership to cross-functional shared practices can face obstacles due to leaders' perspectives on organizational structure and practices (Forsten-Astikainen et al., 2017). Drawing from this target population creates a better understanding of the challenges related to leadership style and the navigation of group identities correlated with individual and collective self-protection mechanisms.

Study Sample

This study utilized purposeful sampling of four cabinet-level leaders and eight direct reports, two from each cabinet-level leader. I selected this sample population because of their roles as district-level leaders and the variety of departmental functions they guide and supervise. The hierarchical structure at the district level created a complex organizational structure influenced by bureaucratic behaviors and required adaptive problem-solving practices and immediate decision-making mechanisms that influence group interaction and effectiveness (Baltaci & Balcı, 2017). The purposeful sampling of these K-12 public school leaders allowed me to interview and observe individuals with characteristics and experiences that fit the purpose of the study.

Following Abilene Christian University's IRB approval, I emailed prospective participants and provided informal communication outlining the study's purpose and process. As Shaheen (et al., 2019) explained, purposeful sampling was helpful in this context because it allowed for selecting information-rich samples, which I determined had an in-depth view of the identified problem. While purposeful sampling was a nonprobability sampling method, it had the potential for a high level of bias but the benefit of using the intuitive approach in the identified social-cultural situation. Current research supported the sampling process despite the lack of ability to generalize the data due to the limited number of primary sources (Shaheen et al., 2019). Understanding that several purposeful sampling strategies existed, I selected the *criterion-I strategy* based on the predetermined criteria of cabinet-level leadership in a K-12 public educational organization (McCroskey et al., 2019). As a purposeful sampling strategy, criterion-I sampling allowed the selection of individuals based on the assumption that they had knowledge and experiences with the described phenomenon and could provide depth and breadth during the information-gathering phase (Palinkas et al., 2015).

In utilizing purposeful sampling, I also considered the need for data saturation. A researcher reaches data saturation when the data collected do not reveal new information, there is enough data to draw necessary conclusions, or there is a perceived point of diminishing returns (Fusch & Ness, 2015). The research questions regarding the purpose of the study lent themselves to support the sample size taken from the targeted population and reached data saturation for this bounded case study. All cabinet-level and direct reports participated in the study, and the sample size was 12 individuals, with four cabinet-level leaders and eight department-level leaders. If participants elected not to participate, an alternative pool of cabinet leadership and direct reports from the same public school district could have joined the study. The case study participants were identified as Cabinet Level Participant 1 through Cabinet Level Participant 4 (CLP1–CLP4) and Direct Report Participant 1 through Direct Report Participant 8 (DRP1–DRP8).

Materials/Instruments

The case study used interviews, observation, and organizational artifacts to gain insight. I interviewed four cabinet-level leaders, and two of each cabinet leader’s direct reports were interviewed using semistructured, open-ended questions to explore leadership experiences related to social identity leadership and intragroup and intergroup cultural and communication developments. In addition to the interview responses and reflection, the need to use observational data of persons and artifacts was important because it allowed me to draw inferences that were not apparent in the interview and which supported data validity through triangulation (Deggs & Hernandez, 2018).

Data Source 1: Interviews

Research considers interviews the best method to collect data for qualitative studies (Merriam & Tisdell, 2016). In interviewing the cabinet-level leaders and their direct reports, I utilized a semistructured interview format to allow for greater flexibility to probe participants and gain greater insight into the research problem related to social identity leadership practices (Patton, 2015). Creating an interview guide helped format questions aligned with the research purpose and provided a reflective process for the researcher and the participants (Smith & Nizza, 2022). The goal was to allow the interview questions to elicit descriptive and narrative participant experiences related to organizational leadership practices. I created the interview guide protocol (Appendix E) using the interview protocol refinement (IPR) framework, which enhanced the value of data and the study's trustworthiness through inquiry-based conversation, feedback, and interview alignment (Castillo-Montoya, 2016). The IPR's four-phase process helped me develop an appropriate and congruent interview instrument (Castillo-Montoya, 2016). The process involved ensuring interview questions aligned with the research framework and producing inquiry-based conversations. The end goal of the interview process was to elicit meaningful and useful understandings from the articulate perspectives of the participants (Patton, 2015).

The SIT framework guided the development of interview questions, which drew influence from social identity leadership aspects to address the research questions. Research has demonstrated that SIT provides foundations for identity leadership and group dynamics, aiding in explaining how leadership behaviors influence group emotions, behavior, and attitudes (Hou et al., 2021). The capacity to represent, advance, create, and embed a shared social identity guides leadership influence (Haslam et al., 2021). The questions used for cabinet-level leadership and direct reports sought to explain how LMX, perceptions of leadership practices, and identity leadership affect followers' individual and collective behaviors. Using SIT, researchers identified four principles for effective leadership (Fransen et al., 2020) and these principles of representing, advancing, creating, and embedding guided the creation of the interview questions and alignment with overall research questions. I designed each interview question to elicit a response specific to one of the SIT framework principles detailed in the interview protocols.

Data Source 2: Observations

Observations in a case study allow the researcher to look and listen systematically to gather detailed descriptions and reinforce interview data (Smit & Onwuegbuzie, 2018). In this case study, I used observations to help gain a better understanding of the organizational culture and individual behaviors. Erdogan and Bauer (2016) argued that prosocial behavior can be observed and measured during meetings, and observations are an important form of behavioral data to support a multisource approach to research. The process of observations in qualitative research begins with determining the best site and garnering permission to be present to observe and document the phenomenon. Descriptive, reflective, and reflexive observational protocols are needed to collect field notes during observations effectively. I utilized an observation grid (Appendix F) to collect descriptive, reflective, and reflexive data points in alignment with the SIT and the identity leadership principles of representing, advancing, creating, and embedding (Haslam et al., 2021). This aided in interpreting the responses provided during interview sessions. The interview protocols were structured with questions intended to elicit responses related to the corresponding framework conditions of representing, advancing, creating, or embedding.

Due to my knowledge and experience with the district, maintaining a role as a complete observer was critical. The observation protocols helped focus my attention on collecting data aligned with the research problem. I focused my observational journaling on setting, people, behaviors, and actions aligned with identified SIT tenets of representing, creating, implementing, and embedding. After the set time frame of observing, I took the field notes and created an analytical narrative of the observed interaction.

Data Source 3: Document Review

Document review is a way to collect data and triangulate information by reviewing internal reports and records, confirming known understandings, or eliciting new meanings related to research questions (Corbin & Strauss, 2008). Using interviews, observation, and document reviews helped to create a convergence of information and data. The confluence of evidence was created through data triangulation and was necessary to support research credibility (Patton, 2015). Documents that I reviewed included meeting agendas, published handbooks and training material, internal memos, and social media items. All types of documents helped uncover meaning and found relevant insight into the research problem (Merriam, 2010). I reviewed the documents to ascertain if written and created artifacts supported interview and observational data or provided a contrary opinion on the perception of leadership and the effect of LMX on organizational group dynamics.

Field Testing of Instruments and Protocols

I conducted field testing to determine the accuracy of the data collection instrument and to ensure the tool collected the data I created it to collect. A run-through process of field instruments validates the process (Leavy, 2023). Educational experts reviewed the data collection process and instruments to ensure credibility and dependability. I conducted semistructured practice interviews with two school leaders under the conditions used in the data collection process. Formal consent was not obtained because IRB approval had not yet occurred. These were practice sessions, and no data were gathered. The two sessions gave feedback on my pace of questioning and the need to be slower to allow for engagement. These sessions also determined that the location of the interview could cause bias in responses, especially from follower responses regarding their supervisor. Moreover, the depth of some of the answers sparked tangent discussions and got the interview off-track of purpose. Suggestions were made to avoid being tied to the order of questioning, as some questions naturally lead to others. The prescribed order was found to make the conversation choppy and somewhat leading.

Data Collection and Analysis Procedures

Data Collection

This study used qualitative research strategies involving semistructured interviews, observations, and documents to gain in-depth information on the problem (Denzin & Lincoln, 2018). In the initial phase of the research, I sent an informal email to all identified participants to invite them to participate and inform them of the general outline and purpose of the research study (Appendix C). Open-ended, semistructured interview questions garnered participants' perspectives on organizational leadership (Queirós et al., 2017). Once individuals confirmed their participation in the interview process, they were provided with an informed consent form (Appendix D). Confirmed participants were assigned unique codes based on their administrative roles.

Interviews. In qualitative research, the interview should be structured in ways that elicit more than simple responses, and the researcher needs to build rapport with the participant to allow the answers to flow and provide insight that is descriptive of experiences and related to the purpose of the study (Saldaña & Omasta, 2017). Data collection from interview questions evolved during the interview process. It was key that the interviews were not leading and that the data were recorded and transcribed to ensure the study's validity.

I conducted the individual interviews in person, and they lasted approximately 45 minutes. The interviews were scheduled based on the availability of the participants. If a participant could not complete the interview process, new cabinet-level and direct reports would have been selected to ensure 12 total interviews. However, no alternatives were needed for this study. I audio-recorded individual in-person interviews via a digital recording device. The recordings were transcribed using Transcription Puppy. I then used the transcribed Word files for coding and thematic analysis. I provided all interview transcriptions to the participants for member checking, a process allowing them to review their interviews and correct any misunderstandings. To protect all participants, I labeled all data transcriptions by personal identifying makers using codes to adhere to the principles of do no harm (Belmont Report, 1978). All interviews, observations, and document reviews were saved under encryption and will be destroyed three years after the study's conclusion.

Observations. I also collected observational data. The process for collecting observational data followed the framework used in case study observational research (CSOR), where the nonparticipant observation was conducted before the interviews in a case study (Morgan et al., 2017). I took observational notes during shadowing events using an observational grid that focused on evidence related to the four aspects of SIT and leadership (Hou et al., 2021). I also shadowed each participant during selected team meetings. The observations of the group dynamic and LMXs took place in preselected monthly department meetings for 30 minutes starting at the beginning of the meeting. The participant selected the date and time for the process with the requirement that direct reports also attend the meeting.

Cabinet-level leaders participating in the study supplied two meeting dates that involved direct reports, organizational discussions, and decision-making. I selected one of these meeting dates to gather observational data. I did not participate in any of these meetings. I took observational notes to determine if leadership representation, creating, implementing, or embedding was visible during the meeting. The observation process began at the start of the meeting and lasted for 30 minutes. I took notes using the observation grid (Appendix F), focusing on leadership and follower communication, actions, and behaviors.

Documents. I reviewed other data sources—organizational charts, meeting agendas, and published standard operating procedures—to help with data triangulation. These documents, as products of individuals, reflected their values and beliefs. Analyzing documents supported qualitative research by manifesting meaning and aiding in interpreting latent content (Czerwinski, 2017). The goal was to have multisources of data to add depth to the data and validity to the participants' experiences (Fusch et al., 2015). Using a methodological framework based on Flick's (2018) four-factors consideration approach, I conducted an in-depth examination of context, authorship, content, and reception to uncover the intricate layers of meaning embedded within the documents, offering insights into organizational communication and structural dynamics.

Data Analysis

As I gathered, reviewed, and analyzed data, categories, and themes were revealed (Yin & Campbell, 2018). I also reviewed interview recordings before being transcribed using the Transcription Puppy online service. Participants then reviewed the transcriptions before the coding process began. As Weller et al. (2018) established, thematic analysis of coded transcribed data reveals themes that can be defined in alignment with the research problem. Coding was done using NVivo analysis software that used artificial intelligence and natural language processing to support breaking interview transcriptions into themes. Using coding software helped mitigate research bias (Feng & Behar-Horenstein, 2019).

Coding. Once the data collection process was complete, the important task of qualitative data analysis began. In this qualitative study, I analyzed the data through coding. Coding is a process that highlights themes and trends from data sources that allow for synthesizing information related to the purpose of the study (Saldaña & Omasta, 2017). NVivo is qualitative data analysis software employing the framework method (Ritchie & Lewis, 2003), a hierarchical thematic framework outlined in seven steps (Gale et al., 2013). I followed this method to determine the correlation between data collection and the research questions. Table 2 demonstrates how I employed the stages of the framework method (Gale et al., 2013).

Table 2

Seven Stages of the Framework Method

Seven framework stages	Application of process
Transcription	Create transcripts from audio files using Transcription Puppy
Familiarization	Review all audio and transcribed material
Coding	Use NVivo to code data
Develop a Working Analytical Framework	Begin grouping codes to create categories after the first three interviews and modify as additional codes emerge
Applying Analytical Framework	Use NVivo to support indexing aligned with the theoretical framework
Charting the Data into the Framework Matrix	Use NVivo to create data matrixes to help chart data through the examination and organization of nodes
Interpreting the Data	Explore data relationships to interrogate theoretical concepts

Note. Information adapted from Gale et al. (2013).

Data analysis in qualitative research requires rigor in the study, which builds trust and confidence in the data, interpretation, and methods (Pilot & Beck, 2014). In this study, a master list of codes was created in the software and the data were maintained at manageable levels to ensure a focus on the research questions. This process supported the study's credibility as the chain of command and process for internal and external review of collected data was a routine process. The audit trail of data collection and storage, member checking of transcribed interview sessions, and peer debriefings ensured the dependability and confirmability of these data. Through a well-written detailed account of the research process and data collection, the study was transparent and replicable to inform the reader of the application and importance of this study.

Interview Analysis. After each interview, I reviewed the transcription from the audio recordings and had them member checked. The transcription of the interviews allowed for the identification of the narrative revealed by the participants (Sutton & Austin, 2016). It was crucial during the transcription process to not inhibit the integrity of the data by avoiding any researcher bias or prejudgment of the data (Saldaña & Omasta, 2017). I read each transcribed interview twice to familiarize myself with the content, which helped me prepare a coding table aligned with the research framework. I designed the interview questions to elicit responses related to each principle of SIT, which allowed me to organize responses based on frequency and develop a master code list. After developing a master coding list, I uploaded the transcripts into the NVivo program. The NVivo software supported the identification of nodes taken directly from participant-transcribed responses. The nodes were identified based on the master code list aligned with this study's SIT framework and the ideas of representing, creating, implementing, and embedding identity. Categories began to emerge and after coding the first three interviews, I made any coding adjustments to ensure the validity of the process. The data were charted as codes and categories and analyzed against the theoretical framework and data matrixes used to examine themes and relationships found in the data.

Observation Analysis. Data analysis of observations was coded in the same manner as the interviews. Using the observation grid (Appendix F), I took notes during each 30-minute preselected team meeting. I manually reviewed and coded the notes in alignment with the SIT framework of this study. The transcribed observation notes were uploaded into the NVivo program, and coding allowed for the development of categories of data, which were indexed by themes found in the data and created data matrixes. The theoretical framework and similar master coding list used in the interview analysis supported data validity.

Document Analysis. With permission from ST District, I reviewed their organizational charts, meeting agendas, and operational handbooks. I familiarized myself with the documents and created codes based on patterns seen in the data. The identified codes, aligned with the study's framework, were grouped into themes. I organized and charted the themes revealed from these data as a third data source for triangulation.

Triangulation. Triangulation is a process of using multiple data sources to converge evidence related to the same phenomenon (Yin, 2009). Using three different data sources supported a multidimensional approach to data analysis and added to the credibility of the research process and findings (Saldaña & Omasta, 2017). I took data from interviews, observations, and document reviews, charted them based on the SIT framework, and identified themes related to research questions. The data triangulation process was used to ensure the accuracy of the findings.

Trustworthiness

Qualitative research requires the creation of trustworthiness for findings to be considered reliable and valid. Quantitative research terms of internal validation, reliability, and objectivity do not fit the paradigms of qualitative methods (Korstjens & Moser, 2017). Qualitative researchers seek trustworthiness when designing a study and analyzing data (Stahl & King, 2020). The criteria for the trustworthiness of research are credibility, transferability, dependability, confirmability, and reflexivity (Lincoln & Guba, 1985). Explaining these criteria for trustworthiness is important to ensure a quality case study.

Credibility holds significant importance in qualitative research due to its subjective nature. It ensures that the data and findings accurately reflect reality and contain truth (Stahl & King, 2020). This ensures that the research outcomes are trustworthy and valid. Transferability supports the fact that the findings from the study can be used in other situations and populations, while dependability allows other researchers to replicate the study to determine if the findings are consistent. Confirmability was a process that tried to bring some objectivity to this qualitative research by building audit trails to show that researcher bias or motivation remained neutral in data analysis (Stahl & King, 2020). These markers of trustworthiness were reflected in the study using data triangulation and member checks, thick descriptions of behavior and context, and maintaining a detailed audit trail.

The area of reflexivity to establish trustworthiness was crucial for me as a lone researcher due to my position and experience with public education. In this case study, as the researcher, I was aware of the potential for inherent bias and took measures to mitigate it. Qualitative research bias can develop from the respondent or the researcher (Merriam & Tisdell, 2016). My background, beliefs, and experiences could have influenced all research design and implementation aspects (Johnson et al., 2020). To help mitigate reflexive practices during research, I kept a journal of personal thoughts and beliefs that impacted data decisions to ensure that research preconceptions did not influence data collection and analysis (Johnson et al., 2020).

Ethical Considerations

As a novice researcher, I needed to complete the IRB training and adhere to the processes outlined for protecting human research participants. The ethical foundational principles of respect for persons, beneficence, and justice are outlined in the Belmont Report (1978), which guided this study to ensure respect for persons, proper use of informed consent, and understanding that confidentiality is paramount. Understanding that truth in interview responses could create professional conflict if exposed, the interview protocols and coding practices were designed to prevent participants' exposure. All data collected will be stored in encrypted and password-protected databases for three years following the completion of the study and then securely destroyed in accordance with university IRB policy. Explaining the purpose of this study to the participants and building a professional relationship of trust was important to ensure no harm while maximizing the benefits of the research. The participants were educational leaders and explaining the importance of the study to educational leadership and organizational development helped create a productive, sharing environment.

Mitigation of Bias

The subjective nature of qualitative research lends itself to criticism related to the respondent and researcher bias (Galdas, 2017). The role of the researcher is to mitigate bias to inform the credibility and trustworthiness of the research (Johnson et al., 2020). To avoid respondent and research bias, interview questions were indirect and open-ended, triangulation of data sources was used, and data validation occurred. I addressed my power dynamic and social knowledge through transparency of the research purpose, methods, and interpretations of data and ensured that the principles of ethics of care were demonstrated (Reid et al., 2018). I assured participants of the altruistic purpose of the research, that data were kept confidential, and that no harm would come from the production of the data. The reflexivity log helped keep me focused on managing multiple roles to mitigate power dynamics (Reid et al., 2018).

Assumptions

I assumed that the participants selected for this study would participate honestly and have a sense of purpose in giving reflective answers to support the single-case study. Purposeful sampling was used to gather the best representation of K-12 public school leadership at the cabinet level and their direct reports. I also assumed that the interview protocols and use of transitional questioning techniques allowed for the obtainment of reliable data. It was further assumed that the results from this research study supported K-12 public education leadership to better understand the impact of identity leadership practices for organizations and individuals.

Limitations

In qualitative research, limitations are areas in the study that cannot be controlled by the researcher (Terrell, 2022). The case study was narrow in scope and limited transferability. The focus on one South Texas school district with a specific demographic and diverse years of experience may not allow findings to be generalized. In addition to transferability limitations, credibility and confirmability were limited due to the sampling process and the possibility of participants' willingness to share due to the inability to avoid a social desirability or agreement bias.

Delimitations

Delimitations are factors controlled by the researcher (Terrell, 2022). The research revolved around the attitudes and behavior of upper-level leadership and their impact on organizational group dynamics. Research on leadership characteristics and influence is vast. However, I investigated cabinet-level leadership's impact on organizational group behavior in the study. The limited scope of participants at the cabinet level and direct report was a conscious choice to set specific response boundaries to maintain the focus of the study. The research boundaries were limited to public education due to state mandates and requirements. These bring organizational stress related to accountability not felt in charter schools and serve as unique conditions for leader-follower relationships.

The selection of the single K-12 public school district was also a research choice. I chose the ST District due to its organizational structure, size, and leadership design, which statistically aligned with district averages across Texas. This supports the generalization and transferability of the data.

Summary

The purpose of this qualitative case study was to understand how K-12 cabinet-level leaders' attitudes and behaviors are related to intergroup and intragroup identities. My primary goal was identifying how K-12 cabinet-level leaders' attitudes and behaviors influence intergroup and intragroup identities. Still, there is often a disconnect between human relations development and leadership skills. This chapter outlined the data collection, analytical methods, and the study's limitations. The case study targeted a South Texas school district's cabinet-level leadership team and their direct reports through data collection, including semistructured interviews, observations, and document analysis. Data analysis revealed trends related to social identity leadership practices and provided themes to address the research problem. In the next chapter, I report the data analysis and the data collection results.

Chapter 4: Results

In this chapter, I present and analyze the findings of the qualitative case study on the influence of the attitudes and behaviors of ST District cabinet-level leaders on intergroup and intragroup identities. The study explored how positive LMX practices impact collective organizational behaviors and contribute to social identity development among intergroup and intragroup followers. The chapter begins with an overview of the research methodology and data collection process before delving into the presentation and interpretation of the findings. This qualitative single case study explored how leaders' attitudes and behaviors influenced intergroup and intragroup identities in efforts to enhance collaboration among intergroup and intragroup followers. The data collected consisted of semistructured interviews with four cabinet-level administrators and eight of their direct reports. I obtained additional primary data through observations and document reviews to help determine if leadership representation, creating, implementing, or embedding of social identity was evident. The purpose of this study was to examine how positive LMX practices influence collective organizational behaviors and shape social identity among intergroup and intragroup followers. The following research questions guided the study:

RQ1: How do positive leader-member exchange practices and behaviors influence collective organizational behaviors in a K-12 public education organization?

RQ2: How do followers' perceptions of leadership practices and behaviors influence their self and collective identities?

RQ3: How are purpose-aligned outcomes affected by identity leadership in K-12 public education?

This chapter presents an overview of the data collection process and analyzes interview data, observation data, and organizational artifacts. The results of this study help explain how district leadership develops SIT frameworks to enhance collaboration among intergroup and intragroup followers, resulting in better organizational health and student success.

Descriptive Data

ST District leaders sat for semistructured interviews that focused on the dynamic between leader and follower and how leadership behaviors might impact creating, representing, and embedding social identities. The cabinet-level leaders and their direct reports had pseudonyms assigned for ethical and confidential purposes. Cabinet leaders were labeled CL, and direct reports were labeled DR, with corresponding numbers representing each individual.

The case study used purposeful sampling to ensure that the interviewees had more than five years of leadership experience in the public education system and that the sample had a mixture of ethnic backgrounds and ranged in age. Demographic data is represented in Table 3.

Table 3

Demographics Data and Profile: Cabinet Leadership and Direct Report

Participant pseudonym	Gender	Ethnicity	Years of district experience	Age	Highest degree level
CL1	F	White	18	56	Master’s
CL2	M	Black	18	43	Doctorate
CL3	F	White	23	45	Doctorate
CL4	F	White	20	54	Doctorate
DR1	F	White	17	53	Master’s
DR2	M	White	29	53	Master’s
DR3	F	White	19	43	Master’s
DR4	M	Hispanic	22	58	Master’s
DR5	F	Black	20	46	Master’s
DR6	F	Hispanic	6	45	Doctorate
DR7	F	Hispanic	6	34	Master’s
DR8	F	White	21	48	Master’s

The exploratory single case study was conducted at a traditional K-12 public school district in South Texas. Table 4 represents the district leadership profile for the ST District.

Table 4

District Profile

Grade levels	Student enrollment	# of campuses	Central administration positions	Campus administration positions	Average years of public-school leadership experience
Pre-K-12 Levels	21,154	23	21	69	6.7

Data Collection Process Review

Upon university Institutional Review Board (IRB) approval, I conducted twelve semistructured interviews following the interview protocol outlined in Appendix E. I used open-ended questions to explore perceptions of leadership style and group identity navigation among cabinet leaders and direct reports, potentially impacting individual and collective self-protection mechanisms and district goals. Participants completed signed consent forms received email confirmations of their scheduled interviews and were informed of voluntary participation. Additionally, participants agreed to audio recording and received verbatim transcripts for review. Subsequently, Transcription Puppy software transcribed recorded interviews, and the transcriptions were given to participants for member checking. Simultaneously, I collected observations that adhered to the case study observational research (CSOR) framework, focusing on leadership and follower interactions during predetermined team meetings.

The examination of organizational charts, meeting agendas, and standard operating procedures supported document data collection and offered insights into underlying values and beliefs. The study used a triangulation approach, integrating semistructured interviews, observations, and district documents to understand the research topic comprehensively. Semistructured interviews provided direct insights from cabinet-level leaders and direct reports, while observations captured real-time interactions during team meetings, complementing interview data. I examined district documents to gain additional context, ensuring a robust analysis and comprehensive exploration of the research problem. These diverse data sources enriched the depth and validity of the study’s findings, facilitating the formulation of codes and themes for analysis.

Data Analysis Procedure

During data analysis, categories and themes were created as data were collected and reviewed, following the guidelines outlined by Yin and Campbell (2018). I reviewed and transcribed all interview audio using the Transcription Puppy online service, allowing participants the opportunity to verify transcripts before coding began. The thematic analysis of the coded and transcribed data unveiled patterns aligned with the research problem, as Weller et al. (2018) suggested. NVivo analysis software facilitated coding, utilizing artificial intelligence and natural language processing to discern themes from interview transcripts, thereby mitigating potential research bias (Feng & Behar-Horenstein, 2019).

The coding process, a crucial component of qualitative data analysis, began once data collection concluded. Coding involves the identification of themes and trends within data sources, allowing for synthesizing information pertinent to the study’s objectives (Saldaña & Omasta, 2017). NVivo, a qualitative data analysis software, executed the framework method, which consists of seven stages outlined by Gale et al. (2013). These stages include transcription, familiarization with the data, coding, developing a working analytical framework, applying the framework, charting data into a framework matrix, and interpreting the data.

To ensure the rigor and trustworthiness of the study, a master list of codes was established in NVivo, managing data at manageable levels to maintain focus on the research questions. Routine processes for internal and external review of collected data, including a chain of command and procedures for member checking of transcribed interviews and peer debriefings, enhanced the study’s credibility, dependability, and confirmability. The detailed account of the research process and data collection allowed transparency and replicability, enabling readers to understand the study’s application and significance.

Interview Analysis

The transcription service transcribed the audio recordings after each interview to capture the participants' narratives, as Sutton and Austin (2016) advocated. Maintaining the integrity of the data during transcription was imperative to minimize researcher bias or prejudgment, following recommendations from Saldaña and Omasta (2017). Each transcribed interview underwent two reviews to ensure familiarity with the content and to prepare a coding table aligned with the research framework. Table 5 provides an overview of the interview process for this single case study.

Table 5

Interview Time and Participant Data Collected

Participant pseudonym	Duration of interview	Transcribed pages
CL1	26 minutes	8
CL2	27 minutes	9
CL3	44 minutes	13
CL4	31 minutes	7
DR1	39 minutes	8
DR2	41 minutes	10
DR3	28 minutes	7
DR4	48 minutes	15
DR5	32 minutes	9
DR6	34 minutes	9
DR7	33 minutes	10
DR9	27 minutes	8

The interview questions were intentionally designed to prompt responses related to SIT and LMX theory, facilitating the organization of responses based on frequency to develop a master code list. After establishing this master coding list, the transcripts were uploaded into NVivo software. NVivo assisted in identifying nodes derived directly from participant-transcribed responses. These nodes were aligned with the master code list, reflecting the LMX and SIT framework and the concepts of representing, creating, implementing, and embedding identity.

Once acquainted with the datasets, the open coding phase commenced. Open coding involves breaking down the data into smaller segments, or codes, and grouping similar codes to form initial categories. During this phase, I identified patterns and trends within participant responses and documents, which led to the emergence of initial codes. Categorizing the cabinet-level interviews (Appendix G) and direct report interviews (Appendix H) separately was deemed essential. The purpose of the single-case study was to gain insight into the LMX dynamic and understand how it impacts SIT in the organization. To effectively see this in the data, the cabinet member and direct reports' responses were viewed independently to see alignment or diverging patterns.

Through an in-depth exploration guided by the theoretical framework of SIT, the initial codes gradually evolved into more refined categories. This process involved organizing the data into a coherent framework that captured the complexity of the single-case study. Initially, the data underwent transcription and coding, with repeated phrases and words highlighted and color-coded within a Microsoft Word document to identify emerging categories. As the analysis progressed, I made coding adjustments after coding the first three interviews to ensure the validity of the process.

The emergence of categories was connected to the theoretical underpinnings of SIT. These categories encapsulated the nuances of identity construction and societal categorization, shedding light on how individuals navigate and resist prevailing norms. I further analyzed the data against the theoretical framework, using data matrices to examine themes and relationships within the dataset. This comprehensive approach enhanced the depth of analysis and interpretation, revealing the intricate interplay between social categories, identity formation, and individual agency.

The categories developed independently for cabinet-level leadership (Appendix I) and direct reports (Appendix J). To further refine the analysis and generate initial themes, NVivo was employed to assist in thematic analysis. This software effectively organized and sorted a wide range of initially coded data and identified central themes and potential subthemes. The objective of this part of the process was to distill the data into coherent and concise themes to provide a structured representation of the findings.

Defining and Naming Themes. During this research phase, potential themes underwent a comprehensive analysis to refine and redefine the naming conventions associated with overarching themes and subthemes (Braun & Clarke, 2006). This meticulous process played a pivotal role in succinctly capturing the fundamental essences encapsulated within each thematic category. A continuous review of participants' quotes, organized within the NVivo software, supported this process. Final themes emerged from a systematic approach to coding, categorizing, and synthesizing the data. Notably, descriptive or interpretive codes were assigned to segments of interviews, crucially encapsulating the underlying meaning inherent within the dataset.

The data coding process facilitated the identification of discernible patterns and recurring themes, enabling the aggregation of single codes into cohesive clusters and highlighting interrelationships. Subsequently, these coded segments underwent categorization, refining category labels to ensure a faithful representation of the content. Throughout this iterative process, diligent comparisons existed between newly acquired data and previously coded information. This practice ensured consistency across the analysis and aided in identifying subtle nuances inherent within the dataset.

Reflexivity was a cornerstone principle, prompting a critical examination of researcher biases and preconceptions. This introspective approach ensured that interpretations remained firmly grounded in the empirical data rather than influenced by personal assumptions or predispositions. After analysis and categorization, the most salient and meaningful themes emerged from the dataset representing the responses of both groups of interviewees (Table 6). These final themes serve as a cohesive framework for interpreting the data, encapsulating the key insights and findings from the case study analysis.

Table 6

Final Themes From Coded Interviews

Initial themes	Final themes
Proximity Facilitates Communication	Communication Facilitation and Quality
Effective Communication Channels	Trust and Respect
Mutual Respect and Trust	Communication Challenges
Two-Way Communication and Listening Deficits	Organizational Alignment and Tradition
Importance of Feedback Loop	Team Dynamics and Equity
Alignment With Organizational Goals and Tradition	
Sense of Belonging and Support With Team	
Concerns about Favoritism and Fairness	
Maintaining Fairness in Recognition and Rewards	
High Trust in Leadership Decisions	
Roles and Gender Stereotypes	
Ingroup Dynamics and Collaboration	
Trust Building Effort	
Emotional Challenges and Decision-Making	
Mediation and Conflict Resolution	
Formation of Relationships With Various Leaders	
Emphasis on Trust	
Individualized Consideration and Transparency	
Task-oriented yet Supportive Leadership	

Defining the final themes as they relate to this single-case study was essential. I derived the definition or understanding of the terms from the information provided in both sets of interviews. The final themes were defined as follows:

Theme 1: Communication Facilitation and Quality. This theme refers to the processes and standards implemented to enhance the effectiveness and excellence of communication within an organizational context and involves the removal of barriers and obstacles that hinder effective communication, such as language barriers, technological constraints, or hierarchical structures.

Theme 2: Trust and Respect. This theme refers to the foundational elements of interpersonal relationships within an organizational context. These terms encompass individuals' beliefs, perceptions, and attitudes toward their colleagues, supervisors, and the organization.

Theme 3: Communication Challenges. This theme refers to the barriers, issues, or complexities that hinder effective organizational communication. These challenges may arise from various factors, including organizational structure, culture, technology, interpersonal dynamics, and external influences.

Theme 4: Organizational Alignment and Tradition. This theme refers to the customs, practices, rituals, values, and beliefs established and perpetuated within an organization over time. Organizational tradition shapes the organizational culture and identity, influencing employees' attitudes, behaviors, and norms.

Theme 5: Team Dynamics and Equity. This theme refers to the communication, collaboration, and interaction patterns within a group of individuals working towards a common goal. Team dynamics encompass various elements, including team structure, roles and responsibilities, leadership styles, communication patterns, conflict resolution strategies, and decision-making processes.

Observation Analysis

Researchers chose participants for this study from various levels within the selected school district, including four cabinet-level leaders and eight direct reports. Each participant consented to shadowing during selected team meetings, enabling direct observation of group dynamics and LMXs. I conducted observations of the group dynamic and LMXs during preselected monthly department meetings. Cabinet-level leaders chose the date and time for the observation process, understanding that their direct reports would be in attendance. I did not participate in these meetings but began taking observational notes at the start and continued for 30 minutes.

Observational notes collected during the meetings were analyzed to identify patterns and themes related to leadership dynamics and LMXs. The observation grid presented a structured SIT framework for categorizing and interpreting the observed behaviors, enabling systematic data analysis. Observing preselected department meetings, descriptive, reflective, and reflexive notes were instrumental in capturing various aspects of leadership behaviors and group dynamics, particularly concerning the SIT identity framework: representing, creating, implementing, or embedding. The description of the SIT framework (Haslam et al., 2021) used to describe the observed organizational identity development is represented in Table 7.

Table 7

Description of SIT Framework

Stage of SIT framework	Description of organizational identity development
Representing	Current representation of the department's identity through branding, messaging, and communication strategies.
Representing	Analysis of how the department is perceived internally and externally.
Creating	Process of defining and shaping the department's identity based on its mission, values, and vision.
Creating	Development of strategies to align organizational identity with stakeholder expectations.
Implementing	Execution of plans and initiatives to reinforce and strengthen the department's identity.
Implementing	Integration of identity-building efforts into daily operations and practices.
Embedding	Institutionalize the department's identity into its culture, policies, and practices.

I used descriptive notes to provide a detailed account of observable behaviors and interactions during the meetings. These notes focused on documenting specific leadership actions, such as who spoke, decisions made, and how to address conflicts. The descriptive notes highlighted instances where leaders actively represented their identity by articulating organizational values or asserting authority in decision-making processes. This data served as the foundation for understanding the surface-level dynamics within the meetings.

Interpreting the observed behaviors considering the SIT framework constituted reflective notetaking. I reflected on how the actions and interactions during the meetings reflected the identity of the leaders and the organization. The reflective notes supported the analysis of how leaders' actions contributed to creating a shared identity among team members or how implemented decisions reinforced organizational values. By examining the observed behaviors through the lens of social identity, reflective notes provided more profound insights into leadership actions' underlying motivations and implications.

The observational reflections and insights on the observation process comprised reflexive notes. I critically reflected on my biases, assumptions, and interpretations that may have influenced my observations. Additionally, reflexive notes included considerations of my role in the observation process and how my presence may have affected the dynamics within the meetings. By engaging in reflexivity, I enhanced the rigor and credibility of their observations and minimized potential biases.

Observations of preselected department meetings, including descriptive, reflective, and reflexive notes, offered a multifaceted understanding of leadership behaviors and group dynamics within the context of the SIT framework. These notes facilitated the exploration of how leaders represented, created, implemented, or embedded organizational identity during meetings, contributing to a comprehensive analysis of leadership processes within the organization.

I then cross-referenced themes and insights derived from observational data with data gathered from interviews and document analysis to provide a comprehensive understanding of leadership processes within the organization.

Table 8

Analysis of Observed Meetings Using SIT Framework

Cabinet-level leader meeting	Representing	Creating	Implementing	Embedding
CL1	Positive discussion among participants about the department's values and mission.	Active participation in brainstorming sessions to define the department's identity.	Commitment to implementing identity-building initiatives was discussed during the meeting.	Embedding the department's identity into departmental culture and practices.
CL2	Perception of the department as hierarchical and resistant to change among team members.	Limited participation from team members due to perceived need for more openness to new ideas from the leader.	Limited commitment to implementing identity-building initiatives due to perceived lack of support from the leader	Embedding the department's identity into departmental culture and practices hindered by leader's preferences.
CL3	Direct reports expressed feeling heard during the meeting, contributing ideas and perspectives openly.	Robust discussion on strategies for aligning departmental identity with stakeholder needs, incorporating input from direct reports.	Seamless integration of identity-building efforts into daily departmental practices, reflecting alignment with direct reports' input.	Embedding the department's identity into departmental culture and practices facilitated by direct reports feeling heard.
CL4	Organizational silos evident during the meeting, with limited cross-departmental collaboration and sharing of ideas.	Challenges in developing alignment strategies due to lack of input collaboration	Hindered implementation of identity-building initiatives due to silos, resulting in disjointed efforts and limited impact.	Embedding the department's identity into departmental culture hindered by silos and lack of cohesion.

Document Analysis

In this single case study, I utilized Flick's (2018) four-factor consideration approach as a systematic framework to analyze documents alongside interview and observational data, thereby facilitating the triangulation of findings. First, I applied the context factor to understand the broader organizational setting for document production, shedding light on historical, cultural, and social influences shaping their content. Second, I considered authorship to assess the credibility and perspective of document creators, providing insights into potential biases or motivations underlying the information presented. Third, I conducted content analysis to identify the documents' themes, patterns, and critical messages, complementing interview and observational data by providing additional contextual richness and depth. Finally, I employed reception analysis to explore how stakeholders interpreted and utilized the documents, helping to corroborate or challenge insights gleaned from interviews and observations.

By integrating Flick's (2018) four factors consideration approach with interview and observational data, this triangulation methodology facilitated a comprehensive and nuanced understanding of the case study phenomenon, enhancing the validity and reliability of the research findings. I reviewed documents to assess their alignment with interview and observational data concerning the perception of leadership and the impact of LMX on organizational group dynamics through the lens of the SIT framework. A systematic analysis examined the documents to ascertain whether written and created artifacts corroborated or presented a contrary opinion regarding the identified themes. The review focused on key thematic areas, including Communication Facilitation and Quality, Trust and Respect, Communication Challenges, Organizational Alignment and Tradition, and Team Dynamics and Equity. A comprehensive understanding of the interplay between leadership perception, LMX, and organizational dynamics was achieved by synthesizing findings from the document review alongside interview and observational data. This integrated approach allowed for a nuanced exploration of how written artifacts reflect or challenge perceptions of leadership and influence group dynamics within the organization.

Through a framework centered on context, authorship, content, and reception, the document review process aimed to uncover the intricate layers of meaning embedded within the selected public school district documents, offering valuable insights into organizational communication and structural dynamics. Department documents, such as organizational charts, meeting agendas, and standard operating procedures, serve as essential artifacts that reflect and shape organizational practices, values, and structures.

After examining the documents, I conducted triangulation to validate the findings. This phase emphasized assessing the utility of the documents with the document protocols, as detailed in Table 9. This approach ensured a comprehensive understanding of the data and its alignment with the theoretical underpinnings of the study.

Table 9

Document Review Alignment to Themes

Department documents	Alignment of themes
CL1 Meeting Agenda	The agenda items demonstrate varying degrees of alignment with the provided themes, emphasizing the importance of effective communication, transparency, organizational alignment, and teamwork.
CL2 Meeting Agenda	The agenda items show alignment with communication, trust and respect, and organizational alignment and tradition. However, there is a lack of explicit focus on addressing communication challenges or ensuring equity within team dynamics.
CL3 Meeting Agenda	The agenda covers various topics relevant to education and accountability within the school district. While there is alignment with communication facilitation, trust and respect, and organizational alignment and tradition, addressing communication challenges and promoting equity within team dynamics could further enhance the effectiveness of district operations.
CL4 Meeting Agenda	The agenda had areas of concern, including potential issues related to communication clarity, transparency, and collaboration, which could impact trust, respect, and organizational alignment within the school district.
District Planning Document	Each section of the document aligns with communication facilitation and quality, trust and respect, organizational alignment and tradition, and addresses relevant aspects of professional development, curriculum, assessments, teacher support, and district-wide initiatives within the school district.
Published Operating Procedure	The document demonstrates alignment and misalignment with the provided themes, focusing on improving communication quality, addressing organizational challenges, and fostering trust and respect within the district and community.

Note. Taken from document review of district-provided material.

This single case study's data collection and analysis process involved three main methods: interview analysis, observation analysis, and document analysis. During interview data collection, researchers emphasized open-ended, semistructured questions to gather rich perspectives on organizational leadership, conducting them in person and recording them for transcription. I meticulously reviewed transcriptions of participant interviews to identify narratives related to SIT principles and aligned coding with the SIT framework. Additionally, I coded team meetings' observation data using an observation grid while reviewing organizational documents to supplement data triangulation. Data analysis procedures, including transcription, coding, and thematic analysis, were conducted using NVivo software and the framework method to ensure rigor and transparency. Trustworthiness measures such as member checking and data encryption were implemented to uphold credibility and confirmability. Triangulation of data from interviews, observations, and document review enhanced the validity and depth of the findings, contributing insights to the field of organizational leadership and SIT.

Findings Answering the Research Questions

The aim of the qualitative case study was to better understand how attitudes and behaviors of K-12 cabinet-level leaders impact intergroup and intragroup identities. Specifically, it explores how positive LMX practices influence collective organizational behaviors in a South Texas K-12 public school district. This section explores the analysis of the interviews, observations, and documents and sees how they align and answer the research questions that focus on understanding the influence of leadership practices on collective organizational behaviors, followers' perceptions of leadership on their identities, and the impact of identity leadership on purpose-aligned outcomes in K-12 public education. This study sought to answer the following research questions.

Research Question 1

RQ1 asked the following: How do positive leader-member exchange practices and behaviors influence collective organizational behaviors in a K-12 public education organization? The three data sources were reviewed from the perspective of the cabinet-level leaders and their direct reports. This was important to ensure that the perspective of both leader and follower were captured, understood, and could be applied to better understand the LMX dynamic at play in the organization and how it impacted social identity because it directly addresses the study's purpose of gaining a better understanding of how positive LMX practices and behaviors influence collective organizational behaviors in a K-12 public education organization. In Table 10, the case study data collectively provide insights into how positive LMX practices and behaviors influence collective organizational behaviors in a K-12 public education organization, highlighting the impact of leadership dynamics, communication, collaboration, and organizational culture on the development and alignment of organizational identity.

Table 10

LMX Practices and Influence on Organizational Behaviors

LMX actions found in data	Influence on organizational behaviors
Positive Discussion about Values and Mission	Reflects a cohesive and shared identity among members, fostering collective alignment.
Perceived Positive Reputation	Indicates a strong sense of identity and alignment with organizational goals and values, positively shaping organizational behaviors.
Active Participation in Defining Identity	Reflects a collective effort to shape and reinforce the department's identity, fostering cohesion and commitment.
Agreement on Alignment Strategies	Demonstrates a shared understanding of alignment and responsiveness to external expectations, positively influencing organizational behaviors.
Commitment to Implementation	Indicates a collective willingness to take action, positively impacting the department's identity and organizational behaviors.
Integration into Daily Practices	Reinforces the importance of consistently reinforcing the department's identity in day-to-day operations, shaping organizational behaviors.
Discussion on Embedding Identity	Reflects a proactive approach to ensure sustained and deeply rooted organizational identity, positively influencing organizational behaviors.

Note. Taken from case study interview and observation data.

Interview responses supported by observational data indicated that proximity facilitates open communication but may lead to perceptions of favoritism. In the context of positive LMX practices and behaviors, the direct report interview data explicitly highlighted how a strong relationship with supervisors, characterized by trust, collaboration, and clear communication, fosters ingroup dynamics and aids in breaking down silos. However, it also pointed out that proximity, while facilitating open communication, may lead to perceptions of favoritism.

This aligned with the understanding that close physical or relational proximity between leaders and team members can inadvertently create perceptions of unequal treatment or favoritism, potentially impacting team dynamics and morale. It suggests the need for leaders to navigate proximity carefully, ensuring that open communication and collaboration do not unintentionally lead to perceptions of bias or favoritism within the organization. Effective communication channels and quick responses were emphasized in maintaining high-quality leader-member exchanges. DR3 noted that new leadership is focusing on clear communication: “Communication is probably the biggest why to support our organization on ways to overcome barriers and with our new leadership, we are learning how to trust in that communication process.” It highlights that such communication is essential for fostering positive relationships and organizational effectiveness. CL2 discussed the need for two-way communication to help build those relationships:

> I think the open-door policy is somewhat cliché, but I try to live it. If our team needs to know that they can come talk to me about anything and your availability and actions have to support trust in the communication and follow through process.

However, the direct report responses only mentioned challenges in two-way communication and the absence of a feedback loop and how they disrupt team balance and impact the effectiveness of LMXs and, consequently, the overall team effectiveness. As DR2 mentioned, "There are times where the perception is if you ask a question to your supervisor the perception is if they do not respond quickly the problem will figure itself out." DR2 also expressed that the feedback can be too general and not supportive of positive change, "The feedback has become too ambiguous; I need clarity on what is wrong and what needs to change. I need to see examples of what the supervisor is trying to address." Comments made by DR8 also supported the issues with challenges of two-way communication: "Communication is present, but it is unclear what can be shared with others and what information has to be guarded; this creates an uneasiness in trusting what is and is not communicated."

There was an alignment with the understanding that seamless and reciprocal communication was crucial for building trust, aligning goals, and ensuring that the LMX was balanced and productive. CL4 explained how goal alignment and communication go hand-in-hand, "I don't give lots of answers, I ask lots of questions and listen. Facetime is important, I want them to understand why they did what they did and how does it align with our policy and purpose." CL4 went on to articulate that inclusivity in the process is important: "My door is literally always open. If I am discussing something that is not personal and others are standing outside the door, I invite them in to listen, learn, and add to the discussion." Both groups underscored the need for leaders to establish open channels for two-way communication and feedback loops to maintain a healthy and effective exchange, ultimately contributing to improved organizational performance and team dynamics. DR3 discussed team dynamics and alignment: "We have to have buy-in and if supervisors present us with the why and the how of expectations and we can talk about barriers from our perspective, work gets done so much better." However, the leaders did not voice the challenges present with this process, which was evident from direct report data. DR1 summarized some of the communication barriers best:

> Freedom of communication is difficult due to the environment created when you feel you will get in trouble, as opposed to getting support to work through an issue. It can suffocate the organization if you have to worry about how information is shared, because some did not hear it first or did not want others to know about an issue. We should all be on the same page.

There was importance given to the belief in the leader's alignment with organizational goals and fostering a shared vision contributing to positive social identity within the organization. DR7 mentioned, "Everything the leader does goes back to understanding our goals and building a support system." DR5 explained, "Knowing the purpose of our department and having a leader that motivates others through action and visibility helps to create accountability and team." The direct reports understood the importance of establishing ingroup dynamics with supervisors and making efforts to promote collective identity beyond individual departments. Both groups emphasized that when leaders are perceived as aligned with the broader organizational objectives and actively promoting a shared vision, it positively impacts the social identity of the entire organization, suggesting that when leaders foster an environment that encourages collective identity and collaboration beyond departmental boundaries, it contributes to a sense of unity and shared purpose within the entire organizational framework. The importance of leadership alignment with organizational goals and establishing ingroup dynamics in promoting a positive social identity and cohesive organizational culture within a K-12 public education organization was best captured by CL3: "Goals align with action and action has to align with people, as a leader you share in building the organizational structure, so everyone has a part and understands the whole."

Both interview groups spoke about trust, transparency, and emotional factors significantly influencing decision-making and leader-follower relationships within a K-12 public education organization. CL2 compared the ideas of trust in the organization to football:

> We have to trust that the people at the table know how to do their jobs and when the time comes will do their jobs, like the left tackle in blocking for the quarterback—if there is no trust in the position, there is no way we score.

The concept of trust was summarized similarly by DR7: “Everything goes back to the level of trust established, the trust my supervisor has in me and mine in them. Trust involves allowing me to do my job and me accepting guidance when needed.” The emphasis on trust highlights a core tenet of LMX theory, emphasizing the quality of relationships between leaders and followers, mainly focusing on mutual trust and respect. Additionally, recognizing emotional factors aligned with SIT underscores the influence of emotions and social connections on individual and group organizational behavior. The study participants suggested that when trust and transparency are prevalent, they positively influence decision-making processes and foster more meaningful leader-follower relationships, aligning with the principles of LMX theory. CL 2 stated, “The building of trust is important in breaking down barriers and encourages a shift from protecting information and interests to more open communication and collaboration.” Trust, transparency, and emotional factors are pivotal in shaping leader-follower relationships and decision-making processes, aligning with established theories regarding organizational behavior and leadership dynamics, as supported by CL2: “There is nothing bigger than trust; it was what keeps everything moving for people.”

Direct reports addressed the need for their supervisor to be task-oriented yet supportive and responsive, reflecting a balance between task and relationship leadership. DR1 explained, “How my supervisor engages in the process but does not dictate the process helps to show that they recognize and understand the effort, and this contributes to a positive working environment." This balance aligned with the principles of effective leadership, indicating that the supervisor values achieving tasks and fostering positive relationships within the team. A task-oriented approach ensures that goals are met and work is efficiently carried out. At the same time, a supportive and responsive attitude demonstrates care for the team's well-being and individual needs. As DR3 stated, "With new leadership we know there is a job to do, but being allowed to do the job in our way allows us to feel supported. We are told the goals, but not what to do or how to do it." This duality was crucial in LMXs as it signifies that the supervisor not only focuses on task completion but also values the quality of relationships and the well-being of team members.

This balanced approach was essential for maintaining a healthy work environment and ensuring team members felt supported, valued, and motivated. DR4 explained, "The essence of effective leadership lies in the ability to embrace transparency and recognize the intrinsic worth of every team member's experience." This balance contributes to a positive LMX, through which the tasks and interpersonal dynamics are given attention. By acknowledging the importance of both aspects, the supervisor can create an environment where team members feel motivated and supported, ultimately leading to improved team performance and a more cohesive work culture within the organization. DR1 said it is not hard for a leader to make this happen: "True leadership thrives on a foundation of regular check-ins, positive reinforcement, and the sharing of leadership moments, fostering a culture of motivation within the workplace."

Cabinet-level leaders and their direct reports provided valuable insights into how positive LMX practices and behaviors influence collective organizational behaviors in a K-12 public education organization. It was important to capture the perspectives of both leaders and followers to understand the LMX dynamic and its impact on social identity within the organization. Both spoke to a strong relationship with supervisors, characterized by trust, collaboration, and clear communication, which fosters ingroup dynamics and aids in breaking down silos. CL3 echoed the concept: “In championing collaborative efforts, hosting interdepartmental meetings, and actively combatting silo mentalities, we embrace a collective identity that transcends individual departments.” However, the proximity that facilitates open communication may lead to perceptions of favoritism, highlighting the need for leaders to navigate proximity carefully to avoid unintentional bias or favoritism. DR2 expressed concerns with proximity: “I can see how my relationship and other relationships with supervisors cause concerns regarding perceptions of favoritism and fairness. Some other leaders do not feel all is fair due to perceived closeness.”

Effective communication channels and quick responses are essential for fostering positive relationships and organizational effectiveness. Direct reports explicitly mentioned challenges in two-way communication and the absence of a feedback loop. DR8 explained the following:

> Effective communication is not just about understanding job needs and barriers; it’s the lifeline that prevents the entanglement of issues caused by poor communication. It protects against the myriad problems that arise when communication falters within a team.

This underscored the impact on team balance and the effectiveness of LMX. Both leader and direct report groups stressed the need for open channels for two-way communication and feedback loops to maintain a healthy and effective exchange, ultimately contributing to improved organizational performance and team dynamics. Proper communication channels stress the significance of leadership alignment with organizational goals and establishing ingroup dynamics in promoting a positive social identity and cohesive organizational culture within the K-12 public education organization. Believing in the leader's alignment with organizational goals and fostering a shared vision contributes to positive social identity and unity within the organizational framework.

The interview responses focused on how trust, transparency, and emotional factors significantly influence decision-making and leader-follower relationships, aligning with LMX theory and SIT principles. Acknowledging emotional factors indicates understanding how emotions and social connections shape organizational dynamics, leader-follower relationships, and decision-making processes. The direct reports emphasized the need for their supervisors to maintain a balanced approach—task-oriented yet supportive and responsive. This balance between task and relationship leadership is crucial in LMXs within the K-12 public education organization, as it ensures that both task completion and the quality of relationships and the well-being of team members are valued. This balanced approach is essential for maintaining a healthy work environment and ensuring team members feel supported, valued, and motivated, ultimately leading to improved team performance and more cohesive work culture.

Cabinet-level leaders and their direct reports provided valuable insights into how positive LMX practices and behaviors influence collective organizational behaviors. Capturing leader and follower perspectives helped to understand the LMX dynamic and its impact on organizational social identity. A strong relationship with supervisors might foster ingroup dynamics and aid in breaking down silos. Effective communication channels were emphasized as essential for fostering positive relationships and organizational effectiveness, with challenges in two-way communication and the absence of a feedback loop noted as impacting team balance and the effectiveness of leader-member exchanges. Alignment with organizational goals, establishing ingroup dynamics, and fostering a shared vision was crucial for promoting a positive social identity and cohesive organizational culture. Significant time was given to the influence of trust, transparency, and emotional factors on decision-making and leader-follower relationships, aligning with LMX theory and SIT principles. Finally, the need for supervisors to maintain a balanced approach—task-oriented yet supportive and responsive—was emphasized as crucial for ensuring a healthy work environment and team motivation, ultimately contributing to improved team performance and a more cohesive work culture.

Research Question 2

The data I obtained and analyzed provided an answer to RQ2: “How do followers’ perceptions of leadership practices and behaviors influence their self and collective identities?” The cabinet-level and direct report datasets underscored the significance of a solid supervisor-subordinate relationship characterized by trust, collaboration, and transparent communication. The direct reports emphasized a need for a strong relationship with their supervisors, highlighting ingroup dynamics, as DR8 stated, “Our supervisor’s dedicated efforts in fostering openness plays a pivotal role in cultivating a positive sense of belonging and a shared clarity of goals and expectations,” which from the triangulation of the data sources supported a sense of being valued, having a voice, and high collaboration.

At the same time, acknowledgment of silos and the need to break them down was also mentioned by both groups. CL2 explained the following:

> When we operated more in silos, I think there was a lot of difficulty in trying to establish some of the program and program-design kinds of things that we were trying to implement. There were some barriers; really, I think more personalities than true barriers.

DR5 also stated, “Additionally, raising awareness about organizational silos is essential; individuals may be unaware of them due to emotional attachment or familiarity with their department. Creating awareness is imperative for progress.” Effective communication channels, quick responses, two-way communication, and feedback mechanisms are highlighted, emphasizing the pivotal role of effective communication in high-quality LMXs. Trust within the organization, internally and externally, was emphasized, built on the supervisor's understanding of the direct report's role and proactive efforts to stay ahead of deadlines. DR1 explained the following:

> In our department, trust is a big deal among our teams and those that work with us. If our boss does not understand what we do and why and delays the product, I don't feel trusted, and those that depend on me lose trust.

However, challenges in two-way communication, particularly in addressing deficits in listening, were expressed by DR2: "I have had other team members call me and ask, how do we get our supervisor to listen to us. I think there are times where some things get dismissed a little bit," indicating the need for clear communication, understanding the "why" behind goals, and fostering buy-in. The absence of a feedback loop might lead to inadequate input consideration, potentially unbalancing the LMX and allowing the integration of diverse perspectives and approaches, contributing to the team's and organization's overall effectiveness.

The impact of shared purpose in differentiating leader-member relationships and contributing to organizational cohesion was understood by the cabinet-level leaders, as expressed by CL4: "We really try to work on creating a shared purpose and believe it makes all the difference in our relationships and helps bring our district together." The emphasis on a shared purpose was believed to contribute to a cohesive organizational culture that aligned individual team members toward a common goal. Additionally, the acknowledgment of silos and the expressed need to break them down highlights the importance of fostering ingroup dynamics to aid in this process. As DR8 explained, "We're making sure we don't get stuck in silos because we know it's key to building a sense of unity across all departments. It's all about breaking down those barriers between us and creating a real team spirit." By emphasizing collaboration and shared goals, the cabinet leaders and direct reports expressed that breaking down silos was essential for creating a cohesive organizational culture, ensuring that team members work collectively towards shared objectives rather than operating in isolated units. This recognition underscores the significance of promoting a shared identity and a unified mission across various departments, fostering a cohesive and collaborative organizational environment.

A strong belief in the leader's alignment with organizational goals was routinely expressed. DR1 explained that "goal alignment isn't just reassuring; it's the bedrock of our team's positive identity, uniting us in a shared sense of purpose." The direct reports expressed confidence in their leaders' commitment to organizational objectives and values, emphasizing the significance of this alignment in fostering a positive social identity within the team. The supervisor's transparency, appreciation of their team's experience, and individualized consideration demonstrate a deep understanding of each team member's unique needs and strengths. DR2 supported this when stating, "They really get us, you know? They take the time to understand what makes each of us tick, playing to our strengths and supporting us where we need it most." This individualized approach reflects the leaders' efforts to build trust and demonstrate genuine care for their team, ultimately contributing to a sense of belonging and shared purpose within the organization. Recognizing individual team members' contributions and experiences was another area highlighted. CL3 explained how she knows individual recognition matters: "It's huge for me. I love walking around and visiting different departments. Sometimes, I end up spending an hour somewhere unexpected, but seeing notes on desks or bulletin boards tells me it mattered." DR4 said, "It's a clear indication that people are watching, paying attention, and appreciating the effort,” indicating a leader who values and respects the diverse strengths and perspectives within the team, fostering an inclusive and supportive environment that aligned with the organization’s overarching goals and values.

The analysis of the interviews, observations, and documents offered distinct perspectives on various aspects, including challenges related to decision-making and concerns about favoritism and fairness. For instance, the direct reports’ data indicated challenges in two-way communication, the absence of a feedback loop, and the need to maintain fairness in recognition and rewards. In contrast, the cabinet-level leaders emphasized the importance of open communication and feedback loops, recognition of the need for a collective identity, and acknowledgment of differences among team members. Despite these differences, the two groups comprehensively understand how followers’ perceptions of leadership practices and behaviors influence their individual and collective identities within an organizational context. Followers highly prize transparent communication, personalized attention, and an inclusive leadership approach that nurtures a robust sense of shared identity and purpose. They voiced the necessity of tackling decision-making and fairness issues to uphold a positive social identity and promote a cohesive organizational culture.

Research Question 3

The collective data analysis guided RQ3 regarding identity leadership's influence on purpose-aligned outcomes within K-12 public education. The followers' perceptions of leadership practices and behaviors impact their individual and collective identities within the organization. I discussed and observed several key elements contributing to purpose-aligned outcomes and cultivating a positive social identity within the organizational context.

Both groups discussed emotional challenges and factors such as ego and fear; DR2 expressed concerns within the ingroup and how supervisors' support impedes collaboration: "Although I understand the importance of differing perspectives, it's frustrating when there's no opportunity to resolve conflicts effectively. I wish for more guidance and mediation in such situations, but personal or professional feelings get in the way." This aligned with the premise of SIT, emphasizing the impact of emotional factors on developing a positive social identity and purpose-aligned outcomes within the team. CL4 responses revealed that emotional challenges, including frustration and emotional decision-making, are prominent factors influencing the dynamics of leadership and follower interaction:

> It became clear how much emotions drive the way leaders and followers interact. I learned that emotions aren't just background noise; they're front and center. There are times I struggle to be tuned into and handle emotions skillfully to foster positive interactions.

Emotional factors, such as ego and fear, are suggested to impact decision-making processes within the organization significantly. This aligned with the premise of SIT, which underscores the impact of emotional factors on developing a positive social identity and purpose-aligned outcomes within the team. Acknowledging these emotional challenges highlights the complexity of leadership interactions and their influence on cultivating a cohesive and purpose-driven organizational culture. Understanding and addressing these emotional factors becomes crucial in shaping a positive social identity and ensuring purpose-aligned outcomes within the team. By recognizing the impact of emotions on decision-making and team dynamics, there was an emphasis for leaders to navigate and manage these emotional influences effectively to foster a sense of shared purpose and identity within the organizational context.

The crucial role of trust is built on transparency, honesty, and open dialogue, aligning closely with the principles of LMX theory (Rosen & Tost, 2020). Supervisors' transparency and appreciation of their team's experience demonstrate individualized consideration, where each team member's unique needs and strengths are understood and valued. The observed actions of CL2 and their comments explained how this works in the current district system: "As a leader within our organization, I've witnessed firsthand the power of fostering a 'community of leaders.' It's remarkable to see how we prioritize collaboration through trust over competition among our direct reports." As reported by the direct reports, this individualized approach was instrumental in supporting purpose-aligned outcomes by cultivating a sense of belonging and a shared understanding of goals and expectations within the team. DR7 stated the following:

> From my experience, our supervisor's transparency and genuine appreciation for each of us really stand out. It's like they truly 'get' us as individuals. The open approach not only builds trust among us but also fuels our dedication to the districts.

It reflects the essentiality of building trust through effective communication practices, which, in turn, contributes to establishing a positive social identity and purpose-aligned outcomes within the organizational context.

Acknowledging challenges in two-way communication and proactive efforts to address deficits in listening and closed communication styles demonstrate a commitment to creating an environment where team members feel comfortable challenging decisions and expressing their perspectives. This approach aligned with LMX theory's emphasis on the quality of leader-follower relationships, as it fosters an inclusive and supportive environment that encourages individual expression and collaboration, ultimately contributing to purpose-aligned outcomes. By recognizing and appreciating each team member's unique experiences and strengths, the supervisors show an understanding of the importance of individualized consideration, which was pivotal in fostering a sense of belonging and a shared understanding of goals and expectations within the team. This individualized approach supports purpose-aligned outcomes by ensuring team members feel valued, understood, and empowered to contribute to the organization’s goals.

Summary

The analysis of cabinet-level leadership within the framework of LMX theory revealed significant insights into how interpersonal and intrapersonal identities are influenced within an organization, particularly in a K-12 public education setting. Through a comprehensive examination of data from both cabinet-level leaders and their direct reports, several key themes emerged. In the study, I examined how positive LMX practices impact collective organizational behaviors in a K-12 public education setting, considering perspectives from cabinet-level leaders and their direct reports. Participants revealed the significant impact of positive LMX practices on collective organizational behaviors within a K-12 public education organization, emphasizing the importance of transparent communication, individualized consideration, and trust-building to foster collaboration and organizational identity alignment while navigating challenges such as communication deficits and perceptions of favoritism.

Chapter 4 reports my in-depth analysis to explore the various factors influencing LMX practices within the organization, shedding light on the significance of transparent communication, individualized consideration, and trust-building in fostering collaboration and organizational identity alignment. Building upon these findings, Chapter 5 delves into practical recommendations and strategies derived from the research outcomes to enhance LMX practices and promote a positive organizational culture. Through a comprehensive examination of these recommendations, Chapter 5 provides actionable insights for organizational leaders to implement effective approaches for nurturing high-quality relationships, fostering trust, and driving collective success within their respective contexts.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this qualitative case study was to investigate how attitudes and behaviors of K-12 cabinet-level leaders influence intergroup and intragroup identities. The study conducted within a South Texas K-12 public school district focused on the impact of LMX practices on collective organizational behaviors. Through the analysis of interview data, observation data, and organizational artifacts, the study addressed the concepts of collaboration among intergroup and intragroup followers, thereby improving organizational health and student success in K-12 public schools.

In this chapter, I discuss the findings in relation to the SIT framework and existing literature to address the research questions and suggest avenues for future research. The chapter provides a comprehensive overview of the addressed problem, purpose statement, research questions, and insight into the individuals and settings involved. I also discuss significant findings from interviews, observations, and collected artifacts, and explore potential paths for future research to expand the review of K-12 public school leadership research and its impact on organizational health.

Summary of Problem and Purpose

The problem addressed in this study revolved around the ST District’s cabinet-level administration’s navigation of intragroup and intergroup identity, impacting LMX dynamics, follower obligation, organizational behavior, and citizenship. Poor incorporation of relational leadership theory and social networking was thought to lead to silo mentalities, attributed to underdeveloped communication skills and social identity awareness among leadership. This qualitative case study addressed the proposed need to explore the influence of cabinet-level leaders’ attitudes and behaviors on intergroup and intragroup identities, examining how positive

LMX practices within a district-level administration team impacted collective organizational behaviors, thereby shedding light on leadership development in social identity and fostering collaboration among intergroup and intragroup followers for improved organizational health and student success.

Research Framework and Questions

In this study, I employed the SIT framework to explore how leader-follower relationships shape organizational performance and recognize organizational dyads as psychosocial processes. SIT's perspective on social categorization suggests that individual behaviors and relationships are influenced by self and group identification, offering insight into leadership dynamics. The aim of this study was to contribute to a better understanding of specific leadership domains and how leaders can effectively motivate followers and advance organizational goals within an organizational context influenced by followers' perceptions. This was accomplished by examining K-12 public school cabinet-level leadership through the lens of SIT.

Addressing the challenge of leadership style and group identity navigation necessitated an exploration of leadership characteristics, behaviors, and skills and their impact on collective organizational behaviors. My aim in this study was to investigate three research questions:

RQ1: How do positive leader-member exchange practices and behaviors influence collective organizational behaviors in a K-12 public education organization?

RQ2: How do followers' perceptions of leadership practices and behaviors influence their self and collective identities?

RQ3: How are purpose-aligned outcomes affected by identity leadership in K-12 public education?

Summary of Study

This single case study focused on a South Texas K-12 public school district involving four cabinet-level leaders and eight direct reports, with data collected through interviews, observations, and artifact reviews over three months. It explored relational leadership attitudes, perceptions of intergroup and intragroup interactions, and organizational climate and culture within this district. The study addressed disruptive ingroup dynamics commonly observed in Texas public school districts, which typically operate under traditional hierarchical structures with specific communication and supervision protocols. The population sample included assistant superintendents, chief operation officers, or executive directors intentionally selected for their diverse followers. I interviewed each cabinet-level leader and two of their direct reports, supplemented by observations and organizational artifacts, enhancing data validity through triangulation. The final themes derived from this single-case study provide insight into the intricate dynamics within K-12 public school leadership, as represented in Table 11.

Table 11

Final Themes

Theme number	Theme name	Description
1	Communication Facilitation and Quality	Encompasses processes and standards implemented to enhance communication effectiveness, addressing barriers like language, technology, and hierarchical structures.
2	Trust and Respect	Delves into foundational elements of interpersonal relationships, encompassing beliefs, perceptions, and attitudes toward colleagues and the organization.
3	Communication Challenges	Highlights obstacles hindering effective communication, stemming from organizational structure, culture, technology, interpersonal dynamics, and external influences.
4	Organizational Alignment and Tradition	Sheds light on customs, rituals, and values ingrained within organizational culture, shaping employee attitudes, behaviors, and norms over time.
5	Team Dynamics and Equity	Explores communication patterns, collaboration, and interaction within teams striving towards common objectives, including team structure, leadership styles, communication patterns, conflict resolution strategies, and decision-making processes, elucidating the intricate workings of team dynamics in K-12 public school settings.

The final themes derived from this single-case study provided a comprehensive understanding of leadership dynamics in K-12 public schools. Theme 1: Communication Facilitation and Quality emphasizes overcoming barriers such as language, technology, and hierarchical structures and directly addresses RQ1 on the impact of positive LMX practices on collective organizational behaviors. This theme was supported by the data, which illustrates how positive discussions about values and active participation in defining identity foster cohesion and alignment, thereby influencing organizational behaviors positively. Theme 2: Trust and Respect explored foundational aspects of interpersonal relationships, aligning with RQ2 regarding followers' perceptions of leadership practices and their identities. The data showcased how perceived positive reputation and commitment to implementation contribute to a sense of trust and respect, ultimately shaping organizational behaviors. Theme 3: Communication Challenges, highlights obstacles, such as organizational structure, culture, and interpersonal dynamics, addressing RQ1 and RQ2. The participants illustrated how challenges in two-way communication and the absence of a feedback loop impact team balance and LMXs, underscoring the importance of effective communication channels and feedback mechanisms. Theme 4: Organizational Alignment and Tradition provided insights into the customs, rituals, and values entrenched within organizational culture, linking to RQ3 on the influence of identity leadership on purpose-aligned outcomes. The data supported this theme by demonstrating how agreement on alignment strategies and integration into daily practices contribute to organizational alignment and tradition, ultimately influencing organizational behaviors positively. Theme 5: Team Dynamics and Equity explored communication patterns, collaboration, and interaction within teams striving toward common objectives, contributing to RQ3. The data depicted how team dynamics, leadership styles, and decision-making processes impact organizational behaviors and alignment with organizational goals. These themes collectively addressed each research question by providing insights into how leadership practices and behaviors influence communication, trust, organizational alignment, and team dynamics within K-12 public school settings.

Discussion of Findings in Relation to Past Literature

The findings of this study are closely aligned with existing literature on power dynamics, SIT, and LMX theory. Bochatay et al. (2019) suggested that social identity frameworks can influence organizational power structures, potentially leading to intergroup conflict, highlighting the need for improved social identity awareness among K-12 public school district cabinet-level leaders, a key focus of this study. Additionally, Flamino et al. (2021) described the emotional significance of ingroup identification, which resonates with the differentiation between high-quality and low-quality LMX relationships proposed by Park et al. (2022).

Graen et al. (2006) discussed the benefits of high-quality LMX relationships, such as increased responsibility and trust, while Dutton (2003) outlined the drawbacks of low-quality relationships. These insights aligned with the study’s findings regarding the importance of fostering positive LMXs to enhance organizational behavior and reduce intergroup tensions.

Matta et al. (2020) emphasized the role of leaders’ understanding of individual relationships in group settings, which influences organizational citizenship behavior and counterproductive work behavior. Ng (2017) highlighted the reciprocity inherent in LMX theory, and Hofmans et al. (2019) stressed the necessity for leaders in complex organizational systems to comprehend LMX theory to establish healthier organizational dynamics.

LMX relationships can be categorized as ingroup and characterized by high-quality relationships built on trust, respect, and resource exchanges, or as outgroups with lower perceptions of these dyadic relationships (Martin et al., 2016). Understanding the implications of poorly managed LMX differentiation, such as higher conflict and lower job satisfaction, is crucial (Anand et al., 2016). The impact of a lack of LMX differentiation on team members' organizational behaviors underscores the importance of this research (Tse et al., 2013).

Leaders must navigate identity leadership and group identity management to promote mutually collaborative relationships for all groups (Kershaw et al., 2021). Rast et al. (2018) emphasized that promoting intergroup relational identity can mitigate threats to leadership, creating organizational climates conducive to positive organizational behaviors. Including SIT, relational leadership, and identity leadership in leadership development programs is crucial, particularly in challenging organizational cultures (Channing, 2020). Lennon (2020) highlighted the importance of human relations skill development, which is often lacking in leadership development and perceived organizational effectiveness.

The research data collected on silo mentality within K-12 public education organizations indicated that organizational silos, characterized by segregated communication channels and individual or group-focused motives, pose significant challenges to knowledge sharing and organizational effectiveness (de Waal et al., 2019; Mouta & Meneses, 2021). Despite the recognized importance of breaking down silos to foster innovation and sustainability (de Waal et al., 2019), the hierarchical design of bureaucratic organizations, such as those found in K-12 public education, often perpetuates power dynamics that inhibit communication and learning (Reese, 2021; Wong et al., 2020). This hierarchical structure can disempower subsets within the organization and hinder effective coordination and sharing of resources (Matusik et al., 2022). The research underscored the need for leadership to recognize and address power imbalances and to shift from a top-down approach to one that promotes collaboration and knowledge sharing among all stakeholders (Baker et al., 2022; Wong et al., 2020).

The data analysis highlighted several aspects of leadership dynamics, communication strategies, and organizational culture within K-12 public schools. While much of the analysis aligned with existing research and theoretical frameworks, there are also areas where the data may present contradictions or divergences from current research.

One potential contradiction lies in portraying the transition between former and new organizational leaders. While the data suggested that the former leader had an extensive understanding of job needs, which could lead to assumptions and a lack of awareness of barriers, the existing research from Harms et al. (2017) emphasized the importance of experienced leaders in navigating complex educational environments. This contradiction raised questions about the effectiveness of leadership transitions and the impact of leadership turnover on organizational performance.

Another potential contradiction was the discussion of communication challenges and the shift towards more open and honest communication within the organization. While effective communication is widely recognized as essential for organizational success (Jehn et al., 2017), the data suggested that there are challenges in transitioning communication styles, particularly from a more closed communication approach. This contradiction may indicate underlying issues related to organizational culture, leadership styles, or resistance to change within the institution.

Furthermore, the data highlighted the importance of trust-building efforts and recognition practices in fostering a positive organizational environment. While these strategies are commonly cited in the literature as effective means of enhancing employee morale and engagement (Göbel & Taddicken, 2017), the data suggested that trust-building was a process, and recognition practices may vary in their effectiveness. This contradiction raised questions about the implementation and sustainability of these practices within educational settings and their impact on organizational outcomes over time.

Overall, while the data largely aligned with current research on leadership, communication, and organizational culture within K-12 public schools, there are instances where contradictions or divergences from existing literature were presented. These contradictions provided valuable insights into the complexities of educational leadership and highlighted areas where further research is needed to better understand and address organizational challenges within the field.

In conclusion, this study contributes to enhancing leadership development in social identity leadership and fostering collaboration among intergroup and intragroup teams in K-12 public education. By recognizing and addressing key concepts, such as psychological safety, organizational identification, relational trust, silo mentality, power dynamics, and communication as knowledge sharing, educational leaders can foster positive organizational cultures and improve student outcomes. To inform effective leadership strategies and practices, further research is needed to explore the specific challenges and dynamics of district-level leadership in K-12 education.

Summary of Findings

The following summary thoroughly addresses each research question by analyzing all data collected from Chapter 4.

Research Question 1

RQ1 asked about the influence of positive LMX practices and behaviors on collective organizational behaviors within a K-12 public education organization. Analyzing data from both cabinet-level leaders and direct reports was crucial to comprehensively grasp how these practices and behaviors shape organizational dynamics and social identity. The findings collectively demonstrated the significant impact of leadership dynamics, communication, collaboration, and organizational culture on developing and aligning organizational identity within the K-12 public education context.

The analysis of interview responses, complemented by observational data, highlighted the complex dynamics of leadership within a K-12 public education organization. While a strong relationship between supervisors and direct reports was acknowledged as fostering ingroup dynamics and breaking down organizational silos, concerns about proximity leading to perceptions of favoritism were also raised. This suggests that while open communication is essential for effective leadership, leaders must navigate proximity carefully to prevent unintentional biases.

Effective communication emerged as a central theme in promoting positive LMXs and organizational effectiveness. Direct reports emphasized the importance of clear communication and quick responses in maintaining team balance and effectiveness. Challenges such as the absence of feedback loops were noted, indicating areas for improvement in communication practices. Both leaders and direct reports stressed the need for open channels for two-way communication and feedback loops to enhance organizational performance and team dynamics.

Belief in the leader's alignment with organizational goals emerged as another crucial factor in fostering a positive social identity. When leaders were perceived as promoting a shared vision and aligned with broader organizational objectives, it positively influenced the social identity of the entire organization. This underscores the importance of leadership alignment and vision in fostering unity and shared purpose among team members.

Trust, transparency, and emotional factors significantly influenced decision-making and leader-follower relationships within the organization. Acknowledging emotional factors highlights an understanding of their role in shaping organizational dynamics and relationships. Both leaders and direct reports emphasized the need for trust-building and transparent communication to foster meaningful leader-follower relationships and effective decision-making processes.

Maintaining a balanced approach between task-oriented and supportive leadership was recognized as essential for creating a healthy work environment and ensuring team members feel valued and motivated. This balance contributes to positive LMXs, prioritizing task completion and relationship quality. Overall, the insights provided by both leaders and direct reports offer valuable perspectives on how positive LMX practices influence collective organizational behaviors in a K-12 public education organization, highlighting areas for improvement and strategies for fostering a cohesive and effective work culture.

The data analysis collected from both leader and follower perspectives revealed several key insights into the nature of positive LMX practices. Proximity, characterized by close physical or relational proximity between leaders and team members, emerged as a double-edged sword. While proximity facilitated open communication, it also led to perceptions of favoritism among team members, highlighting the need for leaders to navigate this aspect carefully. Furthermore, effective communication channels and quick responses were identified as crucial for fostering positive relationships and organizational effectiveness. Challenges in two-way communication, such as the absence of a feedback loop and ambiguous feedback, were noted as disruptive factors that could impact team balance and the effectiveness of LMXs.

Research Question 2

RQ2 focused on investigating the influence of followers' perceptions of leadership practices and behaviors on their self and collective identities within the organizational context. Using data to answer the question helped to understand how followers interpret and internalize leadership behaviors, including communication, recognition, and alignment with organizational goals, and how these perceptions shape their identities and sense of belonging. By exploring the relationship between leadership practices and followers' identities, the discussions in relation to RQ2 contributed to a deeper understanding of the dynamics of leader-follower interactions and their implications for organizational culture and cohesion.

The data analysis examining how followers' perceptions of leadership practices influence their self and collective identities revealed the pivotal role of supervisor-subordinate relationships characterized by trust, collaboration, and transparent communication. Direct reports emphasized the significance of such relationships, highlighting how they fostered ingroup dynamics and contributed to a shared sense of clarity and purpose. This was evident in direct reports' statements, emphasizing the importance of openness in cultivating a positive sense of belonging and collaboration, supported by data triangulation revealing a solid correlation between valued, collaborative relationships and a positive organizational identity.

Both cabinet-level leaders and direct reports acknowledged the existence of organizational silos and recognized the importance of breaking them down. Effective communication channels, quick responses, and two-way communication were identified as critical components in achieving this. However, participants noted challenges in communication, particularly deficits in listening and feedback mechanisms, highlighting the need for clear communication strategies and fostering buy-in among team members. They identified the absence of a feedback loop as a potential barrier to integrating diverse perspectives and approaches, thus impacting the overall effectiveness of the team and organization.

Shared purpose emerged as a driving force in differentiating leader-member relationships and fostering organizational cohesion. Cabinet-level leaders emphasized the importance of creating a shared purpose to unite the organization towards common goals, while direct reports underscored the need to break down silos to achieve this. These leaders' and direct reports' recognition of shared goals and collaboration as essential for breaking down silos reflects the understanding that fostering ingroup dynamics is crucial for creating a cohesive and collaborative organizational environment.

Alignment with organizational goals was consistently emphasized, with direct reports expressing confidence in their leaders' commitment to these goals. This alignment was perceived as vital in fostering a positive social identity within the team, reflecting leaders' efforts to demonstrate genuine care for their team members' needs and strengths. Individualized recognition of contributions and experiences further reinforced a sense of belonging and shared purpose within the organization, aligning with overarching organizational goals and values.

Despite some disparities between the perspectives of cabinet-level leaders and direct reports, both groups demonstrated a comprehensive understanding of how followers' perceptions of leadership practices influence their individual and collective identities. Transparent communication, personalized attention, and an inclusive leadership approach emerged as critical factors in nurturing a robust sense of shared identity and purpose. Addressing challenges related to decision-making and ensuring fairness in recognition and rewards were identified as crucial steps in upholding a positive social identity and promoting a cohesive organizational culture.

The analysis of data collected in response to RQ2 provided valuable insights into the dynamics of supervisor-subordinate relationships within the K-12 public education organization. Both cabinet-level leaders and direct reports emphasized the significance of a solid supervisor-subordinate relationship characterized by trust, collaboration, and transparent communication. Direct reports highlighted the importance of a strong relationship with their supervisors in fostering ingroup dynamics and creating a positive sense of belonging. This sense of belonging was further reinforced by the acknowledgment of silos and the expressed need to break them down. Effective communication channels, quick responses, and feedback mechanisms were identified as essential elements for facilitating high-quality LMXs and building trust within the organization.

Research Question 3

RQ3 sought to examine how purpose-aligned outcomes are influenced by identity leadership within the context of K-12 public education. A review of the data to answer the question explored the extent to which leadership practices that promote a shared organizational identity impact the achievement of goals aligned with the overarching purpose of the educational institution. By investigating the relationship between identity leadership and purpose-aligned outcomes, RQ3 contributed to understanding how leadership strategies can shape educational initiatives' collective direction and success in K-12 settings.

The analysis of data collected to answer RQ3 shed light on the influence of identity leadership on purpose-aligned outcomes within K-12 public education. The data revealed how followers' perceptions of leadership practices and behaviors impact their individual and collective identities within the organization, emphasizing the critical role of emotional factors, such as ego and fear, in shaping team dynamics and decision-making processes. These emotional challenges underscore the complexity of leadership interactions and highlight the need for leaders to effectively manage these influences to foster a sense of shared purpose and identity within the organizational context, ultimately contributing to purpose-aligned outcomes.

Trust emerged as a central theme in fostering purpose-aligned outcomes, built on principles of transparency, honesty, and open dialogue consistent with the LMX theory. The supervisors’ transparent approach and appreciation of their team’s experiences demonstrate individualized consideration, fostering a sense of belonging and shared understanding of goals and expectations within the team. This emphasis on trust through effective communication practices builds cohesion among team members and fuels their dedication to achieving the organization’s goals, reflecting the essentiality of trust-building in promoting purpose-aligned outcomes within the organizational framework.

Both cabinet-level leaders and direct reports discussed emotional challenges and factors, such as ego and fear, that impact leadership dynamics and follower interactions. Direct reports expressed frustrations within the ingroup dynamics, citing impediments to collaboration when conflicts arise. This resonates with SIT, emphasizing the significance of emotional factors in shaping a positive social identity and purpose-aligned outcomes within teams. Leaders also acknowledged the prominence of emotions in driving interactions, recognizing the need to handle emotions skillfully to foster positive interactions.

Acknowledging challenges in two-way communication and proactive efforts to address deficits in listening demonstrate a commitment to creating an inclusive environment where team members feel comfortable expressing their perspectives. This approach aligned with LMX theory’s emphasis on the quality of leader-follower relationships, fostering an environment that encourages individual expression and collaboration. By recognizing and appreciating each team member's unique experiences and strengths, supervisors contribute to purpose-aligned outcomes by ensuring that team members feel valued, understood, and empowered to contribute meaningfully to the organization's collective goals.

The analysis underscored the importance of emotional intelligence and effective communication practices in identity leadership within K-12 public education settings. By navigating emotional challenges, building trust, and fostering inclusive environments, leaders can cultivate a positive social identity and promote purpose-aligned outcomes within their teams. These findings provide valuable insights for educational leaders seeking to enhance organizational effectiveness and achieve collective goals in K-12 public education contexts.

Limitations

Insights from this study might not fully encapsulate the diverse spectrum of leadership dynamics across various educational institutions. The interpretation of qualitative data, such as interviews and observational data, is inherently subjective and susceptible to the researcher's biases or perspectives despite efforts to minimize bias through rigorous data analysis procedures.

Participants may have been inclined to offer responses perceived as socially desirable or aligned with organizational norms and expectations, potentially affecting the accuracy and depth of the data collected, especially regarding sensitive topics such as leadership challenges. The study's timeframe might have constrained the data collection and analysis depth, limiting a comprehensive understanding of the long-term impact of positive LMX practices within the K-12 public education organization. Despite these limitations, the findings provide valuable insights into leadership dynamics and organizational behaviors within K-12 public education organizations, suggesting avenues for future research to address these limitations through more extensive and more diverse samples, mixed methods research, and exploring additional variables to enhance understanding in this area.

Implications

The implications drawn from the findings of this study hold significant relevance for practice within K-12 public education organizations. Leaders at the cabinet level must recognize the importance of building and maintaining positive relationships with their direct reports. Proximity, while advantageous for fostering open communication, requires careful navigation to avoid perceptions of favoritism. Leaders should prioritize establishing trust, collaboration, and transparent communication channels to foster ingroup dynamics and a sense of belonging among team members.

Effective communication strategies are imperative for fostering trust and organizational effectiveness. Leaders should ensure that communication channels are open, responsive, and conducive to feedback. Proactive efforts to address challenges in two-way communication and to establish a feedback loop are essential for maintaining team balance and enhancing the efficacy of leader-member exchanges. By actively listening to the concerns and perspectives of their team members, leaders can foster an environment where everyone feels heard and valued.

Alignment with organizational goals and values is critical for creating a shared purpose and fostering a positive social identity. Leaders must demonstrate transparency, appreciation for their team's experiences, and individualized consideration to build trust and a sense of belonging among team members. By articulating and reinforcing the organization's mission and values, leaders can align their teams toward common objectives and cultivate a cohesive organizational culture.

Leaders should recognize and address emotional factors that impact leadership dynamics and follower interactions. By acknowledging and managing emotions skillfully, leaders can navigate conflicts and facilitate positive interactions within the team. Trust, transparency, and individualized consideration should guide leaders in creating an environment where team members feel valued, empowered, and motivated to contribute towards shared goals. Through these implications for practice, K-12 public education organizations can foster a supportive and collaborative environment conducive to organizational health and student success.

In addition to the implications discussed, the findings of this study suggest that leadership training programs within K-12 public education organizations need to be reevaluated and adapted to address the identified challenges and opportunities. Training programs should emphasize developing relational leadership skills and building and maintaining positive LMXs. This includes training leaders on effective communication strategies, conflict resolution techniques, and methods for fostering trust and collaboration within their teams. Leadership training should incorporate modules on social identity awareness and diversity management to equip leaders with the skills to effectively navigate intergroup and intragroup dynamics. By fostering an understanding of how social identities shape perceptions and interactions within the organization, leaders can work towards breaking down silos and promoting inclusivity and collaboration among team members.

Incorporating self-reflective exercises into leadership training programs can be an effective way to help leaders improve their skills and enhance their effectiveness in navigating the challenges of K-12 public education administration. Leaders could be prompted to journal about recent interactions with their team members, focusing on moments where communication was particularly effective or ineffective, analyzing these interactions considering factors such as tone, body language, and listening skills, and reflecting on how they could have improved their communication approach. Additionally, they could engage in exercises designed to enhance their empathy and perspective-taking abilities, imagining themselves in their team members' shoes to better understand how they might perceive their leadership behaviors and brainstorming strategies for addressing their needs and concerns.

Leaders could seek feedback from their team members on their leadership approach through anonymous surveys or one-on-one feedback sessions, using this input to identify areas for improvement and set development goals. These self-reflective exercises provide valuable opportunities for leaders to enhance their self-awareness, empathy, and communication skills, ultimately improving their effectiveness in leading K-12 public education organizations and empowering them to cultivate positive relationships, foster collaboration, and drive organizational success. Incorporating such exercises into leadership training programs can significantly benefit organizational culture and performance.

Leadership training should include emotional intelligence and self-awareness modules to help leaders recognize and manage their emotions effectively. By developing emotional regulation and empathy skills, leaders can navigate challenging situations with greater resilience and foster positive relationships with their team members. Overall, reevaluating and adapting leadership training programs to incorporate these key areas can better prepare leaders to navigate the complexities of K-12 public education administration and drive positive organizational outcomes.

Recommendations for Research

Future research endeavors in this field could benefit from longitudinal studies to assess the sustained impact of positive LMX practices over time. By tracking organizational dynamics and outcomes longitudinally, researchers can gain a deeper understanding of how these practices influence organizational culture and effectiveness in the long run. Conducting comparative studies across diverse educational settings would enable researchers to explore variations in leadership dynamics and their implications for organizational outcomes. This comparative approach can offer valuable insights into the contextual factors that shape leadership practices and their effectiveness within different educational contexts.

Employing mixed methods research would allow researchers to triangulate findings from qualitative and quantitative data sources, providing a more comprehensive understanding of the complex interactions between leadership practices, organizational culture, and outcomes. By integrating both qualitative and quantitative perspectives, researchers can capture the nuanced dynamics at play within K-12 public education organizations. Incorporating perspectives from a broader range of stakeholders, including students, parents, community members, and external partners, can offer a more holistic understanding of the impact of leadership on various stakeholders. This inclusive approach can inform the development of leadership interventions that address diverse needs and perspectives within educational settings, promoting positive organizational outcomes. Additionally, intervention studies designed to evaluate the effectiveness of specific leadership development programs or initiatives aimed at promoting positive LMX practices could provide actionable insights for educational leaders and policymakers. These intervention studies would offer practical strategies for enhancing leadership effectiveness and fostering positive organizational outcomes within educational settings.

Conclusions

In conclusion, in this study, I delved deeply into the dynamics of positive LMX practices within a K-12 public education organization, shedding light on the intricate interplay between leadership behaviors, follower perceptions, and organizational outcomes. The analysis revealed that proximity, while facilitating open communication, also introduced challenges such as perceptions of favoritism, necessitating careful navigation by leaders. Participants identified effective communication channels and quick responses as pivotal for fostering trust and organizational effectiveness, highlighting the importance of proactive communication strategies in LMXs.

Moreover, followers' perceptions of leadership practices emphasized the significance of trust, collaboration, and transparent communication in fostering ingroup dynamics and a positive sense of belonging. Aligning with organizational goals and values emerged as crucial for building a shared purpose and fostering a positive social identity within the team. Despite the positive perceptions, participants acknowledged challenges related to decision-making, fairness, and emotional factors, underscoring the need for leaders to navigate these complexities skillfully.

Fostering purpose-aligned outcomes within the organizational context requires leaders to prioritize trust, transparency, and individualized consideration in their interactions with team members. By addressing challenges in two-way communication, recognizing and valuing individual experiences, and aligning with organizational goals, leaders can cultivate a supportive environment where team members feel empowered to contribute effectively towards shared objectives. Through continued research and practical implementation of these findings, K-12 public education organizations can strive towards improved organizational health and student success.

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Appendix A: Site Authorization

From: [redacted]
Sent: Thursday, February 16, 2023 3:21 PM
To: Berger, Larry
Subject: Approval for Dissertation Case Study

Good day, Mr. Berger,

In [redacted] we value continuing education and feel that your leadership case study could serve as a benefit to public education. I grant you full access to interview administration and department leaders, as well as attend and record cabinet-level meetings. [redacted] will grant you access to any documents you might need for your research. We appreciate your desire to use our district as a model for your study.

Please let me know if you need anything further.

[redacted]

[redacted]
Deputy Superintendent
[redacted]

Appendix B: IRB Approval

Date: 11-29-2023

IRB #: IRB-2023-252
Title: Cabinet-Level School Administrators Intragroup and Intergroup Identity and Positive Leader-Member Exchange Dynamics: A Single Case Study
Creation Date: 10-23-2023
End Date:
Status: Approved
Principal Investigator: Larry Berger
Review Board: ACU IRB
Sponsor:

Study History

Submission Type	Initial	Review Type	Exempt	Decision	Exempt

Appendix C: Participant Invitation to Interview

Dear ____________:

My name is Larry Berger, and I am currently a doctoral candidate at Abilene Christian University. I am conducting a qualitative case study to identify how K-12 cabinet-level leaders' attitudes and behaviors influence intergroup and intragroup identities. Would you be interested in participating?

Purpose and Participation

The purpose of this qualitative, single case study is to examine how positive leader-member exchange (LMX) practices of a South Texas K-12 public school cabinet-level administration impact collective organizational behaviors. The study will include an interview process that will last approximately 45 minutes.

Confidentiality and Voluntary Participation

All information elicited from participants in this study will be kept strictly confidential. Pseudonyms will be used for participants and locations. Only the researcher will know the identifiers of the participant. I will keep all records of interviews in a safe place to which only I will have access. Participation in this study is voluntary and confidential. You may leave the study at any time with no questions asked and no negative repercussions.

Your collaboration and willingness to participate, if you decide to do so, are greatly appreciated.

Sincerely,

Larry Berger

Appendix D: Informed Consent Form

This informed consent form is for current Texas K-12 public school administrators who are invited to participate in qualitative case study titled “Cabinet-Level School Administrators Intragroup and Intergroup Identity and Positive Leader-Member Exchange Dynamics: A Single Case Study”.

Researcher: Larry Berger, doctoral candidate **Organization**: Abilene Christian University

This Informed Consent Form has two parts:

- Information Sheet (to share information about the study with you, including the risks and benefits to you as a potential participant).
- Signature of Consent (for signatures if you choose to participate).

INTRODUCTION

My name is Larry Berger, and I am conducting research for my doctoral degree at Abilene Christian University (ACU). I am studying the difficulty cabinet-level administration have navigating intragroup and intergroup identity as they work to create positive leader-member exchange dynamics for themselves and their followers. I am giving you information and inviting you to participate in this research. You do not have to decide today whether or not you will participate. Before you decide, please read this form carefully and ask me any questions that you may have about the study. You can ask about research activities and any risks or benefits you may experience. You may also wish to discuss your participation with other people, such as a family member or trusted friend. Your participation in this research is entirely voluntary. You may refuse to participate or stop your participation at any time and for any reason without any penalty or loss of benefits to which you are otherwise entitled.

PURPOSE AND DESCRIPTION

The purpose of this qualitative case study is to identify how K-12 cabinet-level leaders’ attitudes and behaviors influence intergroup and intragroup identities. A single case exploratory study will examine how positive leader-member exchange (LMX) practices of a South Texas K-12 public school cabinet-level administration impact collective organizational behaviors. By analyzing interview data, observational data, and organizational artifacts, this study’s results may help shed light on the K-12 public school leadership development in social identity in efforts to enhance collaboration among intergroup and intragroup followers resulting in better organizational health and student success.

VOLUNTARY PARTICIPATION

Your participation in this research is entirely voluntary. It is your choice whether to participate or not. There is no compensation for participating in this study. You can withdraw from the study at any time without consequence.

RISKS AND BENEFITS

You may not experience any direct personal benefits from participating in this study, but your participation in this research is likely to help in understanding ways to better serve and support educational leadership practices. Foreseeable risks are minimal. The primary risk with this study is breach of confidentiality. However, I have taken steps to minimize this risk. See the next section on privacy and confidentiality for specific information on how a breach of confidentiality risk is being minimized. Secondary risk includes your potential discomfort in sharing personal experiences. While it can be empowering and therapeutic to share personal experiences, you do not have to answer any question or share any experience that you are not comfortable talking about. Additionally, you will be given the opportunity to review your remarks throughout the study. You can ask to modify or remove portions of your remarks if you do not agree with my notes or if I did not understand you correctly.

PRIVACY AND CONFIDENTIALITY

Any information you provide will be confidential to the extent allowable by law. Your records may be viewed by members of the Abilene Christian University (ACU) Institutional Review Board and members of the dissertation review committee. The data resulting from your participation may be used in publications or presentations, but your identity will not be disclosed. A pseudonym will be used in place of your name in any written material.

WHO TO CONTACT

If you have questions about the research study, the lead researcher is Larry Berger, a doctoral candidate. I can be contacted by calling or texting xxx-xxx-xxxx or by emailing xxxxx@acu.edu. If you are unable to reach the lead researcher or wish to speak to someone other than the lead researcher, you may contact Dr. John Harrison, my dissertation chair, at xxxxx@acu.edu. If you have concerns about this study, believe you may have been injured because of this study, or have general questions about your rights as a research participant, you may contact ACU's Chair of the Institutional Review Board and Executive Director of Research, Megan Roth, Ph.D. Dr. Roth may be reached at: (xxx) xxx-xxxx xxxxx@acu.edu.

Part II: Signature of Consent

I have been invited to participate in research about behavior and attitudes of K-12 public school educational leadership. I have read all of the information provided to me about the study, or it has been read to me. I have had the opportunity to ask questions about the study and my participation in the research, and all questions I had have been answered to my satisfaction. I voluntarily agree to be a participant in this study, do not waive any legal rights by signing this form, and understand that I will receive a copy of this signed consent form.

____________________	____________________	__________
Printed Name of Participant	Signature of Participant	Date

I confirm that the participant was given information about the study and provided an opportunity to ask questions. I affirm that all questions asked by the participant have been answered correctly and to the best of my ability. I confirm that the individual has not been coerced into giving consent, and they voluntarily agree to participate in this study. Additionally, a copy of this signed consent form has been provided to the participant.

____________________	____________________	__________
Printed Name of Person Obtaining Consent	Signature of Person Obtaining	Date

Appendix E: Interview Protocol Guide and Questions

Date: Start Time: End Time:
Interviewee:
Location of Interview:
Thank you for agreeing to be interviewed for the above research project. This qualitative case study aims to identify how K-12 cabinet-level leaders' attitudes and behaviors influence intergroup and intragroup identities. The researcher, as the primary instrument for data collection and data analysis, hopes this proposed study promotes discussion to address how leadership style and navigation of group identities affect individual and collective self-protection mechanisms that can derail purpose-aligned outcomes intended to meet shared district goals.

To facilitate my note-taking, I would like to record our conversation today. Please sign the release form. For your information, I am the sole researcher on this project, privy to the recordings, which will be completely deleted after they are transcribed. In addition, you must sign a form devised to meet the human subject requirements. Essentially, this document states that: (1) all information will be held confidential, (2) participation is voluntary, and you may stop at any time if you feel uncomfortable, and (3) I do not intend to inflict any harm.

Thank you for agreeing to participate. I have planned this interview to last up to one hour. During this time, I have a few questions that I would like to cover. I will monitor the time. There are no risks associated with your participation. Your participation is voluntary, and you can stop the interview or withdraw from the research anytime.

As a participant in this study, we will take the utmost measures to ensure confidentiality. During the interview process, the interview will be recorded and transcribed. Post-interview, you will be sent a copy of the transcript. Please review the transcript for accuracy.

The challenge of addressing leadership style and the navigation of group identity requires an assessment of leadership characteristics, behaviors, and skills and how they influence collective organizational behaviors. Your responses to the interview questions will help to answer the following questions research questions.

If you have any questions, please feel free to ask.

SemiStructured Interview Questions (Cabinet Level Leadership)

Q1: Please explain and list your direct reports job needs and barriers to success? (Identity representing, RQ1)

Q2: In what ways are leaders held accountable for delivering organizational goals? (Identity embedding, RQ3)

Q3: How do you prioritize communication and finding ways to solve organizational problems? (Identity creating, RQ2)

Q4: Give me examples of processes that support two-way communication and monitor feedback loops in the organization (Identity creating, RQ2).

Q5: What practices do you use to engage and motivate all team members? (Identity representing, RQ1)

Q6: Tell me about the ways you recognize and reward direct report efforts? (Identity implementing, RQ2)

Q7: How would you characterize your working relationship with your direct report? (Identity creating, RQ1)

Q8: What ways would your direct report defend your decision if you were not present? (Identity representing, RQ2
Q9: Explain how and what motivates your direct report to apply extra effort in their functions? (Identity embedding, RQ3)
Q10: How do you demonstrate listening to all opinions regardless of employee status? (Identity representing, RQ2)
Q11: What are the goals and purposes of your organization? (Identity creating, RQ3)
Q12: How do you work to ensure your direct report’s actions are aligned with your goals? (Identity embedding, RQ3)
Q13: How do you build organizational structures that support collaboration and alignment of effort? (Identity implementing, RQ2)
Q14: Is your strategic approach flexible? Give examples of how it is or is not flexible? (Identity implementing, RQ2).
Q15: In your organization how do you prevent ego, fear, or complacency to control the decision making? (Identity representing and implementing, RQ2 & RQ3)

Semistructured Interview Questions (Direct Reports)

Q1: Explain how well your leader understands your job needs and barriers to success? (Identity representing, RQ1)
Q2: In what ways are your leaders holding others accountable for delivering organizational goals? (Identity embedding, RQ3)
Q3: How does your leader prioritize communication and finding ways to solve organizational problems? (Identity creating, RQ2)
Q4: Give me examples of processes that support two-way communication and monitor feedback loops in the organization (Identity creating, RQ2).
Q5: What practices does your leader use to engage and motivate all team members? (Identity representing, RQ1)
Q6: Tell me about the ways your leader recognizes and reward direct report efforts? (Identity implementing, RQ2)
Q7: How would you characterize your working relationship with your leader? (Identity creating, RQ1)
Q8: How do you defend leadership decision if you they are not present? (Identity representing, RQ2)
Q9: What motivates you to apply extra effort in their functions? (Identity embedding, RQ3)
Q10: Do you believe your leader demonstrates listening to all opinions regardless of employee status? Why? (Identity representing, RQ2)
Q11: What are the goals and purposes of your organization? (Identity creating, RQ3)
Q12: Are your leader’s actions and behaviors aligned with organizational goals? With your goals? (Identity embedding, RQ3)
Q13: What impact does your leader have on building organizational structures that support collaboration and alignment of effort? (Identity implementing, RQ2)
Q14: Is your leader’s strategic approach flexible? Give examples of how it is or is not flexible? (Identity implementing, RQ2).

Q15: Does your leader prevent ego, fear, or complacency from controlling the decision-making process? How? (Identity representing and implementing, RQ2 & RQ3)

Closing the interviews:

Participants will be reminded the interview will be transcribed and returned to the participant within three days to allow for member checking. Participants will be asked to review transcribed interviews to ensure the validity of transcribed responses and asked provided feedback within 3 days. Participants will also be reminded that responses and identity will remain confidential. A thank you note will be sent to all participants after member checking is received. The transcribed interviews will then begin the process of coding outlined in this study.

Appendix F: Observation Grid

Observation Grid: Pre-Selected Department Meetings			
Site Location:	Date:	Start Time:	Stop Time:
SIT Framework	Descriptive Notes	Reflective Notes	Reflexive Notes
Identity Representing Observed Yes or No			
Identity Creating Observed Yes or No			
Identity Implementing Observed Yes or No			
Identity Embedding Observed Yes or No			

Appendix G: Cabinet-Member Initial Codes

Accomplishments	Equitable Treatment	Problem-solving
Accountability	Evidence-Based Practices	Professional Development
Adaptability	Feedback	Purpose Creation
Alignment	Finance	Recognition
Change Management	Flexibility	Relationships
Collaboration	Flexibility in Approach	Resistance Management
Communication	Goals	Resources
Communication Openness	Identity Shift	Responsibility
Communication Systems	Inclusivity	Rewards
Constraints	Individual Recognition	Root Cause Identification
Continuous Learning	Individualized	Structural Changes
Data Utilization	Information Flow Management	Support
Data-Driven	Information Management	Supporter
Decision Defense	Information Sharing	System Evaluation
Decision-making	Intrinsic Motivation	Team Management
Development	Leadership	Teamwork
Development Planning	Listening	Transparency
Distribution	Measurement	Trust Building
Efficiency	Motivation	Two-Way Communication
Ego	Organizational Structure	
Employee Engagement	Perspectives	
Engagement	Praise	
Engagement Strategies	Prevention	

Appendix H: Direct Report Codes

Accountability	Guarded	Shared goals
Adaptability	Higher leadership	Shared identity
Adjusting	Inclusivity	Siloed period
Appreciation notes	Influence	Silos
Assumptions	Ingroup Dynamics	Social Categorization
Belonging	Ingroup favoritism	Social Identity Formation
Breaking down silos	Innovation	Specialists
Challenges	Integrity	Strategy
Character	Job needs	Strengths
Clear communication	Lack of awareness	Student success
Closed communication style	Leader-member relationship	Supervisor
Closer relationship	Leadership	Supervisor's transparency
Cohesion	Leadership Decisions	Supportive
Collaboration	Leadership dynamic	Task-oriented
Communication	Leadership moments	Team member
Confidence	Learning	Transition
Curriculum audit	Loyalty	Transparency
Decision-Making	Mediation	Trust
Different levels	Motivation	Trust
Direct reports	Motivational strategies	Trust-building
Diverse relationships	New leader	Two-Way Comm
Dominance	Open and honest communication	Understanding
Effective communication	Open communication	Unifying purpose
Ego	Open dialogue	Unique needs
Ego Management	Organizational Alignment	Values
Emotions	Organizational goals	Work Ethic
Equilibrium	Organizational values	
Equity	Outgroup Dynamics	
Evolving nature of communication	Positive working environment	
Extensive understanding	Preventing complacency	
Fairness	Proximity	
Familiarity	Recognition	
Fear	Recognizing efforts	
Feedback	Relationship	
Feedback loops	Relationship Building	
Flexibility	Relationship Quality	
Former leader	Resolution	
Fostering buy-in	Responsive	

Appendix I: Cabinet-Members Categories

Accountability for Organizational Goals	Listening to Opinions
Adaptability and Flexibility	Managing Information Flow
Alignment of Actions with Goals	Managing Resistance to Change
Building Trust and Transparency	Measurement and Evaluation
Change Management and Adaptation	Motivating Team Members
Collaboration and Teamwork	Open Communication and Feedback Loops
Communication and Information Management	Organizational Goals and Purpose
Communication Systems	Organizational Structure and Processes
Continuous Learning and Growth	Preventing Ego, Fear, and Complacency
Creating a Sense of Purpose	Prioritizing Communication
Data Analysis and Utilization	Problem-Solving Approaches
Data-Driven Decision Making	Professional Development and Improvement
Defending Decisions	Professional Development Planning
Direct Reports	Recognizing and Rewarding Performance
Efficiency and Effectiveness	Recognizing Individual Needs
Employee Engagement and Motivation	Shifting Organizational Identity
Engaging Employees	Strategic Flexibility
Equitable Treatment	Supporting Decision-Making
Evidence-Based Practices	System Evaluation and Improvement
Flexibility in Approach	Transparency in Communication
Identifying Root Causes	Trust Building
Implementing Structural Changes	Two-Way Communication
Information Sharing	Working Relationships
Intrinsic Motivation	

Appendix J: Direct Report Categories

Openness to All Opinions	Lack of Defensiveness
Window for Discussion	Need for Adaptability
Alignment with the Leader’s Actions	Open-Door Policy
Analytical Approach	Openness to Feedback
Approachability	Personalized Recognition
Awareness of Challenges with Silos	Positive Reinforcement
Challenges with Silos	Proactive Approach
Clarifying the Purpose of Decisions	Proactive in Addressing Complacency
Collaboration	Problem-Solving
Efforts to Break Down Silos	Recognition of Common Goals
Equal and Shared Accountability	Regardless of Status
Fair Treatment	Seeking Information
Flexibility	Sense of Purpose
Focus on Why	Shared Understanding of Goals
Fostering a Collective Identity	Strong Sense of Trust
Fostering Inclusivity	Team Building
Handling Disagreements Constructively	Team Building
Immediate Follow-Up	Two-Way Communication
Inspire Team Members to go the Extra Mile	Understanding of Diverse Backgrounds
Integrate Diverse Perspectives	Value for Different Perspectives
Involvement without Micromanaging	