Sociological Teaching

The Case for Leadership [Education] in Social Movements: Transformative Leadership as a Framework for Creating Movement Leaders

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Abstract

While there is a breadth of work on leadership of social movements in the existing literature, and that leadership development is foundational to building capacity within those movements (Ganz & McKenna, 2018) what is missing is the conceptualization of what the training and development of that leadership could look like. When examining the leadership theories in both academic and popular press texts, scholars identify a prevailing lens that centers white, masculinized, euro-centric schools of thought that are tied to materialism and commodification (Dugan, 2017; Noble et al., 2022; Rost & Barker, 2000) which make them insufficient to address the preparation of, and contrary to the aim of, social movement leaders. In this manuscript we offer transformative leadership (Shields, 2010) and the Transformative Leaders Identity Model as an alternative paradigm. Coupled with the appropriate pedagogical strategies discussed herein, this has been demonstrated as an effective way for prospective social movement leaders to develop the skills necessary to engage in the work.

Keywords: transformative leadership, leadership for social movements, leadership pedagogy

Introduction

The rise of neo-fascism and alt-right nationalism, threats to voting rights, bodily autonomy, and access to health care and education, the rising cost of living juxtaposed with stagnant wages, rising seas, melting ice caps, and severe weather incidents. Each of these alone are cause for protest and participation, but together,

create a maelstrom in inequality, poverty and violence. The call for change is loud and persistent, in the halls of governments and in the streets.

Social movements, then, are the answer to that call. Rochon (1998) describes social movements as the result of a determined collective to espouse new public values, gather a groundswell of support for those values and then mobilize the political, cultural, and economic power of that groundswell to enact those values. But who leads those movements can be as important as the movement themselves (Reger, 2007).

The role of leadership in social movements has long been identified as an area where more study is needed (Aminzade et al. 2001; Barker et al. 2001; Ganz, 2010; Ganz, 2018; Klandermans 1989; Melucci 1996; Morris 1999; Morris & Staggenborg, 2004; Reger 2007; Zurcher and Snow 1981). Ganz (2018) catalogs that scholars have stepped up with contributions to the literature in political science (Burns, 1978), labor studies (Edelstein and Warner 1976; Ganz et al. 2001; Lipset 1950; McAlevey 2016; Nyden 1985; Voss and Sherman 2000), community development (Christens and Speer 2015; Orr 2007; Schultz and Miller 2015; Walls 2015; Warren 2001), business (Avolio, Walumbwa, and Weber 2009; Bennis and Nanus 2007), and organizational behavior (Bennis, 1989; Eisenmann, et al., 2013; Heifetz 2004; Nohria and Khurana 2010; Senge 1990); however, Gomez-Roman & Sabucedo (2014) suggest that the study of social movements would benefit from an analysis of different ways that leaders can trigger social change and create environments where people can be activated to join those movements.

The essential nature of leadership within social movements is widely documented but the lens through which scholars have troubled the topic of leadership varies (Morris & Staggenborg, 2004). Eichler (1977) cataloged that the most common way to approach the problem of leadership in social movements was, at the time, to create archetypes of leaders and then sort those leaders into which types they most closely fit. Their fellow scholars followed that paradigm (Roche and Sachs 1969; Turner and Killian, 1957; Wilson 1973). More contemporarily, Nepstad & Clifford (2006) argue that while descriptive categories of leaders can provide a general picture of the particular individual, they say nothing about whether that individual is capable or compelling.

Other authors have conceptualized leadership of social movements as behavior(s); Balancing "criticality with hope" (Brueggemann, 2001), building a coalition and then activating that coalition (Ganz, 2002); forming relationships that link individuals, networks, and organizations (Ganz, 2010), strategic decision-mak[ing]... inspir[ing] and organiz[ing] others to get involved (Morris & Staggenborg, 2004),and accept[ing] responsibility that enables others to achieve shared purpose amid social, economic, and political uncertainty (Ganz, 2018).

While it is widely acknowledged that leadership development is central to movement capacity building (Ganz & McKenna, 2018) and that leadership must "... be learned through education and the trial and error experience of activists as the movement unfolds" (Obershall, 1973, pg. 158) what is missing from the literature is a road map for what that development could look like.

Transformative Leadership

Astin and Astin (2000), direct that

> "...the value ends of leadership should be to enhance equity, social justice, and the quality of life; to expand access and opportunity; to encourage respect for difference and diversity; to strengthen democracy, civic life, and civic responsibility; and to promote cultural enrichment, creative expression, intellectual honesty, the advancement of knowledge, and personal freedom coupled with responsibility," (p. 11).

However, much of the leadership theory found in both academic and popular press texts centers a white, masculinized, Western-Eurocentric lens that is innately tied to capitalism, materialism, and the commodification of people (Dugan, 2017; Noble et al., 2022; Rost & Barker, 2000) making these theories, and the skills and behaviors which they prescribe, incongruent with the aim of social movements.

Transformative leadership (Shields, 2010) offers an alternative view of leadership in both aim and scope. Characterized by its "activist agenda and overriding commitment to social justice, equality, and a democratic society" (van Oord, 2013, p. 422) transformative leadership is "a critical leadership theory that focuses explicitly on inclusion, equity, excellence, and social justice" (Shields and Hesbol, 2020, pg.4) that answers the call laid down by Astin and Astin. Drawing on leadership for social justice (Brooks et al., 2017; McKenzie et al., 2008; Theoharis,

2007) and culturally relevant leadership (Khalifa, 2018), transformative leadership is based on two grounding premises:

> [...] whenever participants in an organization feel disrespected, excluded, or marginalized, are worried about how they will be treated, or what failure might mean for their social or cultural group, they will be unable to work to their full potential, to fully participate, and hence, their individual achievements will be limited. [...] when people are both encouraged and enabled to participate fully in the deliberative processes and actions of an institution or organization, capacity and civic participation are developed, and our very democratic society is strengthened" (Shields, 2020, pp. 7-8).

Transformative leaders must be committed to values and outcomes that serve the long-term interests of society (Caldwell, et al., 2012) positioning them not as drivers of efficiency or effectiveness, but of justice, equity, and liberation. When a leader makes and upholds these commitments, they are required to re-frame their worldview and their sense of self in order, re-thinking previously held assumptions and developing more just systems (Christensen and Raynor, 2003; Pava, 2003; Quinn 1996). In doing so leaders must recognize and accept their role in moving society toward justice and inclusion (Astin & Astin, 2000; Brooks et. al, 2008; Noble, 2015; Shields, 2010).

Eight tenets help leaders work towards these values, and in doing so, create a more socially just, inclusive and equitable society, thereby transforming our world:

- *a mandate to effect deep and equitable change*
- *the need to deconstruct knowledge frameworks that perpetuate inequity and injustice and to reconstruct them in equitable ways*
- *the need to address inequitable distribution of power*
- *an emphasis on both public and private good*
- *a focus on democracy, emancipation, equity and justice*
- *an emphasis on interconnectedness, interdependence, and global awareness*
- *the necessity of balancing critique and promise, and*
- *the call to exhibit moral courage (Shields, 2016)*

Shields (2020) describes the tenets not as prescriptive behaviors, or a checklist to follow, but as ways in which leaders should "ground their practice" (p.8). Transformative leaders may or may not hold formal positions of power, are in

organizations of all shapes, sizes, and with a myriad of missions, engage in on-going critical self-reflection, dialogue with others– maybe especially when those others disagree, are willing to confront injustice and those systems that perpetuate it with consistent and intentional action. In this way, transformative leadership is a natural fit for the aims of social movements and for social movement leadership development (Bruce & McKee, 2020; Shields, 2020).

Leadership Pedagogy

In much the same way that leadership finds its way into the literature in several fields, only some of which are mentioned above, leadership education can be found in a variety of spaces both formal and informal, at all educational levels and beyond, and housed in many varied disciplines and interdisciplinary homes (Huber, 2002; Elmuti et. al, 2005). And while that variation is evident in content, strategy, and targeted learner, Rost and Barker (2000) rightly point out that there are some commonalities of note.

The 20th century approach to leadership education is industrial in concept because it has incorporated the values and assumptions that predominate in the industrial paradigm. Specifically, leadership education has presumed top-down, hierarchical structure; it is goal oriented, where the goal is defined by some level of organizational performance; it focuses on bureaucratic efficiencies; it is centered on self-interest; it is founded in materialism; it is male (or male characteristic) dominated; it uses utilitarian ethics; and, it uses quantitative methods to solve rational/technocratic problems. The industrial view of leadership can be defined as "great men and women with certain preferred traits who influence followers to do what the leaders wish in order to achieve excellence defined by organizational goals" (Rost,1991, p. 95)" (p. 4).

Although an argument can be made that in some circumstances these pedagogical strategies and the theories from which the spring, have worked just fine, "the times…they are a changin" (Dylan, 1964) and "[l]eadership pedagogy can either assume a white male frame and reinforce existing structures which uphold dominance or train diverse leaders as advocates and activists who dismantle them

for the greater good of all" (Tilghman-Havens, 2020). This will require a radical change in our pedagogy.

Paolo Friere (1970/2018) advocates for critical liberatory pedagogy, postulating that it is the only way by which both students and teachers can elevate their own consciousness to identify and dismantle the systems that, ultimately, keeps all people in a cycle of oppression (Sayles-Hannon, 2007). Tarlau (2014) reminds us that "the roots of critical pedagogy are in community struggles for social change" (p.369) where a strong through line exists between pedagogy and social movements but admonishes that those pedagogies use "language of resistance" without a going so far as to show people how to put that language into the action of reform and change.

Unfortunately, leadership education programs have, historically, been woefully unprepared to address issues of justice and equity as they relate to leadership development (Brown, 2006). This is not a surprise considering its root. And the traditional "signature" leadership education pedagogies of case study, class discussion, or self-assessment with traditional leadership instruments (Jenkins, 2012) fall woefully short of this goal. As scholars who find themselves at the apex where leadership development meets social movements then, it became clear that new strategies were required. The model proposed below is a strategy rooted in contemporary social movements and organizing while being grounded in and guided by the theory of transformative leadership.

A New Model of Leadership Development for Social Movements

Dynamic. Relational. Participatory. Collective. Community. These characterizations of social movements are found extensively in the literature (Ganz, 2002; Ganz, 2010; Rothschild-Witt, 1979; Schiflett & Zey, 1990). As such, it makes sense that the critical pedagogy used to engage the development of movement leaders must also reflect that characterization. We believe that there are three essential components to that critical pedagogy.

Those engaged in social movements for justice and equity know that there is no lack of work to be done to address the pressing problems confronting us. But the sheer volume of that work can sometimes be daunting, even when an individual feels

called to engage in change. Being able to see progress not just in addressing the issue, but in one's own development can be a strong motivator to continue engaging in the work. It can also be a key factor in encouraging the development of leadership self-efficacy. This is why providing opportunities to develop and enact new identities related to transformative leadership and social justice work is foundational to the pedagogy. Project-based learning (PBL) is a natural mechanism of skill development for transformative leadership, engaging burgeoning leaders in the action of social movements (organization, strategy, networking, relationship building, amplification of messaging) while still maintaining the safety net of the learning environment as those skills develop. In conjunction with PBL, Communities of practice make for a fruitful training ground, giving learners a chance to observe the work of (in this case) justice and equity while learning the requisite skills and then, eventually, engaging others (Bruce et al, 2019, McKee & Bruce, 2018).

Identity Development for Transformative Leadership for Social Movements

When we initially conceptualized this model, and began doing this type of leadership education, we envisioned a four stage continuum where individuals began their development as learners, and through time, engagement, networking, skills development, and growth in self-efficacy, would take on ever increasing public identities of ally, advocate, and/or activist. The continuum was meant to be fluid, such that as issues and contexts change, a learner would have developed skills and behaviors in all identities and would feel confident in identifying the appropriate way to "show up" (Bruce, et al., 2019) and then respond accordingly.

We used the continuum and its associated curriculum to engage five cohorts of prospective student leaders over five years in the development of these skills and the enacting of these identities, with significant success (McKee & Bruce, 2021). The continuum "...supported the development of transformative leadership and greater justice , with less bigotry and bias that animate power differentials…" (Mohr & Hoover, 2020, p. 75). But reviewing the curriculum at the five year mark in light of the ongoing COVID-19 pandemic, the death of George Floyd and the continuing racial injustices in the U.S., and the January 6th insurrection at the U.S. Capitol, we recognized that the context in which individuals and organizations were doing justice

and equity work was changing and we had to change with it. We spent time in critical self-reflection appraising our own work and learned more about the work of others, and as we did, it became clear that a reconceptualization of the model was needed and an additional layer was added– accomplice. The revised transformative leadership identity model (previously the student leader activist identity continuum) is captured in the image below (see Fig. 1).
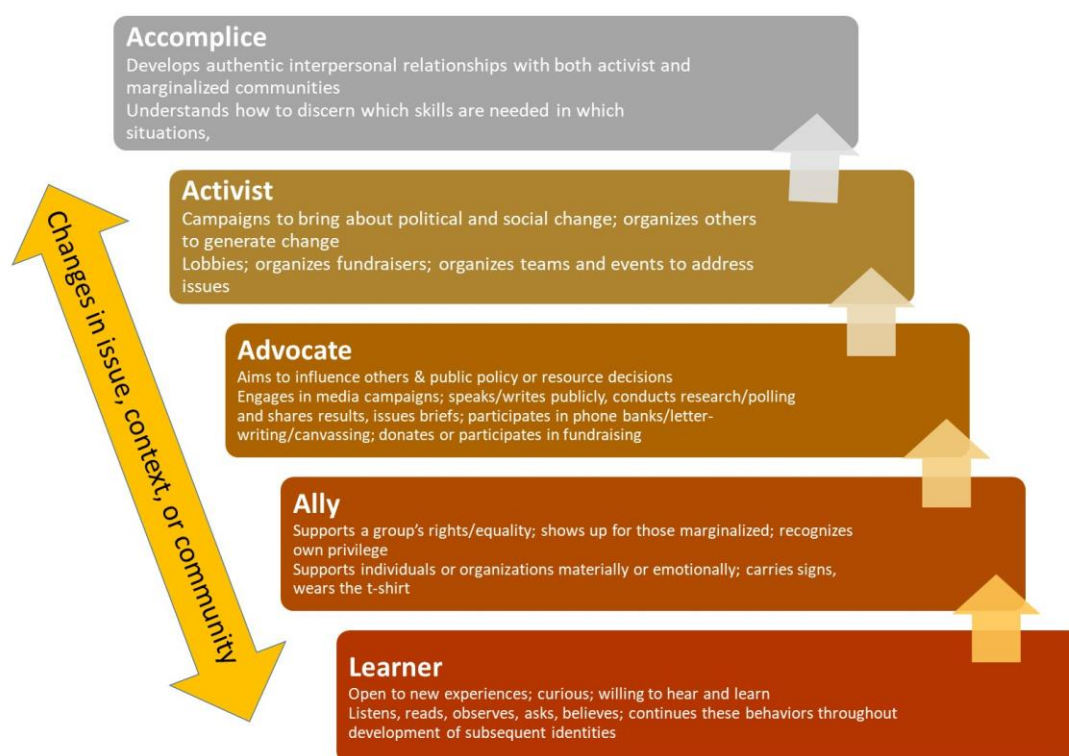

Figure 1. Transformative Leadership Identity Model.

Learners are the most private of the identities as learning does not require the engagement of others, necessarily, to reach intended outcomes nor are the behaviors necessarily visible or performed in public. Willing to engage in critical self-reflection to uncover and interrogate the conscious, unconscious, and subconscious biases they hold, learners gain knowledge about themselves and the world around them. In revealing the outcome of gaining this knowledge (Brown, 2006; Dunn, 1987; Senge, 1990) they name and take accountability for the impact of their thoughts and behaviors on others, most especially when that behavior has contributed to othering based on perceived differences (Mohr & Hoover, 2020). We believe that accountability can, and should lead to the desire to do something with the new knowledge gained as

individuals commit to something bigger than themselves. In doing so, the individual consciously chooses to take on a more visible identity and its associated skills and behaviors (Bruce et al, 2019).

When centering learning for the purpose of leadership for social justice movements Mohr and Hoover (2020) suggest that all learning must start from a place of openness and a desire to listen. Once established, critical reflection using autobiographies, prejudice reduction workshops, and journaling (Brown, 2004) can be a catalyst for further personal development and the uncovering of the stories that we have been told and tell ourselves about who we are and how we relate to others.

Allies support those individuals from communities which have been historically marginalized with the goal of ending the oppression and marginalization (Washington & Evans, 1991). Necessarily, these identities require more public displays because it is only when acting in concert with others (Trueba, 1999), in showing up (Bruce et al. 2019), can you ally. Passive allyship might include wearing/displaying social justice related merchandise (eg. clothing, buttons, stickers or bumper stickers) to convey support (McKee & Bruce, 2018). More active allyship requires remaining a supportive secondary role including attending events, meetings, or services at the invitation, and in support of, a marginalized individual, supporting others as they share the impact of their marginalized identities, listening to and engaging with others (McKee & Bruce, 2018).

Benevides et al. (2020) described mindfulness as a way to connect with self and others, exercises in active listening, storytelling and understanding what and how privilege operates as a way to encourage the development of ally identities. Exercises in identifying social location can be helpful for exploring intersectional identities, understanding how visible and invisible identities interact in systems of oppression. Activities that engage in skill building around interfacing with others, (eg. difficult conversations) can be of additional support for individuals wanting to be allies.

Advocates interface with others about an issue; communicating, educating and influencing those around them with the urgency that meets the moment (Ganz, 2009) which requires more visibility. The goal of this interface is to come together to change the existing oppressive systems and institutions creating more just and equitable communities (Jason et al, 2015). The skills of advocacy are built on the skills of

learners and allies. Advocates build long term relationships with marginalized groups and work for the interests of those groups for the purposes of creating social change (Glidewell, 1984). In this public role, advocates phone bank or canvass mobilizing others, fundraise, and speak or write about causes– particularly in spaces that are not accessible to marginalized people (Bruce et al, 2019).

Developing strong interpersonal communication, strategic messaging, targeting a potential message to a specific audience to apply the appropriate strategy, and risk assessment are all examples of the kinds of skills required of advocates (Bruce and McKee, 2020). The urgency of the issues we face require change strategies at all levels, but in a post 2020 world, it becomes even more important to not lose sight that one of the most important roles of an advocate is as educator. Individuals must be able to craft a message that combines a logical, well-reasoned, evidence based argument, with a compelling emotional appeal, and then be able to mold and shape that message to resonate with a variety of audiences that could be influenced to join in a change effort.

Activism is the cornerstone of social change. Thousands of examples, throughout the course of human history, mark the moments when people have come together, motivated by common purpose, to force individuals, organizations, governments, and society to shift in a more just and equitable direction. Activists, by definition then, activate others (McKee and Bruce, 2020), bringing them along in the pursuit of that positive social change. Where advocates may be participating in those very public activities noted above, activists are strategizing, organizing, and leading those activities (Ganz, 2009; Trueba, 1999). Activism is as much the attempt to lobby for legislation and influence policy makers as it is to move the conscience of the public. As such, it runs the gamut from organizing a phone bank to gathering thousands in a march for justice.

Because, many times, the word activism brings to mind people carrying picket signs or yelling into bullhorns, it is key that individuals are provided with a buffet of activist activities (McKee & Bruce, 2020) to understand the wide array of options available, and more importantly to hone their skills in understanding how to apply the appropriate activities to a given situation. As we say, not everything requires a bullhorn. Activism mapping (McKee & Bruce, 2020), or developing a strategic plan for

your work, is another way that new activists can build skills in networking, connecting, and mobilizing others. It also reinforces the need to have a well thought out plan, and have a viable secondary and/or tertiary plan in place as you organize others.

Accomplices challenge systemic and institutional oppression in interpersonal interactions and in its institutional manifestations (Powell & Kelly, 2017; Suyemoto et al., 2021). By necessity, the most relational of the identities, accomplices also engage in the most risk taking, both interpersonally and institutionally as they leverage their own power and privilege to amplify the work and voices of the most marginalized. Engaging as an accomplice is deeply intimate, requiring the individual to understand the nuance and nature of situations, such that they can evaluate and respond with the appropriate behaviors needed of them in the moment.

Instructional strategies for engaging in accomplice behaviors require a deeply reflective pedagogy. Building on the skills gained in the prior identities, accomplices engage in continuous, critical self reflection with mentors and with the communities with whom they are working, ensuring that their motives, behaviors, and goals are aligned.

Project-Based Learning

The use of project-based learning (PBL) demands that students address, head-on, a real world problem (Adderley et al., 1975) that requires independent work, decision-making and problem solving while engaging in simultaneous parallel formal instruction (Morgan, 1983). Going beyond what Guile & Griffiths, 2001) proposed as a three way partnership, PBL for transformative leadership development requires that transformative leaders-in-development create networks between themselves, the individuals most impacted, individuals and organizations already engaged in doing related work, and their learning facilitators. By placing students "in the thick" of an issue, they are positioned to develop identities in line with individuals also addressing those issues (Bruce, et al., 2019).

In practice, when engaging in PBL with specific designs to influence leadership identity development, facilitators should be prepared to provide multiple opportunities for "provocative class discussions, reflection on critical incidents, controversial readings, dialogic teaching, discourse communities, a pedagogy of hope,

and action plans (Brown, 2004; Brown, 2006; Trueba, 1999)" (Bruce, et al, 2019). Additionally, when using PBL for transformative leadership development, facilitators must get to know their students such that students feel empowered to share the issues about which they are most passionate and on which they want to work. This relational piece is particularly key here, because so often when individuals engage in social justice work, they are doing so out of an urgency for themselves or someone about which they care. Disclosing that information is, without the proper relationship building, high risk for the student. Further, PBL also requires that the facilitator have some knowledge of the individuals, groups or organizations working on social justice issues so that they are positioned to provide appropriate guidance and connections for the students.

Communities of Practice

Learning the skills of transformative leadership for social movements within a community of practice (CoP) has two significant advantages. First, a CoP space provides opportunities for networking, coalition building, organizing, and skill development in concert with others who are doing the same (Lave & Wenger, 1991; Wenger 1998). Being in concert with like-minded individuals provides a sense of common purpose and belonging essential for development. Second, as an individual intentionally and routinely engages with the CoP, in formal and informal ways, their identity begins to align with the CoP creating greater self-efficacy in the practice (Lave & Wenger, 1991; Wenger 1998). The CoP supports the formal learning of its members by providing access to the most pressing issues, authentic engagement in the organization and mobilizations for those issues, and opportunities for growth, regardless of where members find themselves in their learning journey (Lave & Wenger, 1991; Wenger 1998). Perhaps more importantly, the CoP becomes a space of sustenance and renewal that is particularly important in justice and equity work where individuals often find themselves facing burnout and compassion fatigue because of the nature of the work.

Facilitators connect students to groups already engaged in working on issues about which they are passionate. This could look like a very formal organization (eg. In the U.S. Moms Demand Action, National Alliance on Mental Illness, The Human

Rights Campaign, etc) or a less formal network of individuals (eg. in the U.S. student groups, local abortion funds or charitable organizations). The student then attends meetings, training or events, gets on mailing lists to receive educational resources and group announcements. This positions them as legitimate peripheral participants in the Lave & Wenger (1991) model. As skills and confidence grow so does participation. Allies move toward greater expertise, advocate and activist further align with the organization/movement community as journeymen, and finally as experts/accomplices when holding a central role in the community or movement (Bruce et al., 2019; Lave & Wenger, 1991; Wenger, 1998).

Connecting the Transformative Leadership Identity Development Model and Related Pedagogies to Social Movements

Obershall (1973) posited that there are people willing to lead social movements, but that those individuals will need opportunity, education and real-life experiences to do so. The model we propose, and the associated pedagogies, can be a road map for engaging individuals in the education and experiences Obershall referenced, such that they will be ready to lead when opportunity presents itself.

Gläser (2004) proposed that social movements are "communit[ies] whose identity is based on the perception of a common goal" (p.7). They go on to propose three similarities between social movements and communities that are important for our purposes here. First, social movements have organization. While the role of identity in feeling a sense of belonging in any group or community is uncontested, Gläser purports that it is only through organization can collective action occur. Second, there is stratification within the movement community. There are distinct roles within movements that are held by those most experienced, with the most networks or connections, the greatest resources, or a combination thereof. And third, the overlap of membership among communities. Belonging to one community or social movement does not preclude your membership in another, and in many ways membership in multiple communities might equally enhance one another.

These commonalities between social movements and communities provide the foundation for the use of CoP to engage in the training of social movement leaders.

Communities of practice for leadership development are organized and structured, those new to study of leadership for social movements (the CoP) would be able to identify the organization as an entity. The stratification of CoPs from peripheral participants to experts mirrors that of social movement communities. Moreover, the roles in a CoP are clearly defined, with parameters for participation that allow for growth and development. And finally overlap of membership is realized as an individual identifies themselves as a learner of leadership while growing in skill set in parallel to their participation in a CoP related to a social movement which opens the door to enjoining the identity of leadership learner with social movement participant.

The Transformative Leadership Identity Model provides direction for the stratification of the CoP because of the clearly defined roles and corresponding increasing knowledge and public behaviors. Engaging the prospective leaders in PBL to learn the skills while inculcating them in the CoP is the authentic, real-life experience that these individuals need to try the skills they are learning to address problems of justice and equity in existing social movements.

Using the Model

We have used the model with success in an undergraduate setting at a large, primarily white institution (PWI) in the U.S. (Bruce, et al, 2019; McKee and Bruce, 2020). Our program model is one year in length, and using CoP and PBL, and a curriculum grounded in transformative leadership, our students move from learners through activist identities while tackling a problem of social justice about which they are passionate. In five years, examples of student advocacy and activism projects include for greater gun violence legislation, changes in SNAP benefits making it more accessible for H2A workers and families, for sick leave and health insurance for H2A workers, access to educational opportunities for reentering citizens, and expansion of rural broadband access to address educational access.

Additionally, we have had several students return to the program for a second, and in some cases, a third year. As mentioned above, these students were, in part, the impetus for the addition of accomplice to the model. These students have sought work with greater depth, have engaged in research and assessment of their advocacy

efforts, and connected with social justice organizations for internships or other service work necessitating prolonged engagement in these communities or organizations. Their relationships with activist communities in these ways, both broader and deeper than those of our first year students, are demonstrative of the interpersonal nature of the accomplice roles.

Ideas for the Future

The Transformative Leadership Identity Model is an effective way to engage undergraduate prospective social movement leaders in the learning of transformative leadership, a leadership paradigm that adequately addresses issues of justice and equity. This aligns well with Nepstad & Smith's (1999) notion that leadership of social movements is often the purview of the young, (eg. Rep. John Lewis and the A&T Four in the United States).

However, there is more work to be done than can be the purview of a single group. We believe that this model could be adapted and used, with success, with other adult audiences. Additionally, while the paradigm of transformative leadership addresses interconnectedness, interdependence, and global awareness, a more explicit test, and the inculcation of norms and in other cultures is necessary.

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