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# Collective dimensions of leadership: Connecting theory and method

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## Abstract

In this introductory article we explain the impetus for creating the Special Issue, along with its goals and the process by which we created it. We present a map of the terrain of collective leadership (CL) that builds on earlier frameworks, recognizing that the terrain is expanding and has become increasingly difficult to traverse. The map is comprised of two axes or dimensions. The first axis, the ‘locus of leadership,’ captures how scholars conceptualize *where* to look for manifestations of leadership. That is, does the leadership reside in the group or does it reside in the system? The second axis is the view of ‘collectivity’ that plots *how* scholars conceptualize the collective. Do they see it as an empirical *type* of leadership or a theoretical *lens* through which to study leadership? We then plot distinctive CL research into four cells, providing definitions and references to empirical work emblematic for each cell. In introducing

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and summarizing each of the five articles we have selected for this Special Issue, we show where each of these is located on the CL research map, and distil how each provides a clear connection between theory and method in a way that advances our understanding of CL.

### **Keywords**

Collective leadership, distributed leadership, leadership research methods, plural leadership, shared leadership, relational leadership

### **Introduction**

Collective leadership (CL) represents an emerging theoretical umbrella that captures diverse scholarship on the shared, distributed, pooled, and relational aspects of leadership, its emergence and relation to hierarchical leadership, as well as its impact on work and performance (Bryman et al., 2011; Denis et al., 2012; Uhl-Bien and Ospina, 2012; Yammarino et al., 2012). Unfortunately, as we noted in the Call for Papers for this Special Issue, though CL scholarship has blossomed, theory has outpaced empirics. In fact, defining, measuring, and documenting CL has proven to be quite challenging. It is not easy to translate the assumptions of a collective lens on leadership into sound research design decisions and practices, what some call indication of method (Dodge et al., 2005; Gaskell and Bauer, 2000). We noted that traditional methodologies are often less appropriate once the assumptions of ‘collectivity’ in leadership are taken seriously. Indeed, multiple and often more sophisticated methods are required in order to conduct CL research (Kempster et al., 2016).

We also noted that those who have individually advanced the theoretical promise of various brands of CL now must work collectively to clarify appropriate theory–methods connections, if we are to advance knowledge on CL. What we needed, dare we say it, was some CL among the CL scholars. There was a valiant attempt to do this very thing, through the international CL workshops that were held by the Co-Lead Net<sup>1</sup> in 2014, 2015, and 2016 (which generated the idea of organizing a Special Issue), and through the ensuing workshops in 2017 and 2018 (where the conversations deepened). These workshops led to the identification of the most significant methodological concerns that were perceived to be holding back CL research. These concerns, in turn, became the impetus for this Special Issue.

The Special Issue aims to deepen scholarly understandings of the social and relational dimensions of leadership in contemporary institutions through an in-depth exploration of the theoretical and methodological challenges of doing empirical research with a CL approach. The following three specific goals were identified. First, we seek to identify and to map diverse CL streams in an integrative framework that helps guide theory–method decisions when conducting or assessing CL scholarship. Second, we seek to promote consistency in theoretical and methodological choices in CL scholarship by documenting strategies and solutions to address the challenges of matching lens to method in empirical research. Third, we aim to deepen the quality of the dialogue among organizational scholars with diverse CL perspectives by requiring that theoretical and methodological choices, as well as the reasoning behind their consistency (including paradigmatic lens), be made explicit.

**Table 1.** A map of collective approaches to leadership.

		View of collectivity	
		Collective leadership as type	Collective leadership as lens
Locus of leadership	Leadership residing in the group	Cell 1: <i>'Collective' refers to plural forms of leadership and leadership resides in interpersonal relationships</i> Dual/co-leadership Shared leadership Social network leadership Team leadership	Cell 3: <i>'Collective' refers to a theoretical lens and leadership resides in interpersonal relationships</i> Practice theory studies (including leadership-as-practice) Relational leadership
	Leadership residing in the system	Cell 2: <i>'Collective' refers to plural forms of leadership and leadership resides in systemic dynamics</i> Multiteam systems leadership Distributed leadership Network leadership Collective leadership practices Complexity leadership	Cell 4: <i>'Collective' refers to a theoretical lens and leadership resides in systemic dynamics</i> Collective constructionist leadership Discursive/communicative leadership (some) Critical leadership studies

Source: Authors' elaboration.

Though we knew that CL had become a rich and vibrant research area, the sheer volume of articles submitted in response to our Call for Papers pleasantly surprised us. We received a total of 52 articles, which covered the gamut of empirical, conceptual, and reflective articles that explored the collective dimensions of leadership and explicitly took on the challenge of matching theory and method. Through a rigorous, intensive, and yet highly generative review process, we eventually selected the five articles we are proud to feature in this Special Issue. These articles deliver on at least one, if not all, of the three goals that we set for the Special Issue. We also learned a great deal from all of the submitting authors, as well as our exceptionally committed band of reviewers (you know who you are), about the state of play in CL research that is currently conducted throughout the world. We want to communicate what we have learned from this editorial process in both an introductory and a concluding article.

In this introductory article we map the terrain of CL, building on earlier frameworks and recognizing that the terrain is expanding and getting increasingly difficult to readily traverse. The map (see Table 1) is comprised of two axes or dimensions: the 'locus of leadership,' which captures how scholars conceptualize *where* to look for manifestations of leadership and the 'view of collectivity,' which plots *how* scholars conceptualize the collective. Do they see it as a type of leadership or a lens through which to study leadership? We then plot distinctive CL research in four cells, providing definitions and references to empirical work that is emblematic of each cell. In introducing and summarizing each of the five articles we have selected for this Special Issue, we show where each of these is located on the CL map and distil how each provides a clear connection between theory and method in a way that advances our collective understanding of CL.

In the concluding article of this issue (Fairhurst et al., 2020) we move from providing a map of the CL research field that has been conducted to date to a guide that we hope can inspire both experienced and novice travelers to push out the frontiers of exploration of CL. We begin that article by conducting a rapid appraisal of the extant CL research to ascertain what types of CL have proven to be the most popular to research, the extent to which the research has been either purely conceptual or empirical, and what methods have been utilized to a greater or a lesser degree. Drawing on this analysis as well as the mapping exercise presented in the introduction, we look ahead by identifying the three most important challenges that CL researchers must confront and providing three guidelines for addressing these challenges so that the CL research effort can move forward.

## Mapping the territory of collective leadership

Though scholarship has long explored how leadership is practiced, implicitly or explicitly, as a joint endeavor (Burns, 1978; Hollander, 1964; Rost, 1993), the past few decades have seen a burst of scholarship investigating this phenomenon. With the field's shift away from the single, heroic leader towards interest in how leadership emerges from social interaction and takes many forms, attention has moved to exploring the implications of the relational nature of leadership for taking seriously its collective dimensions.

The field has seen important theoretical and empirical developments, but researchers operating under the broad theoretical umbrella of CL continue to work on different paths and with different theoretical frameworks. A proliferation of terms describes the work (e.g., relational, collective, plural, and so on), and while nomenclature may appear interchangeable, meanings differ significantly (Uhl-Bien and Ospina, 2012; Yammarino et al., 2012).

However, the term 'collective' is elastic enough to cover the broadest possible approach according to its generic definition: 'involving all members of a group *as distinct from its individuals*'.<sup>2</sup> The territory includes constructs that range from 'shared' (Pearce and Conger, 2003) and 'distributed' (Gronn, 2002), where leadership is still embodied in relationships and roles, to 'processual' (Hosking, 1988) or 'discursive' (Fairhurst, 2007), which may imply a more disembodied<sup>3</sup> systemic approach. These approaches also use a wide range of possible observational units for the empirical investigation of leadership, including individual actors, interactions, relationships, talk, narratives and discourses, events, activities, places, situations, material and symbolic objects, and so on. This diversity, which may also reflect the early stages of development of this emerging landscape, can be viewed as a rich resource and a source of creative innovation in the field. However, some clarity is needed to ensure dialogue and cross-pollination within the CL umbrella, across leadership studies, and across the organization and management fields.

Scholars in various disciplines and with various perspectives have offered helpful maps (Alexy and Hazy, 2018; Denis et al., 2012; Endres and Weibler, 2017; Ospina and Uhl-Bien, 2012; Yammarino et al., 2012) that intend to sort out the assumptions and dimensions of CL.<sup>4</sup> However, we suggest that a conceptual picture of the territory still lacks the required clarity. We offer a map that, building on prior efforts, invites some basic agreements on the criteria that can help trace the conceptual boundaries around

existing scholarship. This is urgently needed so that CL scholars can position others' and their own practices of research and theory development.

Our theoretical map includes research for which the researcher has claimed an intention to explore the collective nature of leadership.<sup>5</sup> The first analytical dimension is the 'locus of leadership' or where leadership is seen as located or situated. This is where the researcher looks for leadership in the immediacy of the group or in the system. The second is a foundational attitude towards the nature of human beings, their interactions and context, which results in fundamentally different understandings of what 'collectivity' is. These dimensions are associated with how scholars who are committed to move beyond a leader-centered approach view the reality of leadership as a social phenomenon that can be theorized and studied.

We first elaborate these dimensions and briefly compare them to earlier maps. We then dig deeper into our map by unpacking how the two dimensions combine with one another in a four-cell matrix.

### *Dimension 1: Locus of leadership*

This dimension refers to where we look for leadership. Others have called this the 'epi-center' (Hiller et al., 2006) or the point of leadership manifestation (Endres and Weibler, 2017). A helpful way to think about this dimension is to realize that attention to locus represents the answer to the theoretical question, *where or what is the source of leadership?* (Drath, 2003), that is, where does leadership emerge and manifest itself empirically? Much like prior maps, we classify studies considering two possible categories: groups (including dyads) or system.<sup>6</sup>

*Does leadership reside in the group?* Here, the researcher views leadership as residing in the interpersonal relationships among members of a group. This category includes researchers who consider that the locus of leadership is the interpersonal realm between two actors, usually leaders and followers, or co-leaders. It also includes views of leadership as residing in (or emerging from) complex interpersonal relationships taking place in a relatively bounded social context, be it a team, an organizational unit, an organization, or a larger social group.

Examples of research taking this view include: studying how leadership emerges and is shared in teams (Carson et al., 2007) and exploring the quotidian, dialogical practices of leaders in a public agency (Cunliffe and Eriksen, 2011). Leadership is decentered from individuals and shifts to relations (Crevani and Endrissat, 2016), but it is still humanly embodied, that is, it is easy to identify the sources of leadership within distinct relationships and patterns of interaction among concrete social actors.

*Does leadership reside in the system?* Here, the researcher views leadership as residing in complex configurations of the broader system of relationships bounded by teams, organizations, communities, societies, and so on. The persons in relationship are not the sources of leadership, but leadership is a property of the system itself, theoretically decoupled from the relationships that produce it. Leadership as residing in the system manifests in various ways. For example, Smircich and Morgan see leadership as

‘enact[ing] a system of shared meaning that provides the basis for organizational action’ (Smircich and Morgan, 1982: 258). Spillane et al. (2004), scholars of education, conceptualize leadership as ‘a distributed practice, *stretched over* the social and situational contexts of the school’ (emphasis added; Spillane et al., 2004: 5). Here it is harder to associate leadership with specific individuals or their interactions, and it may appear as disembodied (cf. Holm and Fairhurst, 2018); in fact, in some cases, the association may be with non-human actors instead.

Examples of research taking this view include studying the distribution of leadership roles at different organizational levels (Gronn, 2009), or investigating language, discourses, and texts (figurative and concrete) in specific organizational contexts (like meetings) to understand the emergence of shared-hierarchical leadership configurations over time (Holm and Fairhurst, 2018).

A comparison of dimension 1 of our map with recent maps in the literature shows that it resonates with some but not with other maps. Our ‘locus of leadership’ is very similar to the theoretical distinction between the interpersonal interactional realm and the social system or collective realm proposed in dimensions like ‘sources of leadership’ (Alexy and Hazy, 2018) and ‘emerging flows of influence’ (Endres and Weibler, 2017). In contrast, dimensions distinguishing between a single individual in relationship (in dyads or groups) and multiple individuals (in networks of relationships) (Denis et al., 2012; Yammarino et al., 2012) resonate less because of their focus on methodological levels of analysis. Though this dimension may suggest (by implication) where leadership resides, the theoretical question is not explicitly posed.

The difference between these two approaches points to the potential problem of conflating theoretical and methodological operations when doing empirical research. In turn, this is linked to a danger in CL empirical studies of creating an incongruous theory–method link by using inappropriate methods for studying it (Fairhurst and Antonakis, 2012). Our conceptualization of this first dimension addresses this problem in our proposed map and helps to illuminate the reason for this confusion. As demonstrated in the resonant maps, our ‘locus of leadership’ highlights a theory-driven operation intended to bound and find the (situated) manifestation of leadership in the world. This is eventually linked to producing better methodological decisions about levels of analysis, but though related, the nature of each operation is quite different. Our map contributes to clarify this in ways that help avoid theory–method incongruence.

### *Dimension 2: View of ‘collectivity’*

The second analytical dimension further differentiates among studies with a similar locus of leadership. View of collectivity denotes a very important distinction. When leadership scholars and practitioners use CL to name an empirical reality, we call this CL as ‘type.’ When they use it to apply a theoretical lens on that reality, we call this CL as ‘lens.’ Thinking of CL as type or lens changes significantly how researchers approach their study. In contrast to the choice between group and system as the locus of leadership, a choice between type and lens implicates the researcher in considerations about the nature of leadership (ontology) and thus of how we can access it in the world (epistemology).

*Is CL a type of leadership?* For a researcher who views CL as a type, ‘collective’ conveys an empirical reality that can be differentiated from other kinds of leadership in the world. It directs the analyst’s attention to plural forms of leadership, such as two leaders co-leading an arts organization, leadership in self-managed teams, or various leaders sharing leadership roles. Notice that this differs from *the locus of leadership* (group or system) because researchers who view CL as type may vary in their views of where leadership resides.

Interested in leadership practice, these scholars ask whether and how the nature of leadership changes when it emerges in plural forms. They explore how these new forms manifest themselves differently, and whether they have their own properties and practices, compared to manifestations in traditional unitary forms. They see that solo and plural forms coexist and that they may complement each other. Examples of research where CL is viewed as a type include a study about the quality of the relationship among co-leaders (Reid and Karambayya, 2009) and a study using network analysis to identify leadership patterns in an organization (White et al., 2016).

*Is CL a lens to study leadership?* From this perspective, a CL lens is an indispensable theoretical device that can be applied to understand both unitary and plural forms of leadership. Rather than viewing CL as one type of leadership among many, it is proposed as an entirely different way of understanding leadership. Applying a new lens produces a fundamental shift in how leadership is viewed and studied, and it challenges core assumptions of dominant theories.

Researchers who take a collective lens draw on constructs from contemporary social theory to frame leadership research problems and questions, including symbolic interactionism (De Rue et al., 2010), various constructionist approaches (Barge, 2012; Fairhurst and Grant, 2010; Hosking, 2011), practice theory (Raelin, 2017), critical theory (Alvesson and Spicer, 2012; Collinson, 2014), some versions of complexity theory (Uhl-Bien and Arena, 2018), and post-structural and postmodern theory (Fairhurst, 2007; Ford, 2010), among others.

Drawing from specific social theories, scholars produce studies that differ from each other in important ways (e.g., attention to issues of materiality), but they are all grounded in a shared point of departure: proposing a different meaning of relationality as a holistic view that ‘draws us to consider issues of process, context and relational interacts, in ways that have been overlooked in the cognitive and behavioral approaches that have predominated in leadership theory’ (Uhl-Bien and Ospina, 2012: 575). They propose different ontologies of leadership, with epistemological implications for the study, which motivate certain commitments in its research orientation.

*Ontological commitments.* The underlying (and usually implicit) ontology of entity leadership theories gives primacy to individual actors and to leaders as agents (Bolden, 2011: 262). Using a collective lens draws attention to other understandings of the nature of leadership (Drath et al., 2008). As an example, studies that draw on a process ontology of leadership issue a fundamental challenge to the building blocks of classical leader-centered theories by beginning with a relational claim that process and not entities best represent what exists in the world, including human experience (Crevani et al., 2010; Fairhurst, 2016; Simpson, 2016; Wood, 2005). This would mean that ‘leadership is found

neither in one person or another, nor can it be simply located between several people . . . [L]eadership is already a ‘complete’ relation, where *the relation is the thing itself* and each part necessarily refers to another, but without ‘completion’ in a straightforward way’ (Wood, 2005: 1105).

*Epistemological commitments.* Starting from the unfolding process by which ongoing joint accomplishments take place, the researcher must consider how this emergent reality can be known, and how it can be accessed in the world without reducing the focus to an entity (person, practice, interaction) (Crevani et al., 2010). It is within the flow of relational dynamics that social meaning is co-created and thus the world understood for what it is.<sup>7</sup>

Another way of thinking about this is by considering two contrasting understandings of ‘the self.’ Social actors are either self-contained autonomous individuals, or they exist only in relation to one another (even if they usually experience the self as a relatively stable set of understandings). Hence, understandings of ‘the self’ may be individuated and autonomous or connected and co-constructed (Fletcher, 2004; Gergen, 2009; Hosking, 2011). This aligns, in turn, with two contrasting views of how social actors engage in relationships, interactions, and actions in practice.

For example, the critical notion of ‘roles’ (i.e., comprehensive patterns of behavior that others recognize and expect), so important for leadership studies, takes a different meaning in each view. Roles can be understood as fixed, that is, as rules and expectations that are defined prior to engagement; roles are also boundaries that define relatively stable patterns of social action. In this case, studies tend to focus on the behaviors of social actors as expected prior to the relationship (i.e., internal to the role). However, contemporary constructionist social theories place actors in a more dynamic social reality, where roles are emergent and flexible rather than fixed. That is, roles have tentative and porous boundaries; they are continuously negotiated and co-produced, as social actors interact.

Researchers who view CL as lens draw on written and spoken language: texts, narratives, stories, and discourses (involving both language-in-use and broader socio-historical systems of thought); communicative gestures, non-discursive actions, interaction processes; material objects (e.g., bodies, spaces, places, technologies, and other organizational artifacts); and organizational events, practices, and processes, for example. Examples of such research include, at the interpersonal (group) level, capturing conversations to identify a shift in direction that manifests a leadership moment (Carroll and Simpson, 2012), and at the system level, a study of the relational practices underlying leadership configurations emerging in a newly formed leadership space (Chreim, 2015).

Comparing dimension 2 of our map with recent maps in the literature shows that ‘view of collectivity’ represents a significant contribution of the map. Nevertheless, we acknowledge a theoretical connection with some of the other frameworks regarding ontological and epistemological foundations. For example, both Endres and Weibler’s (2017) ‘view of leadership reality’ and Alexy and Hazy’s (2018) ‘mode of inquiry’ distinguish entity (objectivist or subjectivist) and social constructionist (intersubjectivist) approaches, much like we do. But relying on philosophical foundations in the abstract may bewilder rather than give clarity to scholars interested in understanding the contours of the CL territory.



Our view of collectivity thus offers two additional advantages. First, it names the specific phenomenon of collectivity, which is at the heart of CL research. Though based on broader philosophical grounds, it applies principles of ontology and epistemology very specifically to what it means for a phenomenon to be conjoint as opposed to singular.

Second, understanding collectivity as type versus lens is more parsimonious than the prior alternatives. In fact, the complexity of previous approaches may backfire. Researchers starting with very sophisticated understandings of constructed reality may revert to language (and methods) that are incompatible with such understandings. For example, Denis et al. say that their fourth category, producing leadership through interactions, is a very different animal than the first three: ‘It is because leadership is conceived as elaborated through social processes and emerging via interactions that it is *fundamentally* plural’ in contrast with their other three clusters (Denis et al., 2012: 255, emphasis added). This suggests the authors are invoking a lens approach to CL. At the same time, however, they suggest that ‘propitious contexts’ for their category include knowledge-based organizations (Denis et al., 2012: 215). Suddenly, we are back to CL as one type of leadership among many.

## Mapping collective leadership research studies

Our scheme has internal theoretical consistency across dimensions. This is because both dimensions chosen to create the matrix address two equivalent kinds of theoretical decisions researchers must make (explicitly or by default) to develop a sound research orientation for the study. They must clarify, first, where to look for leadership, and second, what they mean by ‘collectivity’ (when focusing on the collective dimensions of leadership). Proposing equivalent analytical dimensions for comparison and categorization increases the analytical clarity and leverage to locate studies in each cell. Plotting each of the two dimensions on a separate axis creates four cells, or categories of similar streams of research, as shown in Table 1.

Each cell of Table 1 includes leadership research streams under the CL theoretical umbrella, recognized as new leadership theories. Appendix 1 offers definitions and selected references to empirical work of emblematic scholars for each mentioned research stream.

### *Cells 1 and 2: CL as type (plural forms of leadership)*

Research in these cells focuses on plural forms of leadership that differ considerably from the traditional form manifested in a unitary leader authorized to lead followers. The two cells vary according to the locus of leadership.

*Cell 1: Research that understands ‘collectivity’ as focusing on plural forms of leadership and where leadership resides in interpersonal relationships (i.e., dyads and groups).* Studies in the following leadership traditions tend to fit well in this cell: dual leadership (or co-leadership), shared leadership, social network leadership (when the focus is on dyads),<sup>8</sup> and team leadership (see Appendix 1 for descriptions).

Consider, for example, Reid and Karambayya's (2016) study of eight cases of dual leadership, which involved a pair of administrative and creative leaders sharing the executive direction in cultural nonprofit organizations. Viewing leadership as 'a dynamic, reciprocal process involving multiple parties and collective outcomes' (Reid and Karambayya, 2016: 611), the researchers focus on the interpersonal relational dynamics within the dual leadership form, and they draw attention to broader organizational processes shaping it.<sup>9</sup> Findings suggest that the organization members' memory of the relationships of prior leaders influences the emergence and development of reciprocal trust in the newly formed relationship, once a new leader replaces one member of the dyad. In other words, this research shows the importance of prior organizational history on the quality of the dual relationship.

In a different vein, Chrobot-Mason et al. (2016) offer an example of a network analysis exploring dyadic relationships embedded in broader informal relational networks. They study teams in an R&D division of a pharmaceutical company, considered as a pluralized leadership context, to explore whether and how individuals participate in leadership relationships. They find that employees who strongly identify with their company and team are more likely to view others as a source of leadership and are also more likely to be viewed by others as a source of leadership.

*Cell 2: Research that understands 'collectivity' as plural forms of leadership and where leadership resides in systemic dynamics.* Studies here share the same view of collectivity as those in Cell 1, but they expand the scope of where leadership resides. Studies in the following theoretical traditions tend to fit this cell: multiteam systems leadership; distributed leadership (both in hierarchical and network contexts); network leadership (beyond dyads); leadership practices in complex environments (labeled 'collective' and/or 'collectivistic' leadership, e.g., Yammarino et al., 2012); and complexity leadership (note that some studies in the last tradition may also frame CL as a lens, in Cell 4, a point further elaborated below).

Organizational behavior and management studies offer robust examples of empirical research interested in the leadership practice of formal leaders by expanding the locus of leadership to the system level. Network approaches are also a common example of work in this cell. Leaders are viewed as embedded in networks of relationships and participating in volatile environments: 'In complex environments subject to rapid change, multiple leaders operating in a collective fashion and with team and network-based approaches are critical to unit and organizational performance' (Yammarino et al., 2012: 394). Others focus on social networks as they become manifest within the context of governance networks, that is, networks of organizations that decide to collaborate toward addressing a common goal. White et al. (2016) studied a public service interorganizational network to explore how the micro-level enactment of pluralized leadership was shaped by local interactions derived from social relations. They found that differences in patterns of pluralized leadership (shaped through actors' leadership and informal networks) help explain who is viewed as leader in the network. Those who receive support tend to nominate the supporter as having leadership influence, whereas leadership influence and informal ties are more likely to be aligned, and hence mutually entrained.

Some complexity leadership studies fit this cell. Though some suggest that complexity theory uses a constructionist lens (Cell 4), the scant empirical work published suggests a fit with CL as type (Cell 2). For example, Marion et al. (2016) identify ‘collective’ to mean ‘leadership in collectivistic systems’, positioning them in the category of CL as type. They study three agent networks in an elementary school conceptualized as a dynamically changing organization. Qualitative interviews, network analysis, and response surface methods suggest that informal leadership and engagement in cliques positively affect the productive capacity of the studied organizations. Cliques also absorbed large amounts of information flow (volatility) through information-processing adaptability (a collective-level property) thus promoting stable productivity levels.

### *Cells 3 and 4: CL as lens (a theoretical lens applied to leadership research)*

Interpretivist, constructionist studies may be grounded in different social theories such as relational constructionism (Hosking, 2011), pragmatism (Simpson, 2016), communication approaches like the communicative constitution of organizations (CCO) (Fairhurst and Connaughton, 2014), or practice theory (Raelin, 2017), among others. Likewise, while interpretivist studies have gained currency in the field, studies rooted in other constructionist approaches have also contributed to challenge traditional assumptions of classical leadership theory. For example, poststructuralist and postmodern theories deconstruct the assumption that people are whole and coherent subjects with bounded identities and a unified sense of who they are, highlighting the role of identity work in leadership (Fairhurst, 2007; Ford, 2018). Despite these differences, studies in Cells 3 and 4 share a similar research orientation whether they view leadership as residing in the group or in the system.

*Cell 3: Research that understands ‘collectivity’ as an alternative theoretical lens and where leadership resides in interpersonal relations (in dyads and groups).* As with Cell 1, this research views leadership as residing in interpersonal relationships. However, unlike those in Cells 1 and 2, it proposes an alternative theoretical approach to studying leadership. Studies in the theoretical traditions of relational leadership (Fletcher, 2004; Uhl-Bien, 2006) and those drawing from practice theory (including leadership-as-practice) fit in this category. Overall, the work focuses on identifying and understanding the consequences of actual conversations and other relational processes.

Some scholars explore how processes, practices, and interactions contribute to co-produce ‘influential acts of organizing’ or shifts in direction (Crevani et al., 2010: 82; Hosking, 1988: 147). For example, Crevani studied departmental units in two Swedish organizations (Crevani, 2018; Crevani et al., 2010), with interviews, meeting conversations, and field observations as data sources. She focused on processual and relational dynamics at the interpersonal level, giving equal weight to people in different positions. She also documented how interactions that produced the content of the conversations contributed to shift direction in the collective work, thus influencing social order.

This example also illustrates that studies in Cell 3 tend to highlight leadership’s emergent nature, with some scholars arguing that leadership may emerge without actors’

specific intention to make it happen (Crevani, 2018). Therefore, a focus on micro-level conversations (Carroll and Simpson, 2012) and on mundane daily operations (Sergi, 2016), including leadership-as-practice, (Raelin, 2017), represents another important realm to study the emergence of leadership decoupled from the leader. Cunliffe and Eriksen explore leadership as 'embedded in the everyday relationally-responsive dialogical practices of leaders' (Cunliffe and Eriksen, 2011: 1425) and investigate its nature through ethnographic and interview research on leaders in a US Federal Security agency. They find that the practice of relational leadership 'is a way of being-in-the-world; encompasses working out, dialogically, what is meaningful with others; means recognizing that working through differences is inherently a moral responsibility; and involves practical wisdom' (Cunliffe and Eriksen, 2011: 1433).

*Cell 4: Research that understands 'collectivity' as an alternative theoretical lens and where leadership resides in systemic dynamics.* As with Cell 3, this research proposes alternative lenses to study leadership; however, here leadership resides in systemic dynamics, in addition to interactions within groups of interest, as those in Cell 2. Most studies in the following theoretical traditions tend to fit this cell: collective constructionist leadership, discursive and communicative leadership, and some streams of critical leadership.

Drawing from a relational and practice approach similar to that in Cell 3, some research intentionally shifts from a focus on interpersonal group relations to explore leadership practice as a unique type of 'work' at the organizational level. For example, in their multi-method, multi-cohort study of 60 social change organizations, Ospina et al. (2012) identified intentional practices (i.e., leadership work) that were oriented toward reframing discourse, bridging difference, and unleashing human energies. These practices produced the collective capacity that helped the organization leverage power to produce systemic social change (Foldy et al., 2008; Ospina and Foldy, 2010; Ospina et al., 2012).

Other scholars remain interested in the dyadic interactions of individuals (written and verbal) (like those in Cell 3), but shift to the systems level to ask how these contribute to construct broader social arrangements (Courtright et al., 1989; Fairhurst, 2007; Fairhurst et al., 1995). They also explore how leadership emerges as it is constructed in organizational contexts (Fairhurst and Grant, 2010; Tourish and Barge, 2010). Likewise, some scholars combine constructionist, discursive and critical theory, exposing 'the situated power relations and identity dynamics through which leadership discursive practices are socially constructed, frequently rationalized, sometimes resisted, and occasionally transformed' (Collinson, 2014: 37; Gordon, 2010; Tourish, 2014). And yet others apply a critical lens to interrogate the reality of leadership itself, surfacing its social functions in (re)producing systems vis-a-vis discourse and ideology (Alvesson and Spicer, 2012; Alvesson and Sveningsson, 2003).

### *Working across the cells*

Finally, it is worth mentioning an exemplar of an emergent approach that crosses the boundaries of the perspectives and demonstrates the promise of working more fluidly

across paradigms. Chreim (2015) draws on the idea of configurations that Gronn and other distributed leadership scholars had been exploring (Cell 2), but takes a different direction with it, when working theoretically and empirically in the realm of practice theory (Cell 3). Studying acquisitions in organizations, she uses documents and interviews with stakeholders involved in the integration efforts (e.g., CEO, senior managers, senior staff, middle- and lower-level managers) to explore the leadership configurations that emerge when different interactants enter the leadership space, as well as the practices that result in these configurations (Cell 4). She was thus able to attend to frames and discourses, activities, and participant relationships. Consequently, she develops insights from simultaneously viewing leadership as type and as lens, and from shifting attention to possible locations or sources of leadership in interactions and in systemic patterns. Clearly, to be successful in such an ambidextrous approach, scholars must have clarity to understand the theoretical and methodological shifts and the underlying assumptions at every step of the process.

Introducing the theoretical map is not simply an end in itself; its purpose is to help researchers clarify their theoretical positioning and thereby more effectively connect theory to method. We also see the map as an ideal way to showcase the articles featured in this Special Issue and where they fit theoretically.

## **The Special Issue articles**

### *Where they fit and how they connect theory and method*

We end our introductory article by presenting and describing the articles we selected to be published in this Special Issue. We explain how they each fit into the map and how they contribute to advance our thinking about connecting theory and method. The articles are quite different from one another. They are located in different cells and study quite different contexts. Four of the articles are empirical, and one would best be described as a methods article. Nevertheless, they share a commitment to exploring and demonstrating the importance and benefits of ensuring a good theory–method link when conducting CL research.

The first article to be featured in this Special Issue is written by Émilie Gibeau, Ann Langley, Jean-Louis Denis, and Nicholas van Schendel. It is entitled, ‘Bridging competing demands through co-leadership? Potential and limitations,’ and focuses on co-leadership (or dual leadership) in four healthcare organizations marked by competing professional and managerial institutional logics. In describing CL configurations, they revealed a rich diversity in how 20 dyads (across different organizational levels) tried to bridge competing logics. The study can be located in Cell 1; in terms of the first dimension of our map, this study locates CL in the group category but focuses on dyads. For the second dimension, CL is a type involving the collective pooling of leadership expertise (see also Denis et al., 2012). However, by also establishing a theory–method link between the study of institutional logics through organizational discourse, they move toward Cell 2 considering the organizational level. Their methods were also longitudinal and multiple. We selected this article for the Special Issue because it was revelatory of an under-examined CL paradox: CL is most needed when it is the most difficult to

achieve. In this study, certain configurations of physicians and managers could find ways to peacefully coexist, but they often could not bridge the competing logics that were their *raison d'être*. This study reveals the ways that professional–managerial tensions at the organizational level reverberate at the dyadic level to expose the operations of power and paradox in CL.

The second featured article, 'Investigating the interplay between formal and informal leaders in a shared leadership configuration: A multimodal conversation analytical study,' is written by Dorien Van De Mieroop, Jonathan Clifton, and Avril Verhelst. In this applied linguistics study, the authors examine how formal and informal leadership social practices are played out within a specific workplace context of a presentation round at the beginning of a meeting. This study fits squarely within Cell 3 of our map of CL approaches with its focus on leadership residing within a group through a CL lens. They use multimodal conversation analysis to analyze video-recordings of naturally occurring workplace interaction. Through their analysis, they show how the 'doing' of leadership is not just confined to the formal leader. Rather, they note that through a variety of communicative media such as talk, gaze, the use of space and artefacts, leadership is negotiated in subtle ways that allow informal leadership to emerge in conjunction, and sometimes in conflict, with formal leadership. We appreciated the meticulous way in which the study was conducted, its focus on the interface between hierarchical and shared leadership, and the multimodal emphasis on the materialities of the body, technology, and space. We believe these dimensions will help mine fresh empirical insights into CL.

In the third article, 'Paradigm warriors: Advancing a radical ecosystems view of CL from an Indigenous Māori perspective,' written by Chellie Spiller, Rachel Wolfgramm, Ella Henry, and Robert Pouwhare, the authors advance a truly unorthodox and mind-expanding way of thinking about CL. CL scholars have traditionally seen themselves as the carriers of frame-breaking understandings, but this article showcases how far we still have to go. The authors describe a revolutionary Māori ecosystems view of leadership, which encompasses the contributions of the entire ecological community—ancestors, animals, rivers, and trees. Moreover, they put forth a particular approach to creating knowledge, which is aligned with this alternate worldview. Called 'wananga,' this worldview 'traverses time and space and involves a quality of consciousness that brings forth an integrated collective intelligence.' The authors illustrate theory and method with three leadership moments that exemplify the notion of ecosystems leadership. This ecosystem is bound together in several ways: activating the knowledge code, cultivating ties of affection, and working the tensions. The article resides in Cell 4; it sees leadership as located in a system, rather than a group or dyad, but defines system as far beyond a particular organization, network, or social system. It uses a CL as lens approach, but here the lens applies not just to the human environment but also to the entire physical world that we inhabit.

The fourth article, 'Moments that connect: Turning points and the becoming of leadership,' is authored by Chrysavgi Sklaveniti. The author investigates how leadership relationships are co-constructed in situ and over time, using a processual orientation to study leadership relationships. The value of this approach is successfully demonstrated by describing the theoretically-driven methodological choices the author made when addressing the challenges of implementing the research. The study focuses on unfolding flows of conversations among participants during recurrent meetings in a UK third-sector

organization. Sklaveniti finds that leadership is co-constructed when ‘matters of concern become matters of collective engagement’ through discernible moments that connect individuals to the collective; organized as trajectories, these illuminate how the group finds direction. Using constructs from relational leadership theory, Sklaveniti devises a creative research methodology that, in the author’s words, makes visible the momentary expression of leadership relations, thus developing a way of ‘seeing the collective in co-action.’ The article is located in Cell 3 of the map; the focus on micro-level interactions reflects Sklaveniti’s view of leadership as residing in the group. The congruent application of constructionist assumptions also suggests a *CL as lens* approach.

The final article, ‘A tale of three approaches: Leveraging organizational discourse analysis, relational event modeling, and dynamic network analysis for collective leadership,’ is co-authored by Cynthia Maupin, Maureen McCusker, Andrew Slaughter, and Gregory Ruark. This article stands out in the Special Issue in two main ways. First, though all five articles explore methods in some depth, this one does not include any empirical material. It is what is often referred to as a methods article, although it also deeply connects method to theory. The article explores three different methods that, to our knowledge, have not been brought together previously: organizational discourse analysis, relational event modeling, and dynamic network analysis. The authors do a nice job of comparing and contrasting the three approaches, showing the strengths of each. The second point of difference is that this article mostly explores quantitative methods, although it does include a few qualitative methods too. We wanted to make clear that CL research is largely methodologically agnostic; it can be fruitfully explored through a host of methods, as long as they are robustly aligned with theory. The authors demonstrate what is gained through parsimonious quantitative data as well as rich qualitative data. Given the breadth of the methods explored, the article suggests techniques that fit into all four cells of our map. The suggested methods can be utilized to study dyads, groups, and systems, and they work for researchers with both type and lens worldviews.

## Conclusion

It is our pleasure to showcase these five articles as exemplars of the best work that is currently being undertaken to seriously grapple with the interrelation of theoretical understanding and methodological practice. In addition, these articles grow our macro- and micro-understandings of the phenomenon of CL itself, by expanding it beyond human interactions to consider entire ecosystems, by parsing the small communicative units from which CL emerges, and by considering the fundamental configurations that bring embodied CL to life.

In the article that closes the Special Issue (Fairhurst et al., 2020), we delve into the three most pressing methodological challenges that we believe are holding up the progress of CL research. We also show how these articles illustrate the various ways these challenges can be recognized and addressed.

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## Notes

- 1 An international network of scholars formed in 2014 around their common interest on collective leadership scholarship.
- 2 Retrieved from Online Merriam-Webster Dictionary, 20 November 2019: <http://www.merriam-webster.com/dictionary/collective>.
- 3 We use the term 'disembodied' with caution, as it could be interpreted as non-materialist, which is not our intention. For example, in discursive leadership, which is a collective approach, its view of discourse is materially mediated.
- 4 For additional maps that review subgroups of studies under the collective leadership umbrella, see Ulhøi and Müller, 2014 (shared); Bolden, 2011 (distributive); Crevani and Endrissat, 2016 (practice theory); Fairhurst and Grant, 2010 (constructionist); and Fairhurst and Connaughton, 2014 (communicative).
- 5 Research attending to a single individual 'leader' positioned in relation to another single individual labeled 'follower' was excluded (unless the authors explicitly signaled a movement beyond a leader-centered approach). Scholars included may refer to leaders and followers, but they highlight the collective dimensions through application of a theoretical lens or by focusing on plural forms of leadership.
- 6 Conceptually, this dichotomized focus is really a continuum from interpersonal relationships between individuals, to those among various individuals in a group context, to the multiple configurations of relationships within a larger system.
- 7 There are many variations of social constructionism and thus many applications to leadership, making the literature 'multifaceted, philosophically complex, and methodologically variant' (Fairhurst and Grant, 2010: 177). The shared premise is that 'leadership is co-constructed, a product of social-historical and collective meaning making, and negotiated on an ongoing basis through a complex interplay among leadership actors' (Fairhurst and Grant, 2010: 172).
- 8 Network Leadership appears in both Cells 1 and 2 because network analysis has been used to explore plural leadership both through dyadic relationships embedded in broader informal relational networks and on multiple networked relationships embedded in a system. However, network leadership in Cell 2 also includes network studies that focus on a particular type of network: governance structures explicitly designed to address a common goal, such as organizational goal directed networks in a policy domain (Nowell et al., 2019).
- 9 The authors claim that they use a collective lens via symbolic interactionism, and this would place them as both using type and lens. However, they are more successful in drawing from the assumptions of collective leadership as type than from the constructionist assumptions of symbolic interactionism, as their analysis tends to be more cognitive than constructionist.



**Appendix I. Leadership theories in the collective leadership landscape.**

Cell	Theory	Description	Examples <sup>a</sup>
1	Dual/co-leadership	Leadership couple as a substitute for the single-handed leader (Gronn, 1999)	Denis et al. (2010); Reid and Karambaya (2016)
	Shared leadership	'A dynamic, interactive influence process among individuals in groups for which the objective is to lead one another to the achievement of group or organizational goals or both.' (Pearce and Conger, 2003: 1)	Carson et al. (2007); Ensley et al. (2006)
	Social network leadership	'Leadership . . . resides in the interactions between people thereby constituting a network of relationships that emerges and shifts over time' (Cullen-Lester and Yammarino, 2016: 173)	Balkundi and Kilduff (2006); Chrobot-Mason et al. (2016)
	Team leadership	'Refers to a team property whereby leadership is distributed among team members rather than focused on a single designated leader' (Carson et al., 2007: 1217)	Day et al. (2006); Ericksen and Dyer (2004)
2	Collective leadership practices	'A complex, multi-level, dynamic process that emerges at the crossroads of a distribution of the leadership role, diverse skills and expertise within the network, and the effective exchange of information among team members in order to capitalize on and coordinate their role behaviors and expertise' (Friedrich et al., 2009: 935)	Friedrich et al. (2016); Yammarino et al. (2010)
	Complexity leadership	'A recognizable pattern of social and relational organizing among autonomous heterogeneous individuals as they form into a system of action' (Hazy and Uhl-Bien, 2015: 80)	Marion et al. (2016); Uhl-Bien and Arena (2017)
	Distributed leadership	'The aggregated leadership of an organization is dispersed among some, many, or maybe all of the members' . . . [and] allows for the possibility that all organization members may be leaders at some stage' (Gronn, 2002: 429)	Fitzgerald et al. (2013); Spillane (2006)
	Multiteam systems leadership	'Two or more teams that interface directly and interdependently in response to environmental contingencies toward the accomplishment of collective goals' (Mathieu et al., 2001: 290).	DeChurch et al. (2011); Murase et al. (2014)
	Network leadership (networks)	'Leadership as an emergent network of relations, which is a shared and distributed phenomenon, encompassing several leaders who may be both formally appointed and emerge more informally' (White et al., 2016: 280)	Currie et al. (2009); White et al. (2014)
3	Practice theory studies (including leadership-as-practice)	'Leadership . . . emerges and unfolds through day-to-day experience . . . the people who are effecting leadership at any given time—do not reside outside of leadership but are very much embedded within it. To find leadership, then, we must look to the practice within which it is occurring.' (Raelin, 2017: 216)	Carroll and Simpson (2012); Sergi (2012)
	Relational leadership	'Leadership as a social influence process through which emergent coordination (e.g., evolving social order) and change (e.g., new approaches, values, attitudes, behaviors, ideologies) are constructed and produced' (Uhl-Bien, 2006: 654)	Fletcher (2004); Morley and Hosking (2003)
4	Collective constructionist leadership	'Leadership . . . exists wherever and whenever one finds a collective exhibiting direction, alignment, and commitment' (Drath et al., 2008: 642)	Foldy et al. (2008); Ospina et al. (2012)
	Discursive/communicative leadership	Discursive leadership lies 'at the intersection of little "d" discourse languaging practices . . . (and) big "D" Discourses that . . . are more enduring socio-historical systems of thought. . . .' (Fairhurst and Connaughton, 2014: 18)	Holm and Fairhurst (2018); Wodak et al. (2011)
	(Some) critical leadership studies	'Critical leadership studies . . . share a concern to critique the power relations and identity constructions through which leadership dynamics are reproduced' (Collinson, 2011: 181). (In this cell we refer to critical studies that surface how traditional leadership constructions reflect collectively constructed discourses and dynamics at the societal level.)	Alvesson and Spicer (2012); Gordon, 2010

Source: Adapted and expanded from Alexy and Hazy (2018).

<sup>a</sup>Includes empirical studies published after 2000.

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