5-31-2019

The Heritage Leadership Process: Exploring Meaning Making and Social Emotional Competencies in Heritage Interpretation and Education for Sustainability

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A Co-Authored Dissertation submitted to
The Graduate School at the University of Missouri-St. Louis
in partial fulfillment of the requirements for the degree
Doctor of Education with an emphasis in Educational Practice

August 2019

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Abstract

This study explores qualities identified as being critical to leadership work in heritage fields as identified by established leaders in heritage work. It also establishes a foundational definition of the term heritage leadership. After reviewing existing data to identify significant questions related to heritage leadership, the research team interviewed leaders in Heritage Interpretation and Education for Sustainability with a specific focus on leadership, meaning making, and social emotional competencies as guiding constructs in heritage leadership. A proposed definition of the term heritage leadership resulted: Altruistic aspirations inspire heritage leaders to foster meaningful connections in order to preserve and protect our shared natural, cultural, and social heritage through the contextual application of meaning making and social emotional competencies. This study further explored heritage leadership as a process that leaders follow stemming from personal aspirations and attributes and moving to the development of skill sets and mindsets in preparation for engagement in meaning making as a desired outcome of heritage leadership activities. The characteristics identified in this heritage leadership process guide recommendations for organizational focus on personal and professional development opportunities for staff and students in the related fields. Generation of meaningful, emotional connections to shared social, cultural, and natural heritage is seen by heritage leaders as critical to engaging citizenry in efforts to understand, preserve, and protect shared heritage. Heritage leaders believe that the forging of these connections is crucial to the future well-being of our communities and societies at large.

Keywords: heritage, heritage leadership, definition, social emotional competencies, meaning making, leadership, soft skills, aspiration, attributes, skill sets, mindsets

Acknowledgments

Lynn Cartmell

I had long wanted to pursue my doctorate, but I wanted it to be meaningful, not necessarily factual. In spite of my better judgement and with overwhelming encouragement from my wonderful husband, I dove in. In hindsight, much of this process has been kismet. I was exactly where I was supposed to be. My acknowledgements go out to all the people who helped me get here. First and foremost, to my husband and son, thank you for always being supportive, for being my touchstones, the places I always come home to, and my light in the dark. To my parents and family, thank you for understanding my drive to do this and helping me manage the rest of my crazy life. To my mentors, Peter and Eric, thank you for helping me find perspective and reminding me that I am capable. To my coworkers and supervisors, thank you for encouraging me and helping me climb this mountain. To my friends, thank you for reminding me there is life beyond research and work. Kimberly, Cassy, Tyson, Teresa, and Jamie, you are my people and I promise I never once forgot any of you. To the faculty team, I will never know how you do what you do but thank you for doing it. To the wonderful heritage leaders who spared timed to participate in this research, you inspire and teach me every day. You give me courage and hope for the future.

Lastly, to my cohort and my team, I have made fast friendships with so many of you and I will not long forget this experience. Thank you for carrying me every step and trusting me to carry you…everybody finished.

Tonia Herndon

I would like to begin by saying that a major contributor to me being in this program is thanks to encouragement and unwavering support of my loving husband Jeffrey Aarnio. Not only did he always make sure I had the ability to stay connected despite the Third World challenges of living in the Philippines during this experience, but he was willing to lug a laptop 500 miles across Spain on foot to ensure I was available for my classes. His emotional support and tenderness around me spending hours typing at the local coffee shop and his ongoing enthusiasm for listening to each new idea when I came home is something for which I will be forever grateful. You are my rock!

I would also like to acknowledge my amazing mom Linda Herndon who has been one of my biggest cheerleaders and encouraged me to always shoot for the moon while also pointing out that I was already a star. Her love, and the love of my grandmother, were an ever-present source of strength during this program.

The Heritage Leadership program itself also had so many amazing people that contributed to my success. I would like to thank the instrumental UMSL mentor team who each shared their unique strengths and perspectives, and always showed up with deep love and commitment to my success. Your passion was evident as well as contagious, thank you for making this journey possible for me.

I also want to thank the rest of my friends and family whose thoughts and prayers have offered a collective energy pool to swim in when I felt fatigued by the process. Your patience for my absence and willingness to be a sounding board for both the bright highs and shadows of this experience allowed this marathon to feel possible. I carry each one of you across the finish line with me.

I am now even more inspired to make a positive difference thanks to the incredible heritage leaders I have had the opportunity to interact with during my involvement in this program. From the amazing full UMSL cohort, to the participants of this study, to the phenomenal group of individuals I have had the pleasure of working with to generate this dissertation, I feel very blessed to have learned from each and every one of you. I have been made a better person through knowing you and look forward to continued friendship and collaboration.

Thomas C Moffatt

First and foremost, I want to thank my spouse, Andi Moffatt for all of her support during this journey. From not telling me I was crazy when I first brought up the possibility of starting an EdD. program, to listening to me rattle on endlessly about coursework and research ideas, to understanding when travel and camping had to get replaced with research and study. You are my friend, sounding board, and overall partner in goofiness. I couldn't have done this without you.

To my mom, JoAnn Moffatt. You were as excited as I was when I was accepted into this program. When we learned that you wouldn't be here to see me finish, you made me promise to stick it out until the end and you continued to cheer me on right up to the day you had to leave us. You passed on your love of learning to me and your support and encouragement carries me on to this day.

To the faculty and staff at UMSL. It's been an honor and a pleasure to work with such a talented and committed team of professors and support staff. Dr. Theresa Coble, Dr. Carl Hoagland, Dr. Phyllis Balcerzak, Dr. Timothy Makabuya, and Dr. Keith Miller along with all the other faculty and staff who supported this program, you have my

thanks, gratitude, and appreciation for all your friendly and caring support. I wouldn't

have gotten through without your words and advice.

To my friends and family, so many of you have been patient and supportive of the

fact that I've fallen off the face of the earth for three years. Your understanding when

I've had to beg out on invites, miss events, or leave early to finish schoolwork has been

greatly appreciated and I'm looking forward to seeing you all again on a regular basis.

To the UMSL Heritage Leadership Cohort, all I can say is "Wow"! Getting to

know all of you over the past three years has been such a treat and I am a better person

for knowing you all. Your skills, abilities, and talents have left me speechless on many

occasions and I am proud to count you as friends and colleagues. You've been there for

me through tough times and have shared your tough times with me. I'm honored to be

amongst you all.

Also, to all the heritage leaders who were willing to take time to chat with us. The

wisdom and experience shared with us was not only helpful to this project, but greatly

contributed to my growth as a heritage leader. The generosity with which our requests for

interviews and time was met was humbling, and I am so grateful for your willingness to

share.

Last, but definitely not least, to my team. We've laughed together, challenged one

another, stressed out together, and pulled together to produce something we can all be

proud of. I am so glad we found ourselves together on this project and can't think of an-

other group of folks I'd rather have had on my team. You Rock!

Katy Mike Smaistrla

Heritage leaders exist within the context of their community (for better or worse!) and as such, I start my acknowledgements with the community that supports me. My sincerest gratitude goes out to the people who've encouraged me, inspired me, and simply put up with me throughout this process, particularly my friends and family as well as the larger network of people working to promote sustainability in St. Louis and beyond. This includes the amazing people working in the field of sustainability I admired from afar and had the unique pleasure of getting to interview in this research. Throughout this process, having the privilege of serving as both staff and student in the UMSL community, I continued to be impressed by the caliber of my fellow staff and faculty, and I truly appreciate those who work to keep things moving smoothly and put students' concerns at the forefront of their work. My admiration extends to my fellow students, particularly the individuals on this team - I have grown to know and love this research team and am honored to have gotten the opportunity to work with these three colleagues who I found to embody so many of the characteristics we sought to study when we set out to figure out what a "heritage leader" was like.

Table of Contents

List of Figures

List of Tables

List of Abbreviations

(HIn)   Heritage Interpretation*

(EfS)   Education for Sustainability

(SECs)   Social and Emotional Competencies

(IUCN)   International Union for Conservation

(ICCROM)   International Center for the Study of the Preservation and Restoration of

Cultural Property

(PP4SD)   Professional Practice for Sustainable Development

(IISD)   International Institute for Sustainable Development

(CASEL)   Collaborative for Academic, Social, and Emotional Learning

(NAI)   National Association for Interpretation

*The abbreviation of Heritage Leadership as HIn has yet to gain wide recognition. We propose it as a part of our work and will use it throughout this paper to align with the abbreviation EfS that has been widely adopted in Education for Sustainability. We support the adoption of an agreed upon abbreviation for Heritage Interpretation and invite future discussion of this concept.

Chapter 1: Introduction

History of the program

In 2015, faculty at the University of Missouri—St. Louis, led by Dr. Theresa Coble, established the Heritage Leadership Ed.D. program and began recruiting participants. Their goal was to enter into an ambitious, three-year exploration of concepts related to heritage and leadership with a particular emphasis on sustainability, social justice, and participatory culture. Participants were intentionally recruited from a broad scope of academic and other leadership backgrounds including classroom teachers, heritage interpreters, juvenile justice workers, interpretive managers, park administrators, museum educators, and sustainability educators.

Twenty-four professionals embarked on an examination of Heritage Leadership at the University of Missouri—St. Louis. Together, students and faculty explored the challenges facing our shared natural and cultural heritage and the skills, abilities and actions that heritage leaders apply as they strive to share meaning, foster civic engagement, inspire action, generate awareness, and encourage preservation of heritage resources. With this in mind, the cohort has developed a shared understanding of the concept of heritage leadership and on the ways that heritage leadership work can be understood across multiple disciplines. As a subset of this study, we believe that there are distinct connections between the concepts of meaning making and social and emotional competencies (Drath & Palus, 1994; Drath et al., 2008; Kofman, 2018; Nicholson & Kurucz, 2017), and the work of heritage leaders. We find ourselves returning to the questions: What roles do meaning making and SECs play in engaging in heritage leadership process? This led us to wonder if there are identifiable, key factors of the heritage leadership process that are

consistent across the full spectrum of heritage leadership activities? Is heritage leadership

a term that can be generalized across multiple disciplines to describe a type of activity

shared across those disciplines? Are meaning making and social emotional competencies

core concepts that can be generalized across educational activities such as Heritage Inter-

pretation (HIn) and Education for Sustainability (EfS) to describe the work of heritage

leadership as it is related to those professions?

Background of the Problem

What is heritage leadership and what fuels its processes leadership? Is heritage

leadership different from other arenas of leadership? From the inception of this project,

the research team struggled with the fact that a definition of heritage leadership as field of

study was not readily available. Literature searches revealed very little on the subject alt-

hough a few, tantalizing glimpses emerged that we discuss in Chapter 2 such as the

Mayor's Commission Report (2008). However, the research team found no established

or accepted definition of heritage leadership as applied to work in HIn and EfS. The team

recognized this as a significant challenge to their work and determined that establishing a

foundational definition to start discussions leading to a definition would be a desired out-

come of this project. Seeking to establish a definition and establishing one are two dis-

tinctly different things. However, if heritage leadership is to be recognized as a field of

study it is critical that conversations around accepted definitions begin.

Traditional models describe leadership as an activity generating from individuals

in positions of authority who set direction and vision for followers. However, this view of

leadership may be challenged by the work accomplished by leaders who do not occupy

the roles of positional authority traditionally associated with leading. In order to get a

broad sense of how leadership occurs across the work of heritage leaders in HIn and EfS,

it is important to consider traditional models of leadership as well as alternative models

that describe leadership that occurs outside of traditional hierarchical organizations.

Given the diverse and often non-traditional nature of the work pursued by heritage lead-

ers, exploration of these alternative models of leadership may be particularly significant

to this work.

　　　Drath and Palus (1994) describe leadership as a process of meaning making and a

shared direction, alignment, and commitment across all levels of authority within a

group. Their foundational work has inspired a significant body of research related to lead-

ership and meaning making in communities of practice (Wenger, 1999), collaborative

management (Chen, Wu, Yang, & Tsou, 2008; Huxham & Vangen, 2013), leading in

complex arenas (Pulley & Sessa, 2001), and leadership for systemic and social change

(Attwood, Pedler, Pritchard, & Wilkinson, 2003; Sutherland, Land, & Böhm, 2014). The

alignment of this body of work with the goals of systemic or social change espoused by

individuals working in heritage leadership fields naturally fits an examination of heritage

leadership and the application of meaning making and social emotional competencies in

pursuit of heritage leadership goals including the development of an engaged citizenry.

Examination of leadership as a mechanism that can be shared across individuals, groups,

organizations, and other collectives (Drath et al., 2008) yields a promising glimpse into a

framework for describing leadership that may be used in describing and outlining the en-

deavors of heritage leadership and which can be applied across multiple circumstances,

situations, and cultural traditions. Further inquiry into leadership practice should also explore the applicability of meaning making and social emotional competencies and their impact and effectiveness. This research will focus on the application of meaning making and social emotional competencies to produce leadership within the realms of HIn and EfS. Opportunities for future research and the potential to generalize findings outside the scope of this investigation's focus areas, will be discussed in the conclusions and recommendations section of this study.

Statement of the Problem

Disagreement exists within the field of heritage leadership as to definitions of terms widely used within this area of study. One has only to explore terms of significance such as heritage (Winter, 2013) or leadership (Middlehurst, 2008; Nanjundeswaraswamy & Swamy, 2014) to discover that meanings fluctuate greatly depending on the context and culture in which they are used. Identifying the ways in which heritage leaders apply meaning making and SEC's to heritage work across multiple areas of effort is beneficial to fostering understanding across the diverse groups pursuing heritage-based outcomes.

Purpose of the Study

The purpose of this study was to explore concepts related to heritage leadership and the impact of meaning making and SECs on the processes central to effective HIn and EfS, as determined by recognized leaders in those professions. This study also sought to outline a foundational definition of heritage leadership through an exploration of the leadership skills and abilities used by recognized leaders in heritage work.

Research Questions

The research team's approach to this project was an open-ended exploration of emerging ideas related to heritage leadership. Since the term 'heritage leadership' itself has not yet been well defined, seeking such a definition was a part of the project. We determined that an overly narrow approach to establishing research questions might hamper the interpretation of the information gathered. Instead, the team determined to use the broad, unifying question below as a framework to guide the overall work. We used the narrower focusing questions below to guide our deeper analysis of the ideas that emerged from interviews.

Unifying Question

In what ways do meaning making and social emotional competencies, within the fields of HIn and EfS, interact with the process of heritage leadership?

Focusing Questions

1. What is the definition of heritage leadership?

2. Why do heritage leaders pursue work in heritage?

3. What qualities do heritage leaders share?

4. What do heritage leaders identify as essential components of the process of leadership?

5. How do heritage leaders relate to the process of meaning making in their work?

6. How do heritage leaders describe their application of social emotional skills in their work?

Significance of this Study

Within the many groups striving to achieve impacts related to heritage there are actions that reach above the call of daily routine tasks. These efforts elevate heritage occupations to new levels, open pathways to new understanding, and inspire new generations to answer the call of careers in the heritage fields (Winter, 2013). We assert that work of this nature is heritage leadership. It is significant to the future of those in heritage roles to understand the forces that drive the leadership process and how these drivers can be applied to the future needs of the profession. The success of future generations of heritage leaders depends on a strong understanding of factors leading to accomplishments (and failures) of heritage leaders past and present.

While copious amounts of research exist in leadership studies (Zaccaro & Horn, 2003) and heritage studies (Graham, Ashworth, & Tunbridge, 2000; Winter, 2013), there are fewer efforts to define the role of leadership in the realm of heritage (Mayor's Commission, 2008). Additionally, recent paradigm shifts have moved thinking away from traditional views of leadership, based around a leader/follower relationship, to leadership as a process of meaning making (Drath et al., 2011; Nambiar & Chitty, 2012). Heritage Interpretation, whether focused on sustainability, cultural/historical aspects, or facets of the natural world, is frequently associated with acts of meaning making as well (Ham, 2013). Finally, effective leadership is increasingly recognized as stemming from the application of SECs, or 'soft skills', and less on the application of what have traditionally been referred to as 'hard skills' leadership activities (Kofman, 2018). It is timely to explore the intersection between heritage and leadership in context of these evolving schools of thought.

Can meaning making and SECs serve as unifying concepts in the process of effective heritage leadership? Developing an understanding of this relationship and its impact on the heritage leadership process could be foundational to preparing future heritage leadership professionals. This work may also assist in the development of a generalizable understanding of how heritage leadership occurs across all areas of heritage work, not just HIn and EfS.

Assumptions and Limitations

Potential existed for both conscious and unconscious bias on the part of the research team arising from several sources and will be discussed in more detail in Chapter 3. First and foremost, there is an assumption that heritage leadership is a definable field of study. Evidence to support the concept of heritage leadership as a defined field of study may result from this project, however, researchers needed to be cognizant of avoiding the temptation to focus on evidence supporting this basic premise while ignoring evidence to the contrary. Three of the researchers have strong backgrounds in the HIn, and the fourth is strongly affiliated with EfS (EfS). The team needed to remain aware of potential bias originating from their professional experience which could place a stronger emphasis on educational areas related to heritage and could subjugate other areas of study related to heritage work. All four of the members the research team identify as white, North Americans. The cultural bias associated with this background is worth noting as it may have affected potential applications of the findings to other contexts including cultural identities, topics, practices, and more. Finally, the exploratory nature of this study

required the researchers to be open to additional theories and models that may need to be

incorporated into a final description of the process of heritage leadership.

Chapter 2: Literature Review

In Spring 2017, UMSL students identified and interviewed numerous individuals they considered heritage leaders. Many interviewees struggled with the terminology and did not, at first, agree that the term should be applied to them. Some even posed the question as to whether or not heritage leadership was a legitimate description of the type or classification of work in which they participate. This question is not new to researchers in fields of study related to heritage and exploration of the literature related to heritage reveals a lack of agreement on a formal definition of the term heritage (Waterson and Watson, 2013; Winter, 2013). Similarly, the literature reveals a lack of agreement on one, unifying definition of the term leadership (Drath and Palus, 1996; Northouse, 2018). While disagreement abounds on the scope and definitions of the terms heritage and leadership, review of the literature in search of heritage leadership yields yet fewer and wildly divergent applications of the term. However, within these limited references to the term heritage leadership lie tantalizing hints of the potential for this term's applicability to the work of heritage professionals (Castaneda, 2016; Welch, Lepofsky, Caldwell, Combes, & Rust, 2011; Welch & Pinkerton, 2015).

As we will discuss below, there have been attempts at defining heritage leadership and heritage leaders. But the work is in its infancy and further analysis, description, and discussion of the terms, as we intend to pursue in this paper, is called for.

Heritage

Heritage generally refers to those things that are inherited or passed from one generation to the next. It can be both tangible, physical manifestations of the human genius

or intangible, immaterial components of our existence (Lenzerini, 2011). Though it is more commonly associated with cultural objects, heritage includes natural spaces and landscapes, the built environment, language, even myths and traditions. As human beings we assign value and "discriminate between things which are worth inheriting and passing on…A constant process of selection is under way, both conscious and unconscious, as each generation decides which elements of its inheritance to keep and which to throw away" (Tonkin, 2019, p. 1). Heritage is "never inert, people engage with it, re-work it, appropriate it and contest it. It is part of the way identities are created and disputed, whether as individual, group or nation state" (Harvey, 2001, p. 15). In essence, we pre-serve and care for things that define our experiences and the experiences of those who came before us.

Heritage leadership, by comparison, is active participation in the process of caring for our inheritance and, thereby, our identities. This process includes collaboration with the intent to span boundaries and develop and empower culturally competent communi-ties, engage controversy, support relevancy and resiliency, while participating in social and environmental justice. UMSL is not the first to use the term heritage leadership. In fact, the term heritage leadership is not even unique to the heritage/museum world. There have been several uses of the term heritage leadership coming from conservative Chris-tian quarters and the conservative American political movement. For the purpose of this literature review, however, these interpretations of the term are not applicable and might even be perceived as antithetical to the concept discussed here.

As early as February 2008, the term heritage leadership could be found in refer-ence to United Kingdom's Cultural Leadership Programme and the London Mayor's

Commission on African and Asian Heritage. Initial conversations regarding heritage leadership were in reference to the leadership of the heritage field; however, these discussions have a far broader impact.

The concept of heritage has typically been used in reference to cultural aspects of our society. The goal of this research is not to develop a single universal definition of heritage, but rather to explore components of and unifying concepts of leadership in heritage work. For this paper, we embrace the wider concept of heritage proposed by Doudou Diène. Diène states that "heritage is at the heart of culture" (Mayor's Commission, 2008, p. 11) which helps us to define our national identity. In this increasingly globalized world, however, national identities may not be important as they once were. National identities are social constructs and may be contributing to the rise in racial discrimination, bigotry, and xenophobia. Heritage is not simply the remains of our ever-changing world, but "both physical and intangible; material and spiritual. The most profound aspect of heritage is the inner heritage of beliefs, values and emotions that define our humanity by linking the ethical and aesthetic dimensions of culture" (Mayor's Commission, 2008, p. 19). Samuel Jones extends this idea further with his concepts of heritage as the DNA of our identities. Culture, by comparison, represents "a space where we encounter and voice different attitudes, ideas, opinions and outlooks—the place where all our identities meet" (Mayor's Commission, 2008, p. 21) Both are related, but in no way the same.

With these ideas in mind, Temi Odumosu argues that, at its core, heritage leadership is the desire to make a radical shift towards meaningful inclusion with strong vision and clear direction informed by more nuanced concepts of heritage and identity. Heritage,

in her view, encompasses "spirituality, belief systems and methods of cultural empower-

ment and appropriation that are often immeasurable and undocumented" (Mayor's Com-

mission, 2008, p. 53). These things cannot be perceived in a vacuum but necessitate the

engagement of communities which is driven by inclusive, transformative leadership. Her-

itage is not a fixed concept but rather "it is the product of multilayered processes of hu-

man interaction" (Mayor's Commission, 2008, p. 53) which must recognize and be inclu-

sive of non-traditional values of technology and the natural environment. It is through

this merger that heritage and culture tie to our sense of place, identity, and meaning.

The usage of heritage leadership has been further expanded by Norway's World

Heritage Leadership program which aims to integrate nature and culture into the conser-

vation and preservation of World Heritage with attempt to address challenges such as cli-

mate change and human development. Funded as a partnership program of the Interna-

tional Union for Conservation (IUCN) and the International Center for the Study of the

Preservation and Restoration of Cultural Property (ICCROM) in 2015 (Mayor's Commis-

sion, 2008) , they describe heritage leadership among other things as "building interna-

tional networks between nature and culture practitioners and institutions that link practice

on the ground with leadership at international, regional, national and local levels" (Wi-

jesuriya, 2015, p. 1).

Called by many names, heritage leaders emerge from many fields of study, multi-

ple interwoven disciplines, and varied personal passions. They are courageous leaders at

times of momentous change and those who honor the legacy built by those who come be-

fore. They are "catalysts" and change-makers infusing chaos and creativity into organized

and centralized systems (Brafman & Beckstrom, 2006). Heritage leaders are individuals,

groups of individuals, organizations, and groups of organizations all dedicated to making a difference in some sustainable way. They scan the past with one eye on achieving relevance in today's world, and the other eye open to a future of exploring possibilities, generating new applied meanings, and influencing change-making behaviors that lead to awareness and viable social change. Using methods of compelling interpersonal communication, heritage leaders seek to preserve, protect, and educate as they encourage "discovery of personal meaning and the forging of personal connections with things, places, people, and concepts" (Ham, 2016, p. 82). In other words, they express a clear desire to act toward preservation of our shared heritage while also recognizing a wider impact beyond self that results in meaning making that can span generations. This is not to say, however, that practicing "heritage leaders" typically self-identify as heritage leaders. Truly, practitioners may be fully engaged in the process of heritage leadership and be unaware that the work they are doing falls underneath heritage leadership's umbrella.

Leadership

One of the initial challenges of this project is whether or not existing definitions, models, and theories of leadership are even up to the task of describing heritage leadership. Given the broad range of work occurring in heritage related professions, it is worth examining whether or not it is even conceivable to establish a working theory of leadership that encompasses the needs of heritage headers. Heritage leaders engage in work related to preservation of heritage resources, interpretive education related to those resources, cultural competency development for heritage workers, sustainable use of heritage resources, and more (Winter, 2013). For the scope of this work, the researchers chose

to focus on the heritage leadership activities related to work in HIn and EfS. Heritage work may take place in a variety of venues with somewhat different guiding principles or outcomes but, as in other professions, there is always work that moves the standards of the profession forward, tackles new problems, and challenges old assumptions. It is safe to assert that this work, above and beyond the day-to-day routine of the profession, is leadership. (Smircich & Morgan, 1982) Further, leadership work may be led by individuals, groups, teams, organizations, coalitions and a myriad of other combinations of people who align and commit to a direction of effort (Bolden, 2011).

The question arises, then, if a traditional view of leadership is appropriate to this task. In the sections below traditional views of leadership are described and examined to suggest applicability in examining the concepts of meaning making and SECs in the process of heritage leadership. An examination of evolving thought in leadership research may also reveal if alternative lenses for viewing leadership are more applicable to the context of this study.

As discussed in the heritage section of this chapter, the challenge faced is not one of a lack of definitions related to the topic. Instead, the sheer volume of definitions for leadership opens the potential for paralysis from overwhelming quantities of divergent opinions of what a term might mean. Reviewing recently proposed paradigms that shift the focus of leadership theory, as well as reviewing a sampling of traditional leadership definitions, theories, and styles is useful to establish the basic structure and assumptions that inform various ontologies of leadership theory.

Hernandez, Eberly, Avolio, & Johnson (2011) provided a statement that nicely summarizes the source of frustration faced by many pursuing research in the field of leadership studies:

> It is not uncommon for both leadership practitioners and academics to lament the range of definitions that are typically used in the literature to describe leadership. The differences in how leadership has been defined have resulted in disparate approaches to conceptualizing, measuring, investigating, and critiquing leadership. For example, some authors have focused solely on the leader to explain leadership, whereas others have examined leadership from a relational, group, or follower-centered perspective. To add to the differentiation that has emerged in the leadership literature, other authors have focused on examining leader traits versus behaviors, while still others have drawn from the cognition and affect literatures to explicate leadership and its effects. (p. 1165)

Leadership research tends to break out into two distinct areas of emphasis. The first area being an exploration of the 'what' of leadership or work on defining the concept of leadership itself. The second area of emphasis is on the 'how' of leadership or an exploration of the skills used, traits supporting, and actions taken to effect change through leadership.

As noted above, leadership definitions abound but most often attempt to describe what must occur in order to say that leadership has occurred. Examples include:

- "Leadership is a process whereby an individual influences a group of individuals to achieve a common goal" (Northouse, 2004, p. 2);

- "Leadership is the process of persuasion or example by which an individual (or leadership team) induces a group to pursue objectives held by the leader and shared by the leader and... followers" (Gardner, 1990, p. 11);

- "Leadership can be defined as the nature of the influencing process—and its resultant outcomes—that occurs between a leader and followers and

how this influencing process is explained by the leader's dispositional

characteristics and behaviors, follower perceptions and attributions of the

leader" (Antonakis, Cianciolo, & Sternberg; 2004, p. 5);

- "Leadership is a process of social influence in which one person is able to

  enlist the aid and support of others in the accomplishment of some task"

  (Chemers, 1997, p. 1).

For the purpose of this paper, it is not our intent to offer a new definition of what

leadership is but to accept as a central tenet of leadership a definition that leadership is

primarily about getting things done. For this work, an examination of the 'how' of the

leadership process guided the research team's work.

Attempts to define the 'how' of leadership also abound and an examination of the

myriad of theories describing leadership skills and styles could even further stymie the

would-be researcher. Central to these discussions are the questions of whether or not

leadership is an action or a process and whether or not leadership requires the presence of

a defined leader to take place.

 Kurt Lewin's work in the 1930s has been described as foundational to modern

leadership theory (De Hoogh, Greer, & Den Hartog, 2015) inspiring a myriad of attempts

to identify the different ways in which leaders apply their skills to motivate followers.

Lewin et al. (1939) attempted to narrow choices to three styles of leadership: Autocratic,

Democratic, and Laissez-faire. A multitude of other leadership theories spring from this

basis including: Spiritual Leadership, Paternalistic Leadership, Transactional Leadership,

Social Leadership, Situational Leadership, Charismatic Leadership, Transformational

Leadership, and many, many more (Nanjundeswaras & Swamy, 2014). A commonality

of these theories is a focus on the relationship between a single leader, a group of follow-

ers, and a set of goals (Drath et al., 2008). These theories create a narrow lens through

which to view leadership and this rigid adherence to a structure that lays the responsibil-

ity for leadership on an individual who is seen to have been gifted or who has developed

a particular set of skills that makes them particularly able to inspire others to take action

becomes problematic in the face of examples in the realm of heritage work, where leader-

ship does not always present itself in this manner.

A prime example of an ineffective and outmoded leadership style when applied to

heritage professions is that of autocratic leadership. De Hoogh, Greer, and Den Hartog.

(2015) define Autocratic Leadership as being "characterized by the centralization of deci-

sion-making and directive power in a single dominant leader" (p. 687). Autocratic Lead-

ership is one of the styles that automatically comes to mind when we think about leader-

ship in a traditional, highly hierarchical sense which may have a place within some or-

ganizations. Many traditional military structures fall into this model, as do crisis manage-

ment and emergency management efforts, and it is appropriate in some of these settings,

although, even these professions are beginning to question the effectiveness of this style

due to its perceived rigidity. In the midst of an emergency, when rapid response is re-

quired, a defined structure of responsibility can be well suited to managing and respond-

ing in a rapid manner. However, there are examples of times when a more nuanced or

collective response to an emergency situation could have, on hindsight, provided a better

result (Waugh & Streib, 2006).

When applied to the work of heritage leaders, this style of leadership is a less-

than-ideal choice for effective work. For example, imagine the heritage leader who finds

herself engaged in work related to a complicated scientific and social issue, such as climate change. Following a traditional, authoritarian leadership style, she would simply order her "followers" to change their ways to a more climate-friendly set of behaviors and the problem would be solved. While there are likely many working to protect our natural heritage from the impacts of climate change who would be ecstatic over such a simple solution to this problem, it is obvious that this approach is unlikely to succeed in the face of the environmental and social complexities involved.

The latter 20th century provided models of collaborative leadership including theories such as Servant Leadership (Greenleef, 1970). These less traditional views of leadership show promise for application to heritage leadership work; however, they still focus on a linear relationship between leader, follower, and goals, even as the leader's role may not be quite what it was traditionally seen to be. It is interesting to note that while Greenleaf (2002) coined the term Servant Leader and wrote about leaders subjugating their needs to those of their followers in the 1970s, the concept was not new. Chinese philosopher and poet Lao Tzu wrote, "A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves" (Laozi & Mitchell, 1988, p. 19). This writing seems to indicate a belief similar to Greenleaf's Servant Leadership designation. Regardless, both of these ideals imply that the leader is the generator of the vision that is applied by followers in order to achieve a goal. Again, this may be problematic for work related to heritage as it could be interpreted as placing the responsibility for generating the solution on an individual.

One encouraging model, described as Transcendent Leadership (Kofmann, 2018) implies that definitions of leadership and followership are integral to any discussion of

leadership. Kofman describes leadership as the "process by which a person (the leader) elicits the internal commitment of others (the followers) to accomplish a mission in alignment with the group's values" (Kofmann, 2018, p. 8). By comparison, followership is the practice of aligning one's self interests with others in pursuit of a common goal. Kofmann approaches a concept we will discuss below when he discusses the motivations for working and asserts that few people are significantly motivated only by pay and benefits but are far more likely to be motivated by feeling that they are part of accomplishing something significant or by feeling that their work "has meaning." However, Kofmann still relies on a linear model of leader-follower relations that is limiting when applied to the concept of leading in the face of complex issues such as those faced by groups engaged in heritage work.

The examples cited above are intended to call attention to a small sample of the range of traditional leadership theories that have been proposed. Hernandez et al. (2011) attempted to plot these and many more theories of leadership against a spectrum ranging from highly individualistic models to more collaborative models. The spectrum of leadership styles identified by Hernandez and fellow researchers (2011), includes a collection of leadership theories where the locus of leadership activity resides within the group known as followers. However, all of these models still default to a traditional, linear view of leader, follower, and goals. Many collective focused models simply flip the impetus for the leader acting to move the group towards a set of goals onto influence exerted by the followers. The relationship between leader, followers, and goals remains largely unchanged and many of these models still place the responsibility on the leader to create the drive to a final vision or goals.

The complexities of issues related to work in heritage professions are such that, while it might be possible that one individual will bring the ideal solution to the forefront, it is more likely that the ideas, thoughts, and solutions from many individuals will be required to properly address them. More recent work provides examples of movements that reevaluate the view of leadership, instead, as a process occurring between individuals and groups who are committed to aligning their work in a particular direction.

One such model of leadership that may describe social movements of the type frequently associated with heritage work is the theory of "Distributed Leadership" (Bolden, 2011). Bolden discusses distributed leadership as a process by which the mantle of leadership may be shared in a fluid and dynamic manner among multiple members of a work group or team, as situations warrant. He further posits that distributed leadership, although the particular term is not found prevalently in the literature, is a concept found if one searches for aligned terms such as collective leadership, shared leadership, or collaborative leadership. These aligned terms all point to a desire to identify a school of leadership that departs from models that rigidly adhere to the idea of leader - follower - goals. However, distributed leadership models seem to stop short of a full reframing of the concept of leadership by implying that collaborative leadership is simply a matter of members of a group rotating who is wearing the title of leader at any given time.

Bolden (2011) and Pearce (2008) describe examples where the mantle of leadership is shared amongst members of a group as each individual's particular skills are needed to effect change, however, his model still identifies one identifiable leader in action at any given time. Examples can be found of organizations or movements that completely lack a single, identifiable leader at any given time. Instead, these movements

share common characteristics of inspiring the alignment of a group of people toward a

shared goal, desires, culture shift, or set of outcomes. Examples are evident in several

radically divergent, but equally effective, social movements conspicuous in contemporary

U.S. society. Brooks (2018) asserts that movements as seemingly divergent as the Black

Lives Matter, #MeToo, and the Tea Party exemplify this type of leadership. While

spokespeople and recognizable individuals exist within each of these movements, there is

no, single clear leader or smaller group of leaders as was typically unmistakable in the so-

cial change movements of the past. Each has grown out of a shared alignment among a

group of people committed to social or political change. Current social media driven

movements like the Alt-National Parks, or the Yellow-Vest movement may also fall into

this category where there no clearly defined leaders and the overall membership is not

well known. Regardless of one's opinion or personal alignment with any of these move-

ments, or with other movements that share this type of structure, the effectiveness of their

ability to inspire discussion, action, and change in contemporary society cannot be ig-

nored. This concept of diffuse leadership as a process within groups, offers the basis for

exploring the workings of heritage leadership and an exploration of this new vision of

leadership theory comes at a time when such work could be beneficial to those involved

in heritage related activities.

Reframing leadership as a process of meaning making (Drath & Palus, 1994) fur-

nishes a pathway to examining leadership that holds significant promise in the explora-

tion of heritage leadership. As with the movements described by Brooks above, Drath

and Paulus offer a view of leadership not as a traditional leader-follower-goals relation-

ship, but instead as a process of meaning making that occurs within and by groups

aligned towards a purpose. Later work (Drath et al., 2008) builds on this earlier work and suggests an ontology for understanding this type of distributed leadership that emerges from group engaging in a process of creating Direction, Alignment, and Commitment (DAC) to work on a shared vision or toward an agreed upon set of outcomes. They argue that the DAC process is flexible enough to encompass traditional leader-follower-goals models of leadership while also inclusive enough to be applied to circumstances where more diffuse leadership takes place amongst individuals, groups, or coalitions of groups that strive towards accomplishing something. This type of leadership also aligns nicely with the collective impact models (Kania & Kramer, 2011) discussed elsewhere in this section.

The reframing of leadership as a more process-based activity with meaning making as a central concept is emerging elsewhere in current leadership scholarship (Drath & Palus, 1994; Koffman, 2018). Meaning making is a concept particularly familiar to individuals working in both HIn and EfS. Ham (2013, p. 81) describes meaning making as "people think; they make meaning; they remember." This suggests that acts of meaning making lead to positive behaviors such as stewardship which heritage interpreters are striving to foster amongst their audiences. In work from the realm of Heritage Studies, Winter (2013) discusses a need for heritage work to engage in meaning making while also needing to refrain from viewing heritage "as merely the building or artifact itself, rather than an intrinsic, and thus ever present, interplay between social and the material, past and present" (p. 396). In their work to reframe leadership as a process of meaning making as opposed to a traditional view of leadership, Drath & Palus assert that, "leader-

ship in organizations can be seen as more about meaning making than about making deci-

sions and influencing people" (Drath & Palus, 1994, p. 8). The connection between the

definition of meaning making in HIn, the view of heritage work as an act of meaning

making, and the reframing of leadership as a process of meaning making invites explora-

tion into the intersectionality of these fields of study and an examination of whether or

not, within that intersection, lies a key component that provides energy to the process of

heritage leadership.

Meaning Making

Meaning making is the process of how people construct, understand, or make

sense of life events, relationships, and the self (Ignelzi, 2001). There are several ap-

proaches to the definition of meaning making which aim to encapsulate this multifaceted,

complex phenomenon. "Meaning and community are co-constructive. They make each

other" (Drath & Palus, 1994, p. 17). In the literature meaning making appears as a pro-

cess involving how, where, and why meaning appears within the specific areas being ex-

amined. This process shows up in a multitude of ways ranging from internal individual

meaning making, to external co-constructed meaning generated collaboratively amongst

others. Looking at both internal and external factors in this process, research also sug-

gests that there exists both global and situational levels to meaning making.

Table 1: Meaning Making and Leadership Concept Synopsis

Concepts	Sub Concept	Description	Citation
Interdisciplinary use of meaning making	Cognitive development and acculturation	Meaning making is developed through acculturation and across multiple disciplines.	Mattingly, Lutkehaus & Throop, 2008
Levels of meaning	Meaning used in coping and stress	The meaning-making process has two main levels, situational and global.	Park & Folkman, 1997
Meaning making in spirituality	Constructing meaning in times of adversity	The meaning making process can be used to both create and face one's reality	Mattis, 2002
Meaning making in museums	Constructivist approach to learning Meaningful communication	The meaning making process that includes a constructivist approach goes beyond expert only constructed meaning and invites co-constructed meaning to occur with visitors.	Sitzia, 2018
The effect of culture on meaning making	Constructing personal meaning through language and interaction	Meaning making develops out of people's encounters with the world and the culture and environment to which they are exposed.	Bruner, 1990
Interpersonal meaning making	Comparing Vygotsky and Piaget's approaches in education	Meaning making can take place between peers of equal understanding or between those displaying a discrepancy in skill.	Fawcett & Garton, 2005
Meaning making and leadership construction	The meaning-making process co-creates what is important	Meaning making may generate leadership verses the older concept of leadership creating meaning.	Drath & Palus, 1994

Global meaning includes the general views that an individual holds to orient themselves in the various situations they may encounter in life. By comparison, situational meaning includes the interaction between this global orientation and what is developed during interpersonal encounters with others (Park & Folkman, 1997). Each aspect of

these two levels is important since they mutually help to shape the narratives of our iden-

tity and how we connect with others around us and the world at large (Singer, 2004). The

structure of this process involves the acquisition of meaning though an individual closing

the gap between their current place of understanding and some newly acquired under-

standing or learning (Park, 2013). This technique can be used in everything from early

childhood development practices to those coping with the difficulties of life. Mattis

(2002) referred to the making of meaning "as forces that encouraged confrontations with

reality and that provided the psychological resources needed to accept reality" (p. 311).

Meaning making is also used as an educational approach in environments of both

formal and informal learning to encourage learners to obtain new levels of understanding

which include how these individuals interpret situations, environments, and objects as it

relates to their previous knowledge, understanding, and experience (Zittoun & Brink-

mann, 2012). This process of meaning making involves a co-constructed approach

whereby experiences are shared during social interaction. This is of interest in that the

use of HIn and EfS both rely on the ability of heritage leaders to encourage the develop-

ment of deeper relevancy in their audiences through personal meaning in order to pro-

mote action or shift behavior. For example, Ham (2013, p. 3) shares that HIn is some-

times used "in the form of persuasive communication to promote proper or preferred be-

havior," which for the purpose of this study associates with the concept of meaning mak-

ing. This is more evident in EfS in that, "social science literature clearly highlights the

need to go beyond ecological and technical knowledge when educating for transformative

action, since sustainable behaviors are motivated by much more than declarative infor-

mation" (Frisk & Larson, 2011, p. 1). Put simply, assimilation of knowledge is not

enough to inspire change, heritage leaders must work to accomplish more than just the dissemination of facts.

In both the interpretative and sustainability informational approaches, heritage leaders strive to discover the learner's level of understanding and then layer in additional concepts and self-derived meaning to that individual or an audience. One of the major contributors in defining the root of the associative meaning-making approach alluded to above was the developmental cultural psychologist Lev Vygotsky. He determined that meaning making was carried out interdependently with external factors and highlighted that it was typically constructed in concert with other processes for the purpose of com-prehending the outside world and development of social integration. His research placed high emphasis around how the process begins for young learners in early childhood as they attempt to make sense of their environment and interact with others in ways that as-sist acculturation to the expectations and social norms of their environment. He also ex-pressed that meaning making was layered upon prior understanding and these meanings scaffold in complexity as individuals mature and engage in social interactions. The con-cept of scaffolding is widely embraced and utilized by formal and informal educators en-gaging in collaborative meaning-making processes with their students. Vygotsky placed high significance on the dependency of social interaction in the meaning-making process since it allowed for "the reorganizing and restructuring of the individual's own knowledge and thinking which would not occur to the same extent if working alone" (Fawcett & Garton, 2005, p. 160).

In this way, Vygotsky reiterated in his studies that the development of a learner is interconnected with their social and cultural environment. "The symbolistic systems that

individuals used in constructing meaning were systems that were already in place, already 'there,' deeply entrenched in culture and language" (Bruner, 1990, p. 11). The cultural norms of a society, including the understanding of the use and function of cultural artifacts, begins in early childhood from those who already possess the information. These cultural tools run the gambit of the use of tangible items like forks or chairs, to more complex intangible things like sharing language or beliefs (Shabani, Khatib & Ebadi, 2010). This cultural learning exchange is interesting as sociocultural influences within the process of meaning making may have larger implications on how people interpret and generate heritage, as well as how they perpetually care for that heritage. This research project aims to reveal areas in which this focused aspect of meaning making specifically applies to those involved in HIn and EfS work. There is additional interest in evaluating how it is collaboratively formed with the assistance of social emotional learning, and what generalized application can this combined understanding offer heritage leaders as they seek to obtain their desired results across a wide spectrum of fields.

Vygotsky illustrates an example of where the interweaving of various fields of study within heritage leadership could possibly produce collaboration and significance in the process of meaning making. He personally combined his interests in cultural psychology and early childhood development to generate an understanding of meaning making that has encouraged other researchers to use a meaning-making process to approach a collaboration between the various fields of heritage leadership.

Interconnected works in heritage leadership like that of Jerome Bruner aim to encourage constructive dialogue between cultural psychology and psychological anthropology using meaning making uniting the disciplines such that each could better achieve

specific chosen goals within each field. Researchers Mattingly, Lukehaus, and Throop (2008) argue that Bruner followed Vygotsky's concept of meaning making "to discover and to describe formally the meanings that human beings created out of their encounters with the world, and then to propose hypotheses about what meaning-making processes were implicated" (Burner, 1990, p. 2). His work focused upon the symbolic activities that human beings employed in order to construct meaning to aid in making sense not only of the world, but of themselves.

Viewed in this way, the process of meaning-making can be seen as a constructivist approach combining both an individual's situational interpretation and socially constructed global meaning to help explain their experiences and surroundings.

> Constructivist learning is predicated on the recognition that learning is dependent on the active participation of the learner: The conclusions that learners reach are valuable not because they can be validated as 'true' but, rather, because they are backed by the evidence at hand and because they are the result of making cognitive connections between personal experience and new ideas. (Schaff, Isken, & Tager, 2011, p. 1274)

In other words, it is how individuals come to an impression of meaning both in themselves and in relation to others.

This study looks upon the work of Vygotsky and the socially constructed meaning making aspects of his work. There is another constructivist approach offered by developmental psychologist Jean Piaget, which focuses on cognitively constructed meaning making that adolescent individuals experience in their own minds as they explore the world around them. According to Piaget (1964), children experience four stages of development as they grow, learn, and make meaning of their environment. They begin with a highly sensory experience as young babies and move between the stages to develop a final cog-

nitive understanding of their environment around their teenage years. His theory indicated that this is a naturally occurring phenomena that develops through repetitive exposure to one's environment resulting from the fact that our minds are always constructing knowledge in order to make sense of things (Simatwa, 2010). In essence, "constructivism means that human beings do not find or discover knowledge so much as construct or make it" (Schwandt, 1998, p. 237). To this end, Piaget's research concentrates primarily on the cognitive constructivist approach which is focused on the individual and their personal interpretation of their experience versus co-created learning and interpersonal knowledge transfer as in the case with Vygotsky. It should be noted that, in some cases, there is overlap between the realms of individual understanding and collaboratively-constructed meaning making since each influences the other, however the latter is what will be specifically explored in our study as our participants revel how this driver appears in their own professional social interactions while engaged in HIn and sustainability education. A Vygotskian approach lends itself to heritage leaders seeking to connect with their audiences of all ages in relevant ways to encourage and co-create new understandings and personal meanings around tangible and intangible heritage. Drath and Palus (1994) also have also explored how individual and social meaning making are intertwined, since individuals and groups are influenced by the culture and common experiences they share. They submit that this social interaction provides a foundation for leadership to be utilized as an apparatus in the construction of meaning in order to make sense of our world and shape our worldviews. "The process of making meaning in certain kinds of social settings constitutes leadership. In other words, we can regard leadership as meaning making in a community of practice" (Drath & Palus, 1994, p. 8).

According to literature, social constructivist meaning making within communities has already shown to be of value by providing a platform for increased inclusion in facets of heritage work. Often it is the experts within the various fields that determine the significance of said heritage. However, the literature shows an increasing preference for encouraging non-expert participation from individuals within a social system under examination to voice their personal meaning-making constructions and work towards aspects of collective meaning-making alongside the heritage experts. "By virtue of participation in culture, meaning is rendered, public and shared. Our culturally adapted way of life depends upon shared meanings and shared concepts and depends as well upon shared modes of discourse for negotiating differences in meaning" (Bruner, 1990, p. 13).

There is a high value to allowing those most connected with an artifact or place to have input into the identification and preservation of that heritage. Waterton, Smith, and Campbell (2006) point out that there is still much work to be done around this inclusive approach and state that "conservation, interpretation and management of a place should provide for the participation of people for whom the place has special associations and meanings, or who have social, spiritual or other cultural responsibilities for the place [and] Co-existence of cultural values should be recognized, respected and encouraged, especially in cases where they conflict" (p. 349). It is important to keep this in mind and advocate for inclusion in the meaning-making process when engaged in discourse around the formation, definition, and meaning of what constitutes heritage and the leadership associated with that process. Our own exploration into the process of meaning making

within a heritage leadership community of practice is hoped to illuminate areas of con-

nection and disconnect previously unknown in order to contribute to the ongoing process

of synthesizing the fragmented fields of heritage leadership.

Social and Emotional Competencies

Any discussion of the definition of heritage leadership must also include the who

and what of heritage leadership. Chapter four will discuss further how heritage leaders

describe the skills they apply to their work, here we briefly address how social emotional

competencies or 'soft skills' appear in the literature, as shown in Table 2, and how they

lead to qualities that make for successful leaders.

What characteristics and traits are necessary to make a good heritage leader? In

the past, this question has been addressed by identifying the strengths, skills, compe-

tences, and/or competencies of the individual actor within their professional role. For this

particular project, both the "hard" and "soft" skills will be examined, both competences

and competencies, necessary to become a good heritage leader. Knowing that strengths

may be innate or learned, and that skills and competencies both identify an ability, these

terms may also be used in this research. For this purpose, drawing from the field of edu-

cation, the following terms will be used:

> **Competence** (plural: competences): is a work-related concept and describes the
> things people are expected to do in their work to perform effectively. Compe-
> tences are often referred to as 'hard skills' and can be identified through func-
> tional analysis to establish what people in particular roles have to be able to do
> and the minimum standards they are expected to achieve.

> **Competency** (plural: competencies): is a person-based concept that relates to the
> behavior lying behind a competent performance. These are usually behavioral
> characteristics often referred to as 'soft skills' that mark the individual out as su-
> perior in his or her role to others in a similar role. ("National College for Teach-
> ing and Leadership", n.d.)

Table 2: Social Emotional Competencies Concept Synopsis

Competence / Competency	Subcategories / Synonyms	Examples	Citation
Intrapersonal	Emotional intelligence competencies Personal leadership competencies Self-focused competencies Affective competencies Moral competencies Behavioral competencies	Preventative self-care Self-awareness Self-management Honesty Integrity Responsibility for decisions Possession of conscience, values and virtues	Mumford, Campion, & Morgeson, 2003 Boyatzis, 2008 Shum, Gatling, & Shoemaker, 2018 Brundiers & Wiek, 2017 Sharma, 2017
Interpersonal	Social intelligence competencies People leadership competencies Other-focused competencies Normative competencies	Effective and compassionate communication Social awareness Relationship management Conflict management Empathy Teamwork Dialogue with stakeholders Humaneness / compassion Generosity Service to the greater good Social-ecological integrity	

Cognitive	Factual Competences Conceptual Competences Metacognitive Competences	Concrete domain knowledge Systems-thinking Pattern recognition Advanced continuous learning	Mumford, Campion, & Morgeson, 2003
			Boyatzis, 2008
			Hutchings & Corr, 2012
			Wiek, Redman, & Mills, 2011
			Brundiers & Wiek, 2017
			Sharma, 2017
Strategic	Anticipatory competence Strategic competence	Forecasting / Backcasting Visioning Multi-criteria assessment Risk assessment	Mumford, Campion, & Morgeson, 2003
			Wiek, Redman, & Mills, 2011
	Business skills "Hard Skills"	Responsive project management	Mumford, Campion, & Morgeson, 2003
			Hutchings & Corr, 2012
			Shum, Gatling, & Shoemaker, 2018
			Brundiers & Wiek, 2017

In addition to the contrast between the terms "competence" and "competency," the use of the term, "soft skills" should be noted. The term "soft" denotes many things, and in the past, "soft" has been perceived of as "less." Cultural bias, unconscious gendered divisions of skill sets (Hong, 2016), and a myriad of other reasons may have contributed to some readers' dislike of the term, and the historical devaluation of soft skills in general. In our work, the use of the terms "soft skills," "hard skills," "competence," and "competency" are embraced without any positive or negative connotation.

According to Boyatzis (2011), competency research and applications arrived in 1970 attempting to explain the talent of people who are effective. It built upon earlier work on skills, abilities, and cognitive intelligence (McClelland, Baldwin, Bronfenbrenner, & Strodbeck, 1958; Campbell, Dunnette, Lawler, & Weick, 1970) and preceded the work on emotional and social intelligence (Salovey and Mayer, 1990; Goleman, 2006). Currently, the emotional and social intelligence competencies account for a substantial and important amount of the variance in predicting or understanding performance in competency studies (Boyatzis, 2008).
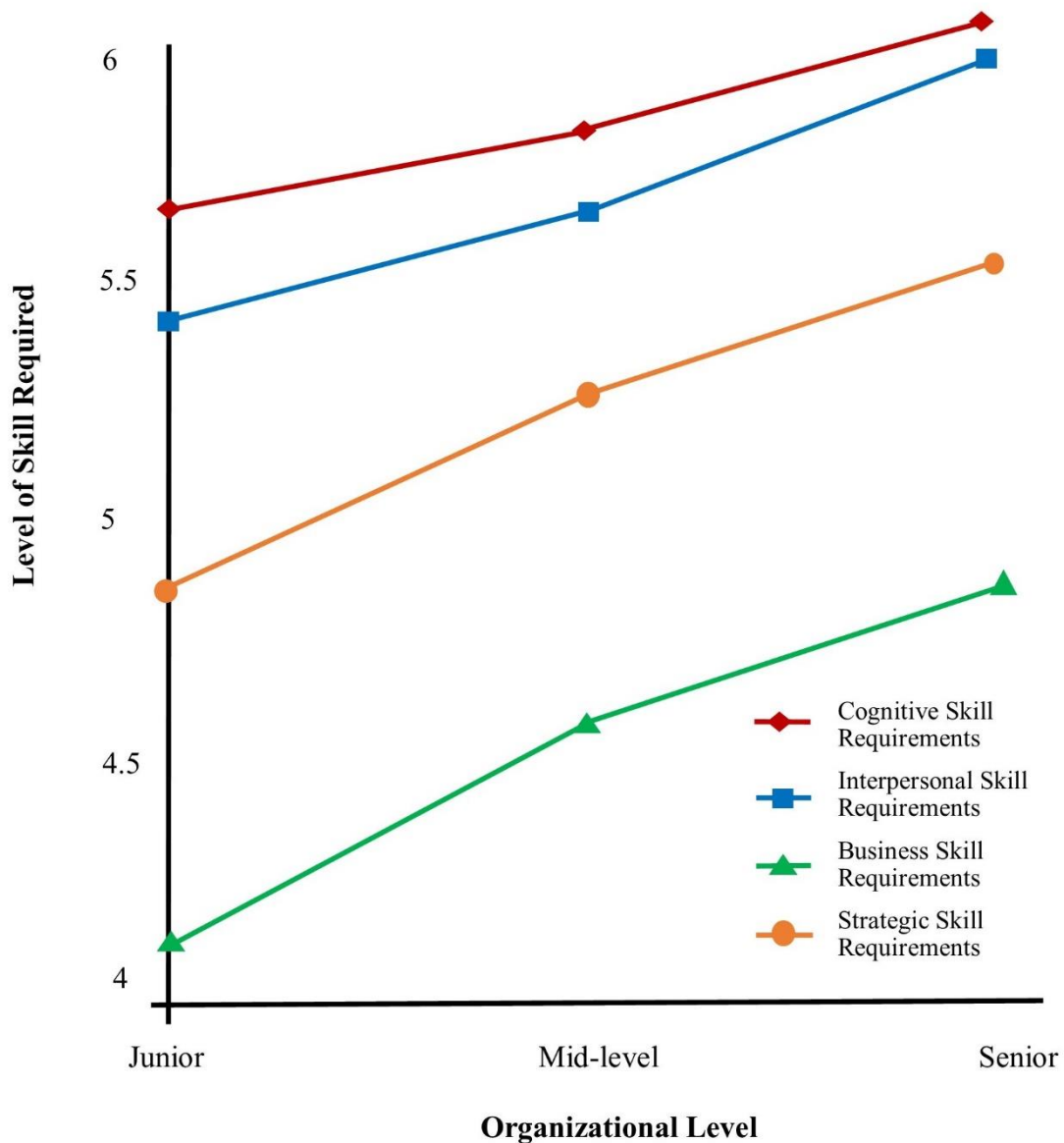
Figure 1. **Leadership Skills**
Source: Adapted from Mumford, and Morgeson (2007)

As described by Mumford, Campion, & Morgeson, leadership skills, as shown in

Figure 1, can be categorized into four general categories: (1) Cognitive skills, (2) Inter-

personal skills, (3) Business skills, and (4) Strategic skills, and no matter the leadership

level within an organization, Cognitive and Interpersonal skills are most required (Mum-

ford, Campion, & Morgeson, 2003).

Although the skills and categories used by Mumford, Campion, and Morgeson (2003) do not easily fit in to the same categories used by Boyatzis, the emphasis on the cognitive and interpersonal abilities, or emotional and social intelligence, remains.

Boyatzis (2008) states that outstanding leaders, managers, advanced professionals appear to require three clusters of behavioral habits as threshold abilities and three clusters of competencies as distinguishing outstanding performance. The bare minimum, or threshold clusters, of competencies include:

1. Expertise and experience;

2. Knowledge (i.e., declarative, procedural, functional and meta-cognitive); and

3. An assortment of basic cognitive competencies, such as memory and deductive reasoning.

The three clusters that mark outstanding performance include:

1. Cognitive competencies, such as systems thinking and pattern recognition;

2. Emotional intelligence competencies, including self-awareness and self-management competencies, such as emotional self-awareness and emotional self-control;

3. Social intelligence competencies, including social awareness and relationship management competencies, such as empathy and teamwork.

Given that cognitive, emotional and social intelligence competencies have been identified as markers of outstanding performance in leaders, the same or similar characteristics are expected to emerge upon examining the similarities between heritage leaders. Because heritage leadership is still emerging as a field of study, the desired skill sets or competencies have not yet been formally prescribed. "Most professional bodies will have a competency framework, often referred to as 'professional standards', that members will

be expected to meet. These professional standards normally identify a set of core compe-

tencies that everyone is required to satisfy, followed by a differentiated set of competen-

cies, possession of which depends on the level of experience and career stage of the indi-

vidual" (National College for School Leadership: ADSBM Phase 2, 2009). The National

College and the National Association of School Business Managers (NASBM) published

this first SBM competency framework in 2009. Research from other professions and

fields of study may offer guidance in defining the core competencies of heritage leader-

ship, as similar attempts to pinpoint the actions and behavior needed for successful lead-

ers have been undertaken in many other professions.

In perhaps the most closely related example, according to Hutchings & Corr

(2012) specific descriptors for the Conservation–Restoration profession have been devel-

oped by the European Confederation of Conservator-Restorers' Organizations. Upon de-

scribing the attributes that must be possessed by anyone wishing to enter the Conserva-

tion–Restoration profession, which is devoted to the preventive and remedial treatment of

cultural heritage objects, a framework of interconnected competences/competencies was

developed. Additionally, this framework includes a combination of cognitive, physical,

motivational, ethical, volitional and social components. Hutchings and Corr (2012, p.

439) claim to "uncover the topography of Knowledge, Skills, and Competence required

for access to this profession," and using a concept map, they visually represented the lev-

els of knowledge and skill required for the profession. The resulting conceptual map is

interesting; as a process-oriented depiction, it allows for the characterization of links be-

tween areas of competence while remaining hierarchical. The concept map was later used

to create a robust description of what was meant by highly specialized knowledge, specialized problem solving skills, and ultimately, competence in the field, but more importantly, it also focused on "the level of 'knowingness'" needed by someone entering the profession rather than attempting to specify the actual knowledge and skills considered necessary to carry out a particular task within a given set of circumstances (Hutchings & Corr, 2012).

The National Association for Interpretation (NAI) has embraced the idea of identifying the core competencies and skills that individuals involved in HIn wield for effective work and leadership in this field. As part of a process that began in 2016 and was ongoing at the time of our research (2018-19), NAI conducted focus groups, interviewed individuals involved in HIn, held listening sessions, and examined job descriptions from hundreds of members of the organization and individuals in aligned professions. Data was coded and sorted into over 180 identified, meaning units. Coding identified 39 skill areas associated with management. Other areas of leadership appear within the data gathered including: Interpretive Planning (13 skill areas), Interpretive Training (23 skill areas), and Other (25 skill areas). In fall of 2018, NAI was seeking to further refine and organize the competences and competencies identified (Retrieved from: https://interpretationstandards.wordpress.com) and, at the time of this writing, is working to apply those standards to professional certification programs offered by the organization.

In the hospitality sector, research has clustered hospitality leadership competencies into three factors: 1) business leadership competencies—defined as competencies required for managing business functions; 2) personal leadership competencies—defined as self-focused competencies required for a personal growth and interpersonal needs; and 3)

people leadership competencies—defined as other-focused competencies required for leading and developing subordinates (Shum, Gatling, & Shoemaker, 2018).

Similarly, in the sustainability sector, research has identified the most commonly used set of competencies for those working as sustainability professionals. Fourteen professional bodies in the United Kingdom launched an initiative called Professional Practice for Sustainable Development (PP4SD) identifying what all sustainability professionals should know, and then in 2007, the Winnipeg-based International Institute for Sustainable Development (IISD) produced a white paper listing the skills and mindsets associated with sustainability professionals (Willard et al., 2010). Wiek, Redman, & Mills (2011), posit that mastery in the professional field of sustainability is composed of five key competencies, which include systems-thinking competence, anticipatory competence, normative competence, strategic competence, and interpersonal competence. The latest research suggests a need to expand upon the interpersonal competency, broadening the range of competitive professional skills to include effective and compassionate communication, responsive project management, advanced continuous learning, and preventative self-care (Brundiers & Wiek, 2017).

As the business sector begins to embed social responsibility and sustainability into its management education and practices, various competency models have emerged. For example, Sharma (2017) developed a competency framework and a competency model for the UN-supported initiative "Principles for Responsible Management Education." The competencies mentioned in Figure 2 were classified into four broad clusters: cognitive competencies, affective competencies, moral competencies, and behavioral competencies. Cognitive competencies included concrete domain knowledge. Affective

Sustainable Development

Responsible & Sustainable Mindset

Knowledge	Emotional Social Intelligence	Values and Attitudes	Skills and Behavior
Cognitive Competencies (C)	Affective Competencies (A)	Moral Competencies (M)	Behavioral Competencies (B)

Building Blocks of Responsible Management Education
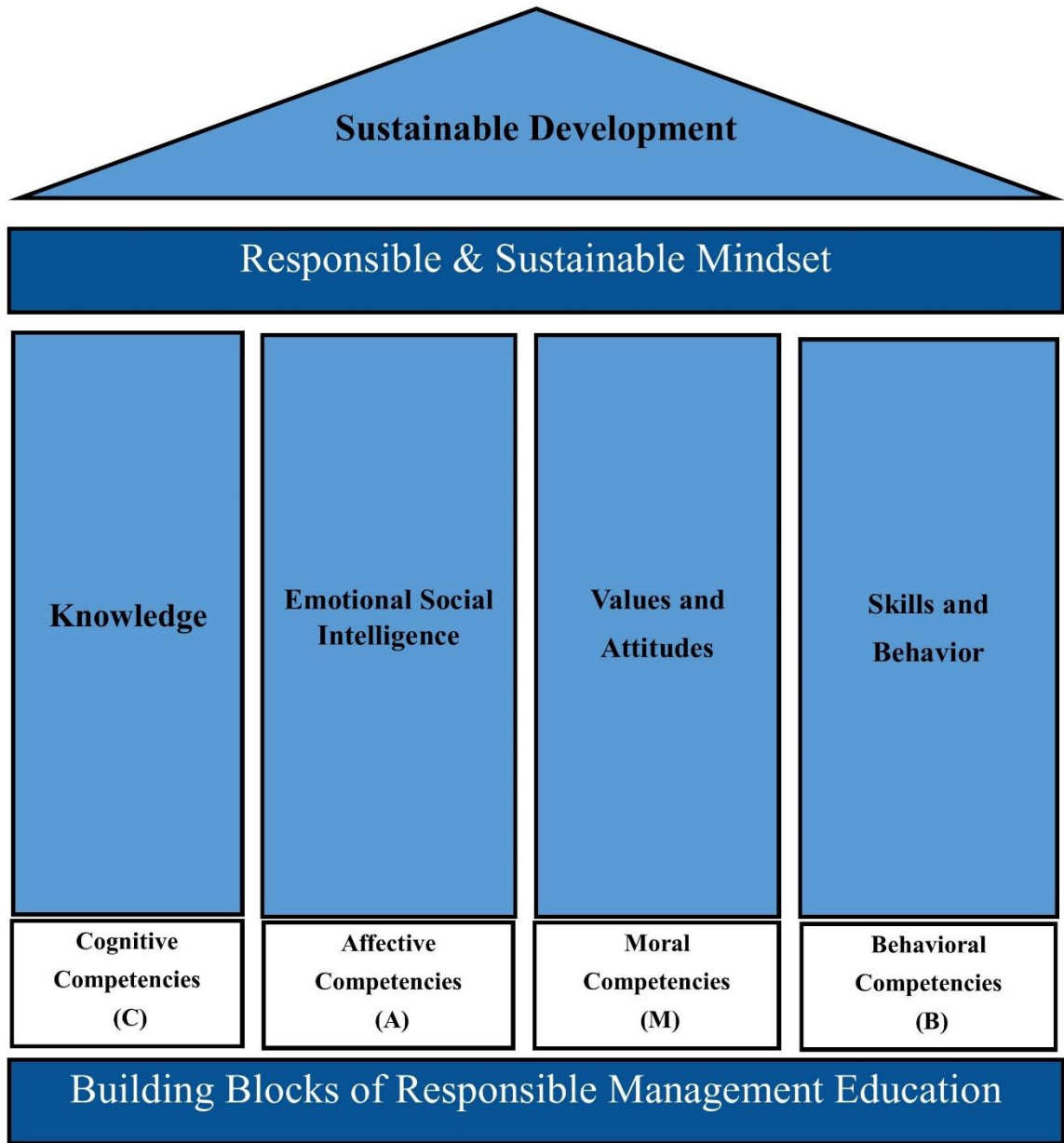
Figure 2. **Competency Model**
Source: Sharma, 2017

competencies related to the realm of emotional/ social/ spiritual intelligence, and included

empathy, relationship orientation, humaneness, compassion, generosity, and service to

the greater good. Moral competencies referred to traits such as honesty and integrity, or

the possession of conscience, values and virtues. Behavioral competencies comprised

skills and behaviors such as taking responsibility for decisions, standing up for what is right, conflict management, and partnership and dialogue with stakeholders (Sharma, 2017).

Again, although the categorization does not conveniently match the same categories used by Mumford, Campion, and Morgeson (2003) or Boyatzis (2011), the emphasis on the cognitive, emotional and social intelligence abilities remains. One would expect certain characteristics to be exemplified by those engaged in leadership activities across all sectors. In an attempt to create a cross-industry approach to foundational skills, the National Network of Business and Industry Associations went so far as to identify the "Common Employability Skills" for all jobs. These included the Personal Skills, People Skills, Workplace Skills, and Applied Knowledge (National Network of Business and Industry Associations, 2014).

Further examination of the data sets of past research and lists of skill sets from various sectors could prove beneficial in identifying codes for our own work and our work may assist professional organizations further their efforts. As we looked to those in roles of heritage leadership, it was our intent to identify similar qualities and competencies despite heritage leaders' seemingly disparate job descriptions.

As we moved forward with assessing characteristics, skills, and behaviors, we settled on a working definition of SECs which includes both the interpersonal and intrapersonal abilities "necessary to understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions." This definition stemmed from the Collaborative

for Academic, Social, and Emotional Learning (CASEL) work on social and emotional development (Domitrovich et al., 2015).

There is a problem, however, with simply compiling a list of desired traits in future heritage leaders. Not only does such an approach fail to consider the holistic perspective and conceptualization of personality as explained by personality theory, it does not account for cultural relativism (Boyatzis, 2011). This raises the question, is the procurement of knowledge enough to encourage behavior change and improve social emotional competencies? According to a literature review conducted by Bolden and Gosling (2006), several apparent weaknesses emerge in an information-only based approach. Their research revealed that 1) most approaches examine only a piece rather than take a holistic view to personal and professional development; 2) it assumes that competencies can be generalized to all individuals and scenarios; 3) the emphasis on looking backward over past performance versus looking at how to approach future situations; 4) the propensity to have evaluations focus on competencies that are easily or visibly measurable and not account for more subtle interpersonal or contextual attributes; and lastly, 5) the cursory standardized approach to offering education at the workplace that does not account for the specific growth needs of individuals.

Hutchings and Corr (2012) noted something similar, in that defining the knowledge, skills and competences required for a profession in a single statement created a descriptor "too general to be meaningful" (p. 441). They warned that tying the social and emotional competence research to professional development runs the risk of becoming both prescriptive and outmoded from the outset, giving rise to the distinct danger that

a simple statement of knowledge, skills and competence would cause access requirements

to that profession to become fixed.

It is evident that weaknesses in targeting, applying, and evaluating competencies

exist, and some of the ones mentioned above were not addressed in the scope of our

study. Nonetheless, it is crucial to understand that competency frameworks and models

can be used not only as a basis for talent acquisition processes, but also for curriculum

and class designs, and in the training of future heritage leaders.

Impacts and Outcomes

The previous sections on heritage, leadership, meaning making, and social emo-

tional competencies illustrate key aspects of the heritage leadership process and the com-

plex components involved in the process. However, without a discussion of the outcomes

and impacts of the work being done by heritage leaders, we would be failing to address

the reasons why it is crucial that heritage leadership efforts be effective in the first place.

Impacts that occur as a result of heritage leadership efforts are, perhaps, the key motiva-

tion for the work of heritage leaders. As we alluded to in the sections above, heritage

leaders are often at work on issues of great societal importance such as striving to moti-

vate others to adopt a more sustainable existence on the earth, persuading others to ad-

dress environmental challenges such as climate change, or inspiring and provoking be-

haviors that protect and preserve natural and cultural areas (Ham, 2016). Successfully ad-

dressing complex social and environmental issues like these and others like them are fre-

quently beyond the abilities of individuals, or even individual groups to accomplish. In

many cases, effectively addressing complex issues requires the coordinated efforts of multiple groups.

One outcome of effective heritage leadership may be what Kania and Kramer (2011) refer to as the process of effectively merging the efforts of multiple groups into a unified drive to address a social issue. They labeled this leadership outcome as "Collective Impact." Since the initial proposal of this concept, substantial amounts of work have addressed the power of their model to address change (Greene and Cosgrove, 2017; Kania, Hanleybrown, & Splansky-Juster, 2014; Kania & Kramer, 2015; Weaver, 2016). It is critical for heritage leaders to understand this powerful model for uniting the efforts of multiple groups towards addressing the largest issues that heritage work faces. However, it is also necessary for heritage leaders to address other outcomes of their work that are, perhaps, only evident on a smaller scale than the grandiose solutions needed to solve the problems that collective impact work is applied to.

Outcomes of heritage leadership may include many of the types of outcomes sought by agents of change in other settings and professions. The ability to inspire others to change, to foster creative thought, to inspire engagement, to support resilience in communities of practice, inspire community engagement, and more (Algera & Wiersma, 2011; Banks, McCauley, Gardner, & Guler, 2015; Diddams & Chang, 2012; Gardner, Cogliser, Davis, & Dickens, 2011; Rego et al., 2012) are all in alignment with the goals of heritage leadership and have been demonstrated to be outcomes of effective leadership in other sectors. We anticipated similar outcomes to be cited as actual or desired outcomes of the heritage leadership process by the participants in this study and were well

aware that other, unanticipated outcomes might also be identified in the course of this study.

Conceptual Framework

Our exploration of the concepts of Heritage, Leadership, and Skills/Competencies in the literature, and our discussions with peers and one another led us to the point where we felt that there was strong benefit to be gained by exploring the interactions and inter-sections between these concepts and their relation to the process of heritage leadership. Figure 3 illustrates our initial thinking that the interactions between the concepts of meaning making and SECs, as applied to the process of heritage leadership, are core factors in the process and integral to the key impacts and outcomes affected by heritage leaders.

Heritage Leadership Process
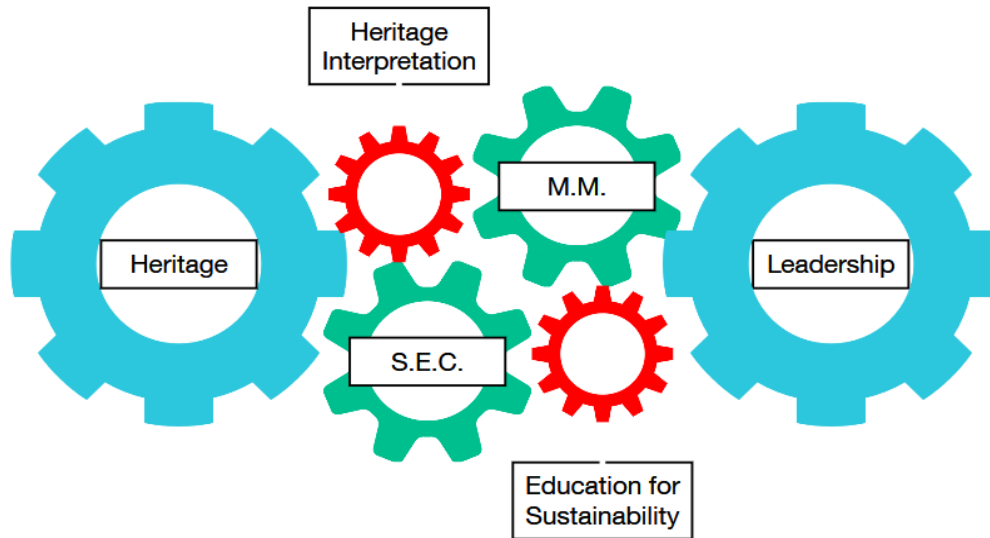
Note: M.M. = Meaning Making and S.E.C. = Social Emotional Competencies

Figure 3. **Heritage Leadership Proposed Conceptual Framework**

Chapter 3: Methodology and Research Process

Initial Methodology

Qualitative Research Paradigm

The aim of this study was to carry out an exploratory, qualitative study of the connections between meaning making and SECs and the process of heritage leadership. This exploration primarily focused on these factors and the heritage leadership process as it is applied to HIn and EfS. A qualitative research approach to this problem seemed particularly appropriate as the purpose of the effort was to explore concepts related to processes that are core to the work of heritage leadership. The strengths and depth of knowledge of the participants was also brought to bear through a qualitative approach which allowed their input to offer descriptive nuance to the study. As we describe below, a modified, grounded theory approach to this qualitative study also allowed for deep exploration of the nuanced comments identified by participants. Finally, a qualitative approach to the study allowed us to seek patterns of coherence within the data through coding of subjects' responses.

Grounded Theory Research Design

We used a modified, grounded theory lens to guide this exploratory effort as new or unexpected concepts were likely to arise. The impetus for this effort and for selecting a grounded theory approach sprang from a project started by the UMSL Heritage Leadership EdD cohort during the spring and summer 2017. Revisiting this project informed Phase 1 of the research effort. The nature of grounded theory allowed for intensive interviewing that goes deeply beneath the surface of ordinary conversation and allowed for

participant (and researcher) reflection during the interview process through the initial use

of broad questions followed by deeper, probing follow-up questions (Hallberg, 2006).

Additionally, the application of the constant comparative method utilized in grounded

theory allowed us to continually fine tune interview questions as our work was informed

by responses we received. Once a saturation point in the data was reached (Cresswell,

2014) and continued collection of new data began to yield diminishing returns, we ceased

data gathering and began deeper, overall analysis.

Role and Bias of the Research Team

It is particularly crucial, in the case of a grounded theory qualitative research

study, to examine the role that the researchers will play in the study. Charmaz (2006, p.

981) asserts that:

> Entering the phenomenon means being fully present during the interview
> and deep inside the content afterward. Not only does this focused attention
> validate your participant's humanity, it also helps you to take a close look
> at what you are gaining.

For the purpose of this study, the research team sought the level of immersion,

that Charmaz (2012) describes in the concepts and phenomena that emerged from the in-

terview process. We desired to place ourselves squarely within the data in order to fully

engage in the process as active participants in the exploration of heritage leadership, ra-

ther than as passive, outside observers of the data.

The research team viewed themselves as active participants throughout the entire

research process. Many of the individuals interviewed were identified initially by per-

sonal knowledge of thought leaders in HIn and EfS held by members of the research

team. Those interviews further informed decisions to invite additional individuals to interview. For example, David Orr was identified as a possible interviewee by two members of the team who were familiar with his work in sustainability. During his interview, Orr suggested that team members each had people in their respective regions who were doing important work in sustainability. He referenced the work of Peter Smerud, executive director of Wolf Ridge Environmental Education Center in Minnesota, who also has a long-standing professional relationship with one of the research team members. Due to this connection and suggestion, Mr. Smerud was then added to the list of potential interviewees. The research team felt that Mr. Smerud's work on a living buildings challenge project and his 35+ year career in environmental education, interpretation, and outdoor education made him an excellent candidate for the interview pool. Based on this suggestion, the group interviewed Peter Smerud. Smerud's thoughts on leadership aided the data gathering process and generated other suggested connections that, while not pursued, could have created a continuing trail of thoughtful and informed interviewees.

Our role as active participants in this research process was also made clear throughout the process as each team member noted at different times how comments or thoughts from interviews were being considered in relation to personal, professional practice. While this was not a stated or predicted result of the project, each team member found themselves on journeys of personal reflection in parallel to this project that were informed by the data gathered and which further led to reflection upon and changes to individual leadership practices.

This intertwining of research with the team's individual experiences and the collaboration as a research team may have added bias to the analysis and interpretation of

gathered data. The team further recognized that this bias influenced the selection of inter-

viewees. The potential impact of biases on this study and the context in which the study

has occurred make it critically important to engage in a robust discussion of the biases

that have been identified and their potential impact on findings, conclusions, and implica-

tions for use of the data. The strategies for mitigating bias within the study will also be

discussed in the sections below.

Cultural bias was one of the issues identified in the early stages of research work.

Each member of the team identifies as white and all have lived most of their lives in

North America. Results of this study will be affected by the cultural lenses the research

team brings to the project and repetition of this study within the context of other cultural

lenses may yield different results. Within the scope of the teams cultural backgrounds,

however, the research team is composed of four individuals with distinct backgrounds,

areas of interest, as well as work histories suggesting that this myriad of personal experi-

ence does add a diversity of viewpoints that assists in reducing bias internal to the cul-

tural lens brought to the project.

Tom Moffatt worked in the field of HIn for thirty-one years in capacities ranging

from front-line interpreter to nature center director to park system administration. His

work has all taken place at local and regional parks in the state of Minnesota. Having

identified professionally as Heritage Interpreter for most of his career and having spent

15 years in administrative roles he recognizes that he has bias related to leadership within

his profession. Along with his work experience, Tom holds a M.Ed. in Environmental

Learning and Leadership. His experience and education may suggest a bias towards a be-

lief that effective leadership is a critical component for HIn to be successful at communicating information about the environment to the larger public. His experience has also led to a belief that leadership is not only connected to positions of authority but that it can occur at all levels of an organization involved in heritage work and emerges from paid staff, volunteers, and members of the public in many ways. Prior to his participation in this program, he had not heard the term Heritage Leadership used to describe work in his profession although he was well familiar with the term HIn and making a connection to the concept of Heritage Leadership was a fairly easy step for him although he found the breadth of occupations represented within the UMSL cohort to be surprising.

Lynn Cartmell is an experienced interpreter and visitor services professional, she spent 12 years working for the National Park Service before transitioning to the U.S. Fish and Wildlife Service. She holds a Bachelor of Arts in history and a Master of Arts in history—museum studies. Her specialization in audience engagement through effective communication has left her struggling with the definition of Heritage Leadership and those who might identify as heritage leaders. Though she has found immeasurable value in participating in the inaugural cohort at UMSL, she recognizes that engagement in this program could, and should, be skewed as a bias as the Heritage Leader phenomenon has not be fully explored or adequately articulated. Similar statements can be made about the fields used to conduct the study.

Tonia Herndon is currently a college professor of Point Loma Nazarene University and former interpretive trainer for San Diego Zoo Global. Working in both formal and informal educational settings has allowed her to draw parallels between the two

methods of teaching, as well as become keenly aware of how the process of heritage lead-

ership could fit into these two professions. Her own educational background includes a

Bachelor of Arts in International Security and Conflict Resolution as well as a master's in

Nonprofit Leadership and Management. Admittedly, the term heritage leader was some-

thing new to her before entering the program for Heritage Leadership at UMSL, and up to

that point her familiarity with and use of the specific term heritage varied between her

two professions. As an interpreter, the term was used to describe the tangible and intangi-

ble resources that natural and cultural interpreters taught about during interactions with

guests. These interactions are typically intended to be more than merely informational,

and interpreters actively work with guests to find personalized ways to include their audi-

ences in preserving the resource they just learned about. As a formal educator at a univer-

sity she has used the term heritage to describe some anthropogenic object or concept of

the past and interactions with students encourages minimal future action other than to in-

sure information retention for a future test or sharing enthusiasm to travel and see some

of these man-made wonders for themselves. Joining the UMSL program has exposed her

to an expanded view of what a heritage leader may possibly encompass, the goals and

professions indicated by heritage leaders, and a growing curiosity to explore how one can

do the root work associated with heritage leadership more effectively.

Katy Mike Smaistrla currently serves as the Sustainable Energy and Environmen-

tal Coordinator at the University of Missouri - St. Louis as well as an adjunct instructor in

Sustainability and Urban Ecology at Harris-Stowe State University. Her work has always

been closely linked to higher education, and because of this she acknowledges she has

had to set aside any preconceptions or misgivings about formal education systems, as

well as the desire to correct misunderstandings about sustainability concepts and best practices. As a doctoral student in the UMSL Heritage Leadership program, she recognizes that she may also hold bias related to the nature of the degree program and wanting to see the program succeed: at the time of this research, she was employed by the same institution at which she was pursuing her degree. The three concepts in the program's subtitle drew her to enroll, and she looks forward to further researching and connecting with students on the interplay between sustainability, social justice, and participatory culture. Having worked in the field of sustainability education for the past thirteen years and spent ten years prior to that in various positions in the fields of outdoor, environmental, and experiential education, she attended to the interviews with a sympathetic ear.

Other Potential Bias

Sampling bias was considered by the research team throughout the process of identifying individuals to interview. During the initial review of interviews conducted by members of the larger, UMSL Heritage Leadership cohort, the selection criteria (see chapter 3) was applied to narrow interviewees to those working in the fields of HIn and EfS. During following stages of research, as suggestions for others to interview emerged from the snowball sampling process, selection criteria continued to be applied but the research team also engaged ongoing discussions with goals of achieving gender balance among interviewees and whether the list of individuals was well balanced between HIn and EfS.

Reporting Bias was also considered from the onset. Individual interests and/or preconceived ideas can color the concepts identified within data. In order to address this,

a team approach was taken to balance the identification, definition, and strategies for the initial coding of our data. The initial list of codes was completed as a group effort over several days as the team worked through coding the first few interviews. As significant concepts were identified for coding, the entire team would discuss the value and necessity of its inclusion. These robust, and sometimes lengthy discussions led to agreed-upon definitions for each code, connections between parent and child codes, and revisions to existing codes. To further avoid reporting bias, all interviews were coded by two members of the team, as shown in Table 3. Team members were paired to code interviews in such a way to ensure that interviewers were not only coding the interviews they had conducted. While reporting bias is always a danger in qualitative research and may connect strongly to confirmation bias, attempts to minimize bias in data reporting were as robust as possible.

One concern expressed by all members of the research team throughout this project has been an awareness of possible confirmation bias. As Nickerson (1998) notes, "Preferential treatment of evidence supporting existing beliefs or opinions is seen in the tendency of people to recall or produce reasons supporting the side they favor" (p. 178). As discussed in the literature review, this research stems from an assumption that Heritage Leadership exists as a definable concept or area of study. This assumption is a by-product of the researchers' participation in a doctoral program focused on the concept of Heritage Leadership that was, as a condition of the program's very existence, an acceptance of this assumption. While we acknowledge this as a fundamental bias of this

Table 3: Researcher Coding Assignments

	Katy Mike	Lynn	Tom	Toni
Bora Simmons	X			X
Amy Lethbridge	X		X	
Cem Basman	X	X		
Jaimie Cloud			X	X
Bill Gwaltney		X		X
Tammy Rach	X	X	X	X
Ted Cable 1			X	X
Ted Cable 2	X	X		
Mark Madison	X		X	
Jon Jarvis			X	X
Rue Mapp	X	X		
Tom McDowell		X	X	
Tucker Blythe	X	X		
David Orr	X			X
Sally Jewell		X		X
Emily Jacobs			X	X
Jerry Gidner		X	X	
Pete Smerud	X			X
Debra Rowe		X	X	
Jaime Van Mourik		X		X
Bob Langert		X	X	
Meghan Zahniser	X			X

work, it is significant to note that many, if not all, members of the doctoral cohort engaged in this program acknowledged a distinct idea of 'knowing,' or 'recognizing', Heritage Leadership when they saw it in action. This 'knowing' is, in and of itself, an acknowledgement we believe that Heritage Leadership is a separate, distinct field of study. However, knowing this phenomenon when it is observed is wildly different than understanding the essential components of Heritage Leadership in action. The research team likened it to observing flight and knowing that things can fly, but not knowing why

or how. After two years of study, the overall cohort failed to reach an agreed upon definition but this feeling of 'knowing it when I see it' remained, inspiring the research team to attempt to further clarify, and define, Heritage Leadership. Although this statement is fraught with assumptions and bias in and of itself, it gives a bit of a window into the robust and ongoing discussion of heritage leadership that has emerged from the work of the cohort and that inspired this project.

Similarly, the psychological desire to be what we say may have influenced the manifestation of the phenomenon (Walton, 2004, p. 3). As researchers, we attempted to control this bias through guarded sharing of our understanding or personal sense of the term heritage leadership. Not all interviewees had heard of heritage leadership in their past experience. Those that had were primarily individuals with backgrounds in the HIn professions. Rather than attempt to acquaint them with the concept, researchers consciously attempted to defer the explanation of key terms asking interviewees instead what they thought specific terms meant. This was more favorable than potentially having interviewees repeat our own definitions back to us. Additionally, we attempted to draw from multiple fields of study, HIn and EfS were our primary sources for interviewees but a few individuals from aligned professional areas were included as well.

Leading question bias and unanswerable question bias were also issues that faced the research team. As noted above, many of the interviewees had not encountered the terms heritage or heritage leadership, in this context, before their interview and several struggled with the terminology. During the coding process, the team identified incidents where it appeared that the interviewer engaged in leading questioning around these concepts. For example, the interview with Debra Rowe included this passage:

> Debra Rowe: The other meanings of, like unspoiled countryside as a val-
> ued object and inheritance related to heritage, no I don't hear that word
> used in that way. I don't know what you're getting at, but maybe that gives
> you an answer. There's this thing about heritage like something you
> owned, like an inheritance, and I don't think we own the planet, I think
> we're just part of it.
>
> Katy Mike S.:   I definitely agree with you on that point for sure. I think
> what we're trying to get at or tie it to is perhaps an international idea of
> how spaces are managed, heritage seems to be a term that may be taking
> off in other places.
>
> Debra Rowe: I'm sorry, heritage you said is a term that's taking off? Is
> that what you said?
>
> Katy Mike S.:   Yeah, it may be a term that's taking off in how other coun-
> tries start to look at sustainable development or natural land management.

Language used by the interviewer, in this case, could be seen to be giving implied importance or weight to the concept of heritage and the impact of this implied weighting should be considered. The interviewee's response, in this case, would seem to indicate that the implied weighting did not impact her thoughts on the matter.

Other areas of inquiry during the interview process also contained unintended priming, such as when team member Herndon engaged in the following exchange while asking Emily Jacobs about the SEC she uses in her work. Jacobs had just shared about the use of vulnerability when team member Herndon expanded, "I've always experienced you as very authentic and vulnerable." To which Jacobs responded, "Authenticity is an-other. Yeah."

Additional examples like the previous one can be found in interviews conducted by all members of the research team and may be the result of inexperience in this type of interviewing. However, although leading statements and questions may have occurred oc-casionally in discussions related to particular concepts, the research team is confident that

this was not a pervasive issue and the information gathered in the interviews in response to non-leading questions contain substantial and significant information related to the concept of heritage leadership and related skills. The fact that the research team encountered multiple occasions where individuals were unfamiliar with the term heritage leadership itself may be unanswerable question bias; however, it may also indicate a need for this research work as a necessary step toward establishing the groundwork of an emerging field of study.

Bounding the Study

Setting

This study was conducted via phone, in-person, and online interviews. The geographic span of the study was intentionally broad and included individuals residing and working in the United States. Informants' professional involvement was also intentionally considered to draw a balance between individuals affiliated with HIn and individuals associated with EfS.

Actors

The informants of this study were drawn from multiple pools. Participants in the 2017 UMSL Heritage Leader Interview Project provided a source of interview responses to use as a launching point for the study. This existing pool of data was used to define an initial scope of concepts to explore and to refine the initial interview protocol. Individuals identified as heritage leaders during 2017 interviews, identified as heritage leaders by members of the EdD cohort, and individuals identified as heritage leaders by members of

this research team were considered for participation. The selection methodology for

choosing heritage leaders to include is detailed in the sections below.

Events

The modified, grounded theory methodology of this study was intentionally open

ended allowing for the research to follow the paths that revealed themselves during data

collection. Events hosted by the professional organizations through which heritage lead-

ers engage were thought to be ideal opportunities and the research team took advantage

of one such event, the 2018 NAI National Interpreters Workshop, to interview several

leaders from the HIn profession. Since all four members of the research team attended

this workshop, it was an ideal opportunity to interview several individuals and to carry

out revisions to the research protocol based on the results of those interviews. The re-

maining interviews took place online or via conference call during the months of Novem-

ber 2018 - March 2019.

Ethical Considerations

We understood the need to be strongly aware of the rights, needs, values, and de-

sires of the informants (Creswell, 2014). We anticipated many of the individuals inter-

viewed were likely to come from areas of work within government agencies, professions

dealing with controversial topics, or from activity sectors where individual opinions that

are seen as differing from the accepted norm may subject one to negative consequences.

In order to protect the informants, we:

1. Outlined the goals and objectives of this study clearly with informants in advance of their participation and informed the subjects of how the data from the study will be used and how their responses will be recorded.

2. Obtained verbal (recorded) or written permission from all participants in the study outlining the level of participation to which they agreed.

3. The initial interview protocol had already received prior IRB approval, refined versions of the interview protocol were submitted to the advisory panel for approval and submitted for additional IRB review.

4. Transcripts and recordings of interviews were made available to informants upon request.

5. Informants had/have the right to withdraw from the study or request, at any time, that their information be used anonymously.

Data Collection Strategies

An initial pool of data was gathered in 2017 by members of the UMSL EdD Cohort. The first stage of our process examined the results stemming from interviews using the initial interview protocol (Appendix C).

Phase 1

During January - August 2018, the research team:

1. Reviewed the initial set of transcripts and identified a scope of concepts found to be present in the data.

2. Reviewed the portions of existing, 2017 interviews where interview subjects ex-
   pressed confusion over the definition of the term heritage leadership in order to
   inform a revision of the initial interview protocol.

3. Explored the interactions between the subjects and interviewers to identify con-
   sistent patterns of discussion or expansion by the interviewers that may have as-
   sisted subjects in understanding the term heritage leadership more clearly as it ap-
   plied to their work.

4. Reviewed the transcripts of the initial interviews to identify other, suggested indi-
   viduals working as heritage leaders who may be interviewed in later rounds of
   data gathering.

5. Revised the original interview protocol to include concepts/challenges identified
   in the first round of interviews and to include follow-up questions that are pre-
   dicted (Appendix C and Appendix D) or are apparent on review of the initial tran-
   scripts.

6. Developed an interview protocol designed to explore, more thoroughly, a subset
   of the concepts identified in the initial pool of interviews

7. Applied for and received IRB approval to move forward with a new research pro-
   ject aimed at exploring concepts arising from the original data.

Phase 2

Once the original interview protocol was revised to reflect the lessons learned
from the phase one efforts and IRB approval was secured, the research team selected six
(6) interviews from the initial pool of heritage leadership interviews to be coded in the

phase 2 process. Interviews from the initial pool were selected based on the criteria below. These individuals were selected because they are highly respected in the fields of HIn and EfS and the team felt that it was important for their voices to be heard in this project. A further, seventeen (17) individuals were identified and interviewed to round out the pool of data for eventual coding. Phase 2 interviews occurred between November 2018 and March of 2019. Individuals identified as heritage leaders were interviewed using the revised interview protocol. The target population for the qualitative data collection of this study included individuals within the field of HIn and EfS who were affiliated with organizations of both formal and informal learning. The participants within the target populations were:

1. Individuals who were over the age of 18, and

2. Individuals who hold or have held a paid or volunteer role related to leadership in HIn or EfS, or

3. Individuals who could be found at any level of achieved or ascribed authority with the organization or social movement for which they are affiliated, and

4. Individuals suggested as leaders in HIn or EfS by participants in the first round of heritage leadership interviews, or

5. Individuals considered to be expert in their field of HIn or EfS by title or acclaim as determined by their peers, or

6. Individuals serving as respected teachers or mentors in HIn or EfS, or

7. Individuals suggested to the researchers by other participants in the UMSL Heritage Leadership cohort, or

8. Individuals with a body of work or experience that has elevated the work of HIn
   or EfS to a new level or that can be considered to be 'above and beyond' the norm
   for routine work in their area of expertise, or

9. Individuals involved in or recognized for setting professional or leadership stand-
   ards for HIn or EfS.

Any or all of these factors were considered by the research team when selecting participants in the second round of interviews.

Individuals identified through the selection criteria above were contacted and asked to participate in this study.

During November - March 2019 heritage leaders identified above were inter-viewed using the revised interview protocol. All interviews were recorded and then tran-scribed using the Trint online application and Rev.com transcription service with final editing and revisions completed by the research team. Interviewers also took written notes during interviews to guide follow up questions and potential revisions to the re-search protocol.

Sampling

The sample size for the qualitative interviews was twenty-two individuals. Six in-terviews were selected from the 2017 project to be coded along with the interviews con-ducted as a part of this study in 2018-19. The six selected from the first pool of inter-views were chosen because of professional affiliations with HIn or EfS. The remaining sixteen were selected using the criteria above. Saturation, which was employed as a part of the grounded theory approach, occurred once 16 individuals had been interviewed. It is

worth noting that, during the interview process, interviewees suggested many more potential participants for the study. Far more names were suggested than could possibly be interviewed for this work. It notable, though, as it suggests that future research in this area will have little trouble identifying possible interview/research participants.

Sampling involved the non-probability sampling technique known as purposive sampling. This sample type typically relies on the researchers' judgment when selecting sample populations and is desirable when particular characteristics of a population will best assist in answering the research questions. This may include populations that possess a specialized knowledge or particular background pertinent to the study at hand (Marshall, 1996). The criteria for participants in this study was specific and was reflected only in a particular portion of the general population so this was be an appropriate approach. Specifically, purposive snowball sampling (Noy, 2008) progressed with an initial sample of individuals who strongly met the selection criteria above and whose input through the interview process lead us to additional individuals, who in turn identify others, and so on, and so on until saturation was met.

Data Analysis Procedures

The exploratory nature of the grounded theory approach used in this study made the analysis of the data particularly crucial because each examination of a set of responses revealed new pathways of exploration and new ways to link the concepts being studied into the eventual descriptive narrative we created (Creswell, 2014). Transcripts of each interview were uploaded into the web-based analysis program DeDoose and coded to identify responses related to heritage, leadership, meaning making, and SECs.

During this initial transcribing and reading, certain themes emerged which then were placed into written meaning units with interpretation open to the discretion of the researchers (Wertz, 1983). The empirical theoretical framework used to identify the categories of meanings used in this study involved axial coding.

While searching for these grounding concepts, other concepts that heritage leaders identify as crucial to their success were identified. These concepts were also considered to test whether or not they fit within the proposed conceptual framework they suggested a need to revise the model and associated questions for future interviews. Coding while using the grounded theory method produced a looping effect where new concepts revealed required us to loop back to previously reviewed transcripts to search for similar themes before looping forward to new transcripts that were similarly reviewed for these themes (Charmaz, 2004). The process looped forward and back several times before a saturation point in the data was reached.

Reliability and Validity

Because of the exploratory nature of this study, it was extremely important to engage in thorough validity testing of our data before proposing a final result. Validity testing was carried out in several ways.

1. **Expansion of data:** the existing pool of transcripts already represented a reasonably diverse group of individuals from diverse backgrounds and professions. Interviewee selection sought to continue to expand the diversity of individuals sampled.

2. **Peer Examination:** other colleagues, including members of the UMSL Heritage Leader cohort not affiliated with this heritage leadership project as well as individuals affiliated with professional organizations and associations, were asked to review data and offer feedback. A certain amount of this also took place within the research team itself with members questioning one another about conclusions reached and data supporting those conclusions. The peer examination, internal to the research team, continued throughout the process of coding, sorting, and forming of conclusions.

3. **Member Checking:** participants were given the opportunity to review full transcripts of their interviews for accuracy. All interviewees were contacted and offered an opportunity to review direct quotes in the context of the entire dissertation document. Multiple attempts were made to contact interviewees who didn't respond to the initial request for review and comment. In all, 15 of the 22 interviewees responded. No significant edits were requested although several participants requested minor edits to clarify meaning or to adjust word choices in their quotes. These requests were respected, and the final version of the document reflects the requested edits.

4. **Participatory Research Methodology:** interview subjects will also be invited to review the final conclusions of this study for feedback on whether we have captured an essence of heritage leadership that resonates with them (James, 2008).

5. **Discrepant Information:** themes that emerged and ran counter to or didn't seem

   to fit with the proposed conceptual framework were identified and discussed.

6. **Use of Rich, Thick Description:** The results of the study were written in such a

   way as to "transport readers to the setting" (Creswell, 2014). The themes and con-

   cepts identified in the study were discussed and described using the participants

   own language to highlight the strength of concept connection to the work of herit-

   age leaders.

Research Processes in Action

Helmuth Von Moltke (1993) has famously been paraphrased as stating that no

plan of battle survives first contact with the enemy. In much the same way, it's unlikely

that any plan to engage in a grounded theory exploration of a topic will survive beyond

the first round of interviews. Much was the case in our work. Protocol revisions, attention

to potential bias, and more were all considerations that the team had to address through-

out the research process.

Participant Portraits

Transcripts of interviews with twenty-one individuals working in HIn or EfS were

reviewed for this project. Of those transcripts, six were the product of the 2017 interview

project conducted by the entire UMSL Heritage Leadership cohort. Fifteen were new in-

terviews conducted by members of this research team. Two individuals, Ted Cable and

Amy Lethbridge, were interviewed as a part of the first project and were re-interviewed using the revised interview protocol created for this project to solicit feedback on the revised protocol from a previous participant. Both shared that they found the revised protocol to be more focused, but also more challenging that the original. Eleven of the respondents identified as male and nine as female. Individuals came from higher education, private non-profit, federal, state, and regional government agencies. (Appendix B).

Phase 1 Interviewees

Individuals in the Phase 1 pool of transcripts were interviewed by members of the UMSL Heritage Leadership Cohort during the summer of 2017. From that larger pool of interviewees, we chose the transcripts of interviews with the following individuals with backgrounds related to HIn and EfS to assist us in creating a revised interview protocol.

Jonathan (Jon) Jarvis is the Executive Director of the Institute for Parks, People and Biodiversity at the University of California, Berkeley, focused on bringing science to the many issues facing parks and protected areas around the world. He served for 40 years with the National Park Service as ranger, biologist and superintendent in national parks across the country. In 2009, he was nominated by President Obama and confirmed by the Senate as the 18th Director of the National Park Service (NPS), serving for the entire Obama administration. During his tenure, he added 22 new parks, achieved its largest budget in history and raised over $400 million in philanthropic support. Managing the National Park Ser-

vice through its Centennial, Jarvis focused on several key areas that are critical for the future: stewardship of the places entrusted to the agency's care; maximizing the educational potential of parks and programs; engaging new generations and audiences, bringing out untold stories of women and people of color, and ensuring the safety of National Park Service employees. His blueprint for the agency's second century, A Call to Action, called for innovative, ambitious, yet practical ways to fulfill the National Park Service's promise to America in the 21st century. Jarvis is the recipient of numerous awards and recognitions including the National Recreation and Park Association's Legend Award, Sierra Club's Edgar Wayburn Award and Trailblazer Award, International Union for the Conservation of Nature's Fred Packard Award and the American Alpine Club's David R. Brower Conservation Award. In 2018, he co-authored "The Future of Conservation in America, A Chart for Rough Water" (UC Chicago Press) with his former science advisor and Clemson Professor, Dr. Gary Machlis.

> "And I think one of the key attributes of effective leadership, or for heritage leadership, is that you set aside some amount of your time to be thinking as a long view, be acting on behalf of the long view, and not completely absorbed in the immediate demands of whatever the issue is or the resource or the idea."

Mark Madison is an environmental historian and historian of science. Currently he serves as the National Historian for the U.S. Fish and Wildlife Service. Dr. Madison conducts educational outreach, designs museum displays, and helps maintain the 500,000 item National Conservation Training Center Archives and Museum. Dr. Madison also teaches environmental history, environmental ethics and environmental film at Shepherd University. He has previously taught evolutionary

biology, history of science, and philosophy of science at University of Melbourne and Harvard University. Dr Madison spent 2 1/2 years doing tropical reforestation in the Philippines as a U.S. Peace Corps Volunteer. He grew up in Wisconsin and is currently living in Hagerstown, MD while working in Shepherdstown, WV. His passions include fly fishing and family.

Dr. Madison holds a PhD in History and Philosophy of Science and Technology from Harvard University and Bachelors' degrees in History and Biology from Macalester College. He has also served as a founding member of the Kijana Educational Empowerment Initiative in Kenya and is a co-founder of the American Conservation Film Festival.

> "Effective heritage leadership, at least the way we do it here, is an attempt to use our history both to learn from past mistakes and to inspire folks to carry our future work…to learn from past mistakes. We did a lot of things in the past that we thought were good ideas, that weren't."

Rue Mapp is the Founder and CEO of Outdoor Afro, a national not-for-profit organization. Rue oversees a carefully selected and trained national volunteer leadership team of 80 men and women who represent 30 states around the US, and shares opportunities to build a broader community and leadership in nature. Her work has generated widespread national recognition and support. Since Outdoor Afro's inception in 2009 as a blog, Rue has captured the attention and support of millions through a multi-media approach that is grounded in personal connections and community organizing. From its grassroots beginning, Outdoor Afro now enjoys national sponsorship and is recognized by major organizations for its role in addressing the ongoing need for greater diversity in the outdoors. In 2010, Mapp was invited to the Obama

White House to participate in the America's Great Outdoors Conference, and subse-

quently to take part in a think-tank to inform the launch of the First Lady's "Let's Move"

initiative. She was appointed program officer for the Stewardship Council's Foundation

for Youth Investment to oversee its grant-making program from 2010-2012.

Mapp remains in high demand to speak around the country and in Canada about

her innovative approach that has successfully connected thousands, especially from the

African American community, to nature and the benefits of spending more time outdoors.

She is proud to serve on the Outdoor Industry Association board. In 2014, Rue was ap-

pointed to the California State Parks Commission by Governor Jerry Brown. She was re-

cently named a National Geographic fellow for 2019. A graduate of UC Berkeley (with a

Degree in Art History), Rue's skills and background make her a unique voice via the

leadership and programs she has instituted through OA, enlightening a diverse commu-

nity to the wonders and benefits of the outdoors.

> "I think because of the platform we use, nature. Nature in and of itself
> lends itself to, how can I say it, it's an open source platform that allows all
> those definitions of who we are that we give ourselves or that others give
> us. It really neutralizes those. And I feel like for us it has been an im-
> portant platform to clear away and put everybody on the same playing
> field. Basically, it is this the ultimate open-source platform that allows
> people to shed those labels and really connect with each other."

Tom McDowell retired in November 2017 as Associate Super-

intendent for Three Rivers Park District, concluding a 39-year

career with the organization. During his tenure with the Park

District, Tom worked in a variety of positions including Inter-

pretive Naturalist, Outdoor Education Supervisor, Division

Manager, Director of Natural Resources Management and Associate Superintendent for

Recreation, Education and Natural Resources Management.

Three Rivers Park District is a regional natural resources-based organization

charged with managing 27,000 acres in the Twin Cities metropolitan area which attracts

11 million visitors annually. The Park District operates an extensive outdoor education

program through four nature centers, a living history settlement, an environmental arts

center, an education farm and a multitude of recreation services.

Prior to coming to Three Rivers Tom taught high school biology and served in the

Peace Corps in Belize. Central America. Tom and his wife, Judy live on a small farm in

Minnetrista, MN where he has raised Icelandic sheep, giant pumpkins, and organic vege-

tables.

> "Why is this the direction that leadership is going or needs to go in? There
> are a lot of things that, once you either take them to the next level or dig a
> little deeper, you find that there is tremendous crossover. These are not
> separate social systems and natural systems, even though, maybe our tradi-
> tional education has kept them separate. They're anything but that. And I
> think that's the realization that we're coming to."

Bora Simmons serves as the founding director of the National

Project for Excellence in Environmental Education. The North

American Association for Environmental Education (NAAEE)

initiated the Project in 1993 to help educators develop and de-

liver effective environmental education programs. The Project

has drawn on the insights of literally thousands of educators across the United States and

around the world to craft guidelines for top-quality environmental education. After

twenty years as a professor of environmental education and teacher education at Northern

Illinois University, Bora retired in 2007 and moved the Project to the Institute for a Sustainable Environment at the University of Oregon. Bora has been actively involved in environmental education research, evaluation, and professional development for over forty years. She served as president of NAAEE; serves on numerous steering committees and boards of directors and was an executive editor of the Journal of Environmental Education. She serves as co-chair of NAAEE's Advisory Council and is a founding editor of the International Journal of Early Childhood Environmental Education.

For her achievements, Bora received the NAAEE Executive Director's Award, Walter E. Jeske Award for Outstanding Contributions to Environmental Education, Award for Outstanding Service to Environmental Education at the Global Level, and Award for Outstanding Contributions to Research in Environmental Education. In addition, she received Project Learning Tree's Gold Star Award.

> "It (leadership) needs to be hopeful but it also needs to be practical and it needs to be inspiring and needs to be persistent…It needs to be thoughtful and needs to be real. It's such a gigantic vision that you have to constantly figure out how to move forward. So, there's that problem solving. But I think that…I keep going back to Hopeful leadership. It needs to be hopeful and it needs to be embedded in that hopefulness and that hopeful message."

Phase 2 Interviewees

We chose interviewees for Phase 2 using the selection criteria identified in our methodology. Interviews with these individuals took place between November of 2018 and March of 2019.

Cem Basman has been a faculty member of the Department of Recreation, Park, and Tourism Studies at Indiana University Bloomington (2003-2012), Department of Forestry, Southern Illinois University Carbondale (1998-2003), Co-Appointment with the Department of Sociology, Southern Illinois University Carbondale (2000-2003), and a Visiting Scientist for the U.S. Forest Service, International Institute of Tropical Forestry (2004-2014). He received his doctorate in Human Dimensions in Natural Resources from Colorado State University in 1998. Previous to his academic appointments, he had a twenty-plus-year career in the recreation and tourism field in both public and private settings, including the operation of a private consulting firm. He has been a state park interpreter and administrator, director of a bird of prey rehabilitation facility, and non-profit corporate administrator and fund-raiser.

Among other appointments, Dr. Basman served as Chair of Tennessee Valley Authority's Land between the Lakes Advisory Council under the Federal Advisory Council Act (1998). Dr. Basman is a recipient of the Fellow Award and former President of the NAI, where he was instrumental in creating an international professional certification program. He is a Certified Interpretive Planner (CIP), Certified Interpretive Trainer (CIT) and a Sanctioned Trainer for the Certified Interpretive Guide Program (CIG) through the NAI.

> "A part of what we do is to allow people to connect with their past so that this will allow a future to happen. That is a very important component of our daily activities, that we be really talking about the past, the present, and the future and link them all together and then run a thread through all of them. I think the term heritage is the one that captures in the best way that I have found. I mean if there is another term, I'll pursue that. I haven't found it. I think heritage fulfills that."

Larry Beck is a professor in the L. Robert Payne School of Hospitality and Tourism Management at San Diego State University. He has authored or co-authored six books including The Gifts of Interpretation and most recently, as lead author, Interpreting Cultural and Natural Heritage: For A Better World (2018). Beck was involved in a $3 million grant from the National Cancer Institute that addresses sun safety behavior in outdoor recreation settings at parks and resorts throughout the United States. The research team published results in refereed journals in the fields of communication, public health, and medicine, including the journal Environmental Research. Beck received the Fellow Award from the NAI, the organization's highest honor and the "Distinguished Faculty Award" for outstanding contributions to San Diego State University, its highest honor. Beck has written more than 100 articles, mostly in the field of interpretation. An ongoing project is his current "Justice for All" column that appears in Legacy magazine, a series addressing the rights of historically disenfranchised groups of people, perhaps especially timely in the current political climate. The series is written in allegiance with NAI's statement on Diversity, Equity, and Inclusion to represent all people and backgrounds.

*Dr. Beck was interviewed by Tonia Herndon and his thoughts were influential on her thinking during this project. Due to a technical problem, his transcript was not available to the full research team for further review and analysis.

Tucker Blythe, a 22-year veteran of the National Park Service, has served as superintendent of Ulysses S. Grant National Historic Site since January 2019. Before coming to the Midwest Region, he served as superintendent of Washita Battlefield National Historic Site, leading the site through the 150th anniversary of the U.S. Army attack on the sleeping Cheyenne village along the Washita River. Tucker's other park service assignments include Oklahoma City National Memorial, Frederick Law Olmsted and John F. Kennedy National Historic Sites in Massachusetts, the Natchez Trace Parkway in Mississippi, the NPS Washington Office in D.C., and Arlington House, the Robert E. Lee Memorial, in Virginia. In addition to his National Park Service experience, Tucker spent time in the private sector as the co-owner and operator of a State Farm Insurance agency in Kansas and as a part-time adjunct professor in the Elliott School of Communication at Wichita State University and in the Mass Communication Department at the University of Central Oklahoma. Tucker holds a B.A. in Historic Preservation from the University of Mary Washington in Fredericksburg, VA, and an M.A. in Communication from Wichita State University.

> "Heritage can mean...it can be very personal, but it's also very universal. It is a universal in this world. And, in terms of what we're talking about, obviously there is a broader sense of what heritage is. It's a shared heritage. Finding those commonalities, finding where we've made mistakes and have that to learn from them (is important)."

Ted T. Cable is Professor Emeritus of Park Management and Conservation at Kansas State University. He earned a BS degree in Biology from the University of Illinois- Chicago, and a Masters' Degree in Wildlife Ecology and a Ph.D. in Environmental Interpretation from Purdue University. He has authored 15 books, several book chapters, four scenic byway video scripts, and more than 250 articles, reports, and presentations dealing with nature, travel and HIn. Five of his 15 books deal specifically with interpretation and two of these have been translated into other languages.

Dr. Cable has traveled and worked extensively in Africa, Asia and Latin America, teaching and consulting about HIn. On three occasions, he has served as Visiting Professor in the Department of Tourism at Blaise Pascal University, Clermont-Ferrand, France and in 2008 as part of a Fulbright award, he taught HIn to tourism students at the University of Bamako, Mali, West Africa. While in Mali he tracked desert elephants near Timbuktu with a National Geographic TV film crew while collecting ecotourism data in villages along the route. Dr. Cable has received teaching awards from the U.S. Department of Agriculture, the U.S. Environmental Protection Agency, and the Kansas Wildlife Federation as well as many teaching, student advising, and faculty mentoring awards from Kansas State University.

In 2005, he received both the William C. Everhart Award as part of Clemson University's George B. Hartzog Environmental Awards Program as well as the Lifetime Achievement Award from the Association of Missouri Interpreters. In 1996, he received

the NAI's Master of Interpretation Award and in 2000 he received their highest honor by

being named a Fellow of the NAI.

> "I think there's a value to preserving heritage and I think there's a value
> particularly to the people who are sort of the owners of that heritage to
> whom that heritage belongs."

Jaimie P. Cloud is the founder and president of the Cloud Institute for Sustainability Education in New York City. The Cloud Institute is dedicated to the vital role of education in creating awareness, fostering commitment, and guiding actions toward a healthy, secure and sustainable future for ourselves and for future generations. The Cloud Institute monitors the evolving thinking and skills of the

most important champions of sustainability and transforms them into educational materi-

als and pedagogical systems that inspire young people to think about the world, their rela-

tionship to it, and their ability to influence it in an entirely new way.

As a pioneer in the field of EfS Jaimie is an international keynote speaker,

thought leader and educational consultant. Jaimie writes and publishes extensively and is

a leadership advisor and curriculum development coach to administrators, teachers and

curriculum specialists in schools and school districts around the country and in other

parts of the world.

Jaimie is an advisory board member for several impactful organizations including:

The Center for Green Schools at the U.S. Green Building Council, The National Sustain-

able Communities Coalition and "The Future We Want" with David Orr and Bill Becker,

and The Findhorn Foundation College. She is on the nomination committee for the U.S.

Department of Education Green Ribbon Schools for the state of New Jersey, an advisory

committee member for The Buckminster Fuller Institute, as well as an editorial board member for The Catalyst Journal. She previously served on the Editorial Board of the International Journal of Education for Sustainable Development and was a founder and principle partner with Peter Senge of the Society for Organizational Learning's (SOL) Education Partnership.

Jaimie is a mentor to doctoral students studying Sustainability Education at Prescott College, she is on the faculty of the MFA Design for Social Innovation program at the School of Visual Arts and is frequently a guest editor for the U.S. Journal of EfS. In 2015 Jaimie was nominated for the Brock International Prize in Education.

> The way I think heritage is being very thoughtful about what to preserve and what to change in order to thrive over time. Not everything we've inherited is something we want to sustain, but we seem to be really good at sustaining/preserving what should have been changed and changing what should have been preserved. So, if we can just get that right, and continually be thoughtful about that, because it will be ongoing forever - If we pull this off and sustain human and other life on the planet…or shall I say when we pull it off…it will be an ongoing conversation. What do we keep? What do we change? And being thoughtful about it. So to me, that's heritage.

Jerry Gidner, a member of the Sault Ste. Marie Chippewa Tribe, brings a wealth of relevant experience to his role as Acting Special Trustee for American Indians. He has served throughout the Department of the Interior in a variety of capacities: Director of BIA, Deputy Bureau Director for Indian Services, Chief of Staff to the Assistant Secretary - Indian Affairs, Deputy Associate Bureau Director for Post-Secondary Education at the Bureau of Indian Education, and Deputy Chief Learning Officer. His most recent assignment was with the Office of Natural Resources Revenue as Senior Program Advisor.

In addition, Mr. Gidner has been an enforcement attorney for the Environmental Protection Agency, a private sector attorney, a freelance journalist, and has worked at the County government level in the Parks and Recreation field.

Mr. Gidner holds a law degree and a Masters' degree in Natural Resources Policy and Management from the University of Michigan and an MBA from American University. He received his Bachelors' degree in Zoology from Michigan State University.

Mr. Gidner has also served as the President of the Board of Directors of Encore Stage & Studio, a non-profit children's theater in Arlington, Virginia. He is also the author of If You Were an Aardvark: An ABC Book Starring Mammals.

> Adding the leadership piece (to heritage) I would think means something about taking a role in preserving or educating about that heritage. When I think about it, that's basically it. There are all these cultures and all this heritage and, if you include natural resources, there are acres and acres of natural places. So, to me then, heritage leadership would be leadership designed to preserve those cultures and educate people about them.

Bill Gwaltney was born and raised in Washington, D.C. Bill was attracted to the out of doors through Boy Scouts and summers at Highland Beach, an African American resort community near Annapolis, Maryland.

For much of his career Gwaltney worked for the National Park Service in both urban and rural assignments. He also served in a multitude of positions from "Buck Ranger" at Prince William Forest Park near Quantico, Virginia, to Assistant Regional Director for the Intermountain Region in Colorado. During his last two years in the National Park Service, Gwaltney was assigned half time to work as the Guest Curator for Military History at the new National Museum for African American History and Culture for The Smithsonian Institution in Washington, D.C.

Gwaltney left the NPS for a position as Director of Interpretation and Visitor Services for The American Battlefields Monument Commission overseas in France where he served for four and a half years.

> "The world we live in, and all that it contains all the natural and cultural history that helps us understand who we are and where we come from. The big question is how do we get folks to understand that this place we call earth, belongs to all of us? If we do not learn to share the big stuff, sharing the little stuff will not make a bit of difference."

Emily Jacobs spent much of her career in the national parks, Jacobs worked for several seasons in the NPS as a seasonal ranger and her most recent tenure in parks was as the Manager of Interpretive Services for the park concession in Yosemite National Park. Prior to this, she also worked at a university doing K-12 teacher ed in Environmental Education and was employed at a nature center as a naturalist. This experience in governmental work, HIn, and coupled with her years as a formal educator made her an idea candidate for her current role as the Certification & Training Manager for the NAI. There she oversees NAI's certification program including managing over five hundred CITs, developing new programs and teaching workshops on interpretive planning and coaching.

> "I think heritage is a complex term, and it's something that when I initially think about heritage I think about […] the stories, I think about it being what's happening in society, what's happening in the context of the stories that we tell whether it be the way that society was in the past or the implications that we experience today."

Bob Langert led McDonald's Corporate Social Responsibility & Sustainability efforts for more than twenty-five years before retiring in 2015. Currently, he is a columnist and editor-at-large for the GreenBiz Group and Senior Sustainability Advisor, The Context Network, the premier global and agribusiness consulting firm in advancing agriculture. His first book, The Battle to Do Good: Inside McDonald's Sustainability Journey, [was] published in January 2019.

Langert has been engaged in social responsibility issues at a global level since the late 1980s, leading environmental affairs, animal welfare, and Ronald McDonald Children's Charities' grants. He was appointed McDonald's first vice president to lead sustainability in 2006 with contributions spanning sustainable fish, coffee, palm oil, beef, packaging, extensive animal welfare progress, protecting the Amazon rainforest, nutrition strategy and CSR reporting, measurement, and accountability. Langert also led the development of McDonald's 2020 Sustainability Vision and Framework. As part of this work, Langert has worked with numerous organizations, including Conservation International, Environmental Defense Fund, Greenpeace, and World Wildlife Fund.

Widely known as a subject-matter expert, Langert has spoken at numerous events for various organizations, including Aspen Institute, Global Roundtable for Sustainable Beef, Lewis University, National Research Council, the State of Green Business Forum, University of Michigan, University of Oregon, and Yale University. He has been featured in a wide variety of media, including ABC News, AdAge, Christian Science Monitor, Crain's Chicago Business, The Guardian, The Independent, The New York Times, and The Washington Post.).

You're not going to get people to follow you with negative energy. It's got to be positive energy. It's got to be something more hopeful something more optimistic…I would always recognize a problem and a challenge. And I might spew out some frustration for a minute or two to kind of vent it all off, but at the end of the day, to me, we have to be cheerful and optimistic as leaders painting a vision of something that is good for people to follow.

Amy Lethbridge grew up running wild through the creeks and forests of Northern California. A 1988 encounter with schoolchildren in Southern California who had never seen the ocean opened her eyes to the deficit of nature that many urban children experience, and her life's passion was found. Amy has worked for the Mountains Recreation and Conservation Authority (MRCA) for over 28 years and is a Deputy Executive Officer. She serves as the pro bono Executive Director of Community Nature Connection, as she did when it was previously named the Mountains Education Program (MEP). Amy has a B.A. in Liberal Studies, a master's in organizational management and a PhD in Leadership and Change and, as adjunct professor at Antioch University - Los Angeles, she was part of the academic team that developed the Master's in Urban Sustainability Degree.

She recently served as the President of the National Association of Interpretation and is a Certified Interpretive Guide, Manager, and Trainer. She has trained tour guides and park/natural area managers in outdoor education and HIn in nine countries.

"Is leadership different in our field versus just general concepts of leadership? I would say that, especially in our field, I think meaning making is really important. I don't know how you do this work without that being a piece of it."

Julie Newman joined MIT as the Institute's first Director of Sustainability in the summer of 2013. She has worked in the field of sustainable development and campus sustainability for twenty years. Her research has focused on the intersection between decision-making processes and organizational behavior in institutionalizing sustainability into higher education.

In 2004, Julie was recruited to be the founding Director of the Office of Sustainability for Yale University. At Yale, Julie held a lecturer appointment with the Yale School of Forestry and Environmental Studies where she taught an undergraduate course entitled – Sustainability: From theory to practice in institutions. Julie came to Yale from the University of New Hampshire, Office of Sustainability Programs (OSP) where she assisted with the development of the program since its inception in 1997. Prior to her work with the OSP she worked for University Leaders for a Sustainable Future (ULSF). In 2004 Julie co-founded the Northeast Campus Sustainability Consortium, to advance education and action for sustainable development on university campuses in the northeast and maritime region.

Julie lectures and consults for universities both nationally and internationally, participates on a variety of boards and advisory committees and has contributed to a series of edited books and peer reviewed journals. Julie holds a BS in Natural Resource Policy and Management from the University of Michigan; an MS in Environmental Policy and Biology from Tufts University; and a Ph.D. in Natural Resources and Environmental Studies from the University of New Hampshire."

*Dr. Newman was interviewed by Katy Mike Smaistla for this project and her comments were informative to Katy Mike's thinking on the project. Her transcript was not available in time for the remainder of the group to review it for the final coding process.
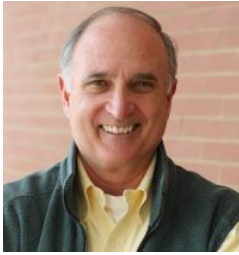
David Orr is the Paul Sears Distinguished Professor of Environmental Studies and Senior Adviser to the President of Oberlin College. His career as a scholar, teacher, writer, speaker, and entrepreneur spans fields as diverse as environment and politics, environmental education, campus greening, green building, ecological design, and climate change. He is the author of six books, including the widely praised *Ecological Literacy* (1992) and *Earth in Mind* (1994/2004); his most recent book is *Down to the Wire: Confronting Climate Collapse*.

In 1996 David organized the effort to design the first substantially green building on a U.S. college campus. The Adam Joseph Lewis Center was later named by the U.S. Department of Energy as "One of Thirty Milestone Buildings in the 20th Century." He has served on the National Advisory Committee of the Presidential Climate Action Project, and is a Trustee of Rocky Mountain Institute and Bioneers.

> "The people that I've known and really admire as leaders, had several characteristics. One was vision. They could see things that other people had a hard time seeing. They could see possibilities where other people saw only problems."

Tammy Rach is the Senior Manager for Volunteer Services, San Diego Zoo. Rach developed and implemented the Volunteer Services Department, which now engages over 2,600 community members in service opportunities annually. Volunteers contribute through over 140 different assignments throughout the San Diego Zoo, the San Diego Zoo Safari Park, the Institute for Conservation Research, and San Diego Zoo Global. Over the past 10 years, SDZG volunteers contributed over 1.85million hours of service, valued at nearly $56million. She is an innovative leader constantly looking for ways to fulfill the organization's mission and improve the guest experience for the 5million annual visitors to the parks. In Rach's 26 years of experience in the zoo and aquarium industry she has also worked for the Minnesota Zoo, the Aquarium of the Pacific, the Los Angeles Zoo, and Dolphin Quest Oahu.

> "Well to me it's that meeting each person where they are, and you can have a volunteer facts spew and give out awesome information, but if they're not making it relevant and meaningful for the individual they're talking to, it doesn't, it doesn't drive action. And that's what we're all about is driving action, so it has to be meaningful and relevant to each learner."

Dr. Debra Rowe is the President of the U.S. Partnership for Education for Sustainable Development. She is also co-founder of the Higher Education Associations Sustainability Consortium, founder/facilitator of the Disciplinary Associations' Network for Sustainability, and Senior Advisor to the Association for the Advancement of Sustainability in Higher Education. Dr. Rowe chaired the Technical Advisory Group and the Green Jobs Policy Community of Action for the American Association of Community

Colleges. She co-created the Sustainability Education and Economic Development Center, the Projects That Matter platform, and the Beyond Doom and Gloom: Engage in Climate Solutions initiative. She is often a keynote speaker at national and international education conferences. She is the author or editor of numerous publications, including the ... encyclopedia, Achieving Sustainability: Vision, Principles and Practices. Dr. Rowe earned a bachelor's degree from Yale University and received two master's degrees and a PhD from the University of Michigan."

> To me, leadership is about listening first, looking at where there are already the competencies that are needed, and looking at where there are gaps in the competencies that are needed, and being able to have so many different competencies that you can style or flex to fill in the holes so that the group that's trying to create the solution, is a better working whole. If you don't have that competency or that set of skills, then you can help find people who do. It's not about being the chair, and it's not about being the one with the most formal power.

Peter Smerud is the Executive Director of Wolf Ridge Environmental Learning Center and has served in this position since 2011. He first entered the Wolf Ridge staff team in 1987. Today, Peter leads a staff team at Wolf Ridge totaling more than 125 people. Wolf Ridge is the largest accredited residential environmental education center in the nation.

In 2016 the US Green Chamber of Commerce named Peter a Minnesota Leader of Sustainability. From 2014-18 he led Wolf Ridge's move into international sustainability leadership with the 45th project in the world and 1st in Minnesota to go above LEED Platinum, designing and constructing two buildings to full certification of the Living Building Challenge, the highest international standard of building sustainability.

> "Heritage leadership feels, to me, like it's the act of bringing together really serious discussions of cultures interwoven with natural and human constructs, both in modern society but also historical perspectives and understanding the interrelationships between them."

Jaime Van Mourik is passionate about educating people of all ages about the impacts of the built environment on their lives. She believes that providing knowledge and opportunities for action will result in true transformation. As Vice President for Education Solutions at the U.S. Green Building Council (USGBC) she leads a team at USGBC who listens, connects and problem solves to identify the right education solution for every learner whether that be a young child, a student pursuing a post-secondary degree or a professional looking to advance in their career path.

A priority for Jaime is preparing students for 21st century careers in sustainability. She does this by working with higher education institutions and advocates across the country to develop and deliver innovative learning platforms that integrate sustainability and green building concepts into curriculum and create pathways to professional credentials. She has led numerous test cases to develop courses and curriculum that drive innovative thinking and creativity in learning. Notably, she oversaw the creation of LEED Lab, a multidisciplinary course through which students asses the performance of their own campus buildings and facilitate the LEED for Building Operations and Maintenance (LEED O+M) process with the goal of certification.

Jaime also spearheads USGBC's higher education initiatives, which includes transforming physical campus spaces while also improving the academic environment so

that all students are equipped to lead. She has extensive experience leading colleges and universities looking to "go green," guiding them through the planning and implementation process and advising on how the Leadership in Energy and Environmental Design (LEED) rating system can help shape sustainability initiatives in teaching, research and practice.

She was responsible for developing USGBC's comprehensive higher education strategy guide, Roadmap to a Green Campus. Jaime is a LEED AP and an Associate AIA member. Prior to joining USGBC, she served as a project manager at the sustainable design consulting firm GreenShape, assisting more than 30 projects pursuing LEED certification. Previously, she worked at the National Building Museum developing and managing educational programs. Jaime has taught design at The Catholic University of America's School of Architecture and Planning and at Northern Virginia Community College and is a visiting lecturer and critic for local D.C. schools. She holds a bachelor's in architecture from Virginia Tech and a master's in architectural history from the University of Virginia.

Jaime's areas of expertise include sustainability education, professional development and curricula; 21st century job preparation; and green campus strategic planning and building design. Recent Bylines and Speaking Engagements [include] April 2018 Op Ed: Sustainability: The Journal of Record, GBC Brazil Interview on Education, University of Maryland Sustainability Fundamentals for Project Manager graduate course, International Sustainable Campus Network, Virginia Tech Washington Alexandria Architecture Center graduate course, UVA Sustainability Leadership Summit 2018, and George Mason University October 2018 Green Jobs Panel."

> The professional competencies that I think are really key, now more than ever, and something we continue to hear employers ask for are the ones that were called the soft skills. So, communications, both in a written and a public manner, being able to speak eloquently, to be able to take technical information and deliver it to different audience groups. To be able to work collaboratively as a team, to have the inner personal skills…and I would say now more than ever it is important to have a cross cultural mindset because we are working in a global world, within a global economy.

Meghan Fay Zahniser is the Executive Director of The Association for the Advancement of Sustainability in Higher Education (AASHE). She has been with AASHE for nine years and previously held the positions of Director of Programs and STARS Program Manager. Prior to AASHE, Meghan worked as Sustainability Specialist at NELSON, where she provided sustainability expertise and consulting services to various clients. She also spent over five years working at the U.S. Green Building Council where, as Manager of Community, she developed and managed a local chapter network for building industry professionals and helped create the Emerging Green Builders program that integrates students and young professionals into the green building movement. Meghan also worked as Environmental Educator for the University at Buffalo Green Office, organizing campus and community education focused on energy conservation, green building, and sustainable living.

She holds a bachelor's degree in Social Sciences, with concentrations in environmental studies and health & human services, from the University at Buffalo, a master's degree in Organization Management and Development from Fielding Graduate Institute and a certificate in massage therapy from the Potomac Massage Training Institute."

> I recognize that leadership doesn't always have to be the big, flashy state-
> ment, the obvious, the overt, the loud, but leadership can also be really
> demonstrated in even small gestures and behaviors.

Interviews and Data Collection

Phase 1

In January of 2018, the 2017 pool of interview transcripts was reviewed to deter-

mine if a pattern of significant concepts could be identified. Initial coding of the tran-

scripts had resulted in the creation of over 400 codes with a significant amount of overlap

and repetition present in the code tree. Reducing this to a manageable number of codes

was the first priority. Similar concepts were grouped with one another and a proposed set

of overall themes was presented to the full cohort. From the initial 400 codes the follow-

ing conceptual areas were identified and presented to the full UMSL Heritage Leadership

Cohort:

Inputs

- Skills: Skills are the knowledge, skills, abilities, and behaviors that identify

  the path to effective action(s) as viewed through the Heritage Leadership lens.

- Actions: Action is the intentional application of knowledge, skills, abilities,

  and behaviors consistent with a Heritage Leadership worldview.

- Defining: Defining is the creation of the meaning framework that includes the

  qualities, characteristics, and understanding of a multi-disciplinary approach

  to Heritage Leadership.

Movement

- Reflection: Reflection is the thoughtful understanding of the Heritage Leader-

  ship process and its anticipated outcomes.

- Assessment: Assessment is the critical evaluation of action, impact, and out-

  comes related to the Heritage Leadership process.

- Opportunity/Risk: Opportunity/risk is the openness to the possibilities of the

  Heritage Leadership process and the courage to break barriers, overcome ob-

  stacles, and engage controversy.

Results

- Impact: Impact is the collective, sustainable outcomes and/or outputs of the

  Heritage Leadership process which includes collaboration with the intent to

  span boundaries and develop and empower culturally competent communities,

  engage controversy, support relevancy and resiliency, while participating in

  social and environmental justice.

Within these conceptual grouping, specific issues identified included: a lack of

clarity surrounding the ideas and concepts related to an understanding of heritage leader-

ship, a lack of a clear delineation of the qualities shared by respected heritage leaders,

and the lack of a clear definition of the term heritage leadership. These gaps in

knowledge inspired the work of this research team.

Protocol Revisions

The next step in the data collection process was to revisit the interview protocol

from the 2017 project (Appendix C) and the related interview transcripts to determine

where previous interviewees struggled with the concepts of heritage leadership. The con-

ceptual areas lacking clear definition identified in the above review of the original tran-

scripts led to a modification of the original research protocol to one that better aligned

with this team's specific research questions. (Appendix D).

This revised research protocol was utilized to guide the initial set of three inter-

views (Jacobs, Gwaltney, Cable). These initial interviews took place in person at the

2018 NAI) Workshop in New Orleans. Researchers observed that the leadership contin-

uum grid used in question five generated answers from all participants that indicated that

the format of the grid was forcing an inaccurate depiction of their leadership activities.

The interviewees felt it asked them to be overly restrictive in describing their preferred

leadership style when, in fact, they tended to flex their style of leadership to meet the cir-

cumstances they faced in their work. The research team revised the visual (See appendix

D) used for question five to a circular plot with 4 axes similar to a DISC personality pro-

file (Marston, 1928). This change was intended to test whether or not a restructured

model resulted in participants being more likely to settle on a description of their predom-

inant leadership style. This revised model was tested in three additional interviews (Rach,

Lethbridge, Basman). The revised visual met a similar reaction to the initial grid, namely

a bit of skepticism as to the validity of the visual model and the dichotomous choices of-

fered on the two axes. Participant Basman suggested, "I think you know if we're going

with the upper left being Quadrant 1... I would say probably Quadrant 1. Because I think

also the other things you might be able to use there are possibly "active" and "passive"

potentially. Maybe passiveness doesn't fit it." He further made suggestions for other

terms that might be considered for the 4 quadrants of the visual. Similar comments on the

terminology came from other participants. This led to a concern that the visual might sug-

gest that a theoretical model of leadership was being tested while the actual goal of the

visual was to gain insight into participants' descriptions of their most commonly used

leadership style. Further, the reaction of interviewees to this question was consistently

that their leadership style is more situational in nature requiring that they employ a vari-

ety of leadership techniques as circumstances warranted. Tammy Rach summed this con-

cept up succinctly stating, "So I, like, splat me on the board because I'm kind of all over

it" (Rach, Personal Communication, December 2018).

This concept of leadership styles shifting as circumstance warrant arose consist-

ently across interviews and led to final revisions made to protocol question 5:

> **Question 5: (Revised)** (used after the first 5 interviews)
> As we've been interviewing others for this study, our previous interviewees have
> indicated that, instead of having one fixed style of leadership, they flex their lead-
> ership style to meet the circumstances of varying situations. Would you say that
> this is true for your own leadership practice or would you say that you tend to
> have one, 'go to' style that you depend on?

Initial Coding/Open Coding

As noted in the bias section above, as the research team strove to minimize report-

ing bias and confirmation bias through a group or team process during open coding of

data. The team met in St. Louis, Missouri, for five days in January 2019 with the express

purpose of creating a framework for analyzing already completed interviews and to lay a

foundational methodology for how the analysis of future interviews would be ap-

proached. Open coding process took place using the online tool Dedoose as a platform

for recording and organizing the results. As a first step, the transcript of Tammy Rach's

interview was jointly coded by the entire team. Starting with five parent codes, (meaning

making, leadership, heritage, heritage leadership, and social emotional competencies),

foundational to the initial research questions, the team negotiated each additional code.

Each time a member of the team identified an idea worthy of its own code, the team

stopped to discuss the concept and voting to include, not to include, or to include the con-

cept in a modified form took place. This process allowed for the inclusion of each team

member's perspective while also ensuring the whole team was working from the same set

of definitions. By the end of the first day of work, the majority of the codes in Appendix

F were identified and defined. As a second step in creating this Appendix, the team split

up the other, completed interview transcripts and teams of two were assigned to each in-

terview. As new, potential codes emerged from other interviews they were noted and the

full research team reconvened to determine whether or not to include them in the master

list of codes, to establish an agreed upon definition for the term, and to identify which

concepts to relate to which parent codes. This process was repeated over a five-day pe-

riod resulting in the coding of six initial interviews and resulted in the master list of five

parent codes and seventy-three child codes represented in Appendix F.

Memo Writing

In a typical process of open coding in a grounded theory study, memo writing

takes place as an important step of the process where the researcher takes time to reflect

on concepts that are emerging during the process and ideas, potential associations, and

other thoughts related to their thinking during the coding process (Hallberg, 2006). The

structure of our team required us to take a somewhat modified approach to this process

that included traditional, individual reflection and note taking but that also included

group reflection and brainstorming sessions. Since our group was separated geographically throughout much of the process, we attempted to make the strongest possible use of our limited face-to-face meetings. The resulting, modified approach to memo writing allowed us to cover a lot of ground in an initial short burst of intensive analysis and was then followed by a longer period of individual reflection and sharing of thoughts back to the larger group.

One example of this process was the team's approach to the code challenges. The initial creation of codes led us to create a code for challenges which we defined as "Barriers, obstacles, attitudes or other challenges to be overcome. Often physical or tangible such as resources or policy but can also be behavioral". This code was identified as a child code under heritage leadership. Simultaneously, the team had also created a code called challenges and parented it with leadership. Upon reflection, a team member raised the concern that the duplicate use of the same word to describe a concept could lead to difficulties in analyzing coding results and crafting a clear narrative for data analysis. Through the resulting conversation, the team determined that the two uses of the term were very much in alignment with the intended use and decided to merge the two codes under the parent code of heritage leadership for the remainder of the coding process. Later consideration of the code challenges implied that it might be an integrating context that links multiple parent codes. Integrating contexts will be examined in more detail later in this work.

At the completion of the initial, focused review period the team resolved to continue the collaborative review of codes as an ongoing process throughout the research. A

shared channel for conversation had already been established using Slack, an online col-

laborative platform, and the consensus was to continue sharing thoughts and reflections

through this channel. This allowed for team members, working across varying schedules

and multiple time zones to keep a collective conversation going. A typical conversation

on Slack might look like this example:

> I thought I would help save us some time tonight and get the ball rolling
> on possible definitions for the words that are still needing them. These are
> only suggestions and I have not touched the terms in Dedoose. Here is a
> good starting point:
>
> Integrity - Evidence of choices possessing a high moral uprightness and
> demonstrated consistency though honest and ethical action.
>
> Use of Language - How word choice can convey a particular message or
> meaning, and depending on how language is used it can alter emotions,
> thoughts, and other outcomes during interpersonal communication…
>
> On another occasion a team member responded to an ongoing topic of discussion

with:

> Also, I've been bouncing around this idea of meaning making as a univer-
> sal. I don't think we are hearing it because normal people don't think in
> those terms. I think I am leaning toward meaning making being the equiv-
> alent of relevancy. Glancing through the memos, KM alludes to this in a
> memo.

This venue for sharing of thoughts and notes that each member was working on

individually gave the rest of the team insight into the mindset of their teammates and,

again, a chance to respond in a way that was efficient. Along with this collaborative

channel, each team member also kept individual notes and thoughts recorded using their

own preferred methods ranging from traditional notebooks, to dry erase boards, to rec-

orded thoughts in audio file format.

The final component of the ongoing memo taking process was a weekly, team meeting to discuss thoughts and progress for the week. These meetings were fairly loosely organized and served as a venue for sharing of thoughts, conversation, and debate. The team was, on occasion, joined by their advisor to share progress updates, answer questions, and offer insights or suggestions for ongoing analysis.

This collective work may have departed from a traditional memo writing process as described in grounded theory literature but the team remains convinced that this collaborative approach, which was both challenging and rewarding, led to a collection of codes and concepts that were robustly discussed and debated before inclusion in the master code list. Furthermore, this collaborative approach is in keeping with the concept of collaboration which emerged as a consistently cited concept in the research itself. This code list, in turn, allowed for deeper engagement with interviewee transcriptions as the team attempted to identify universal contexts that describe the work of heritage leaders.

Code Grouping

The process of grouping codes into related categories is an important step in the grounded theory process. A danger of grounded theory is that researchers may get so immersed in the open coding process that the lists of concepts and codes stray so far from the initial research question as to yield a list of codes so lengthy and broad as to be practically indecipherable. Determining when a substantial, if perhaps not exhaustive, list of codes has been developed is important to this process. Though not initially conscious of doing so, the research team departed slightly from a traditional approach to the code grouping process in order to mitigate this risk.

As described above, the early stages of coding work created a set of five parent codes to serve as a guide for the larger research work. These parent codes (Leadership, Heritage, Heritage Leadership, Meaning Making, and Social Emotional Competencies) represented the core concepts found in the guiding research questions. As the open coding process began, the research team engaged in parallel process of code grouping. Each new code was discussed in the context of the five guiding parent codes. Each child code was then associated with a parent. Over the following weeks and months of conversation, the research team made several decisions to merge or to reparent codes. The consolidation of the multiple uses of the term challenges is one example of this work. Critical reflection was also reparented associating it with self-awareness after a group discussion of the relationship between the two concepts.

Generalization

Generalization is not necessarily the aim of qualitative research. The strength of many qualitative studies is not their generalizability to broader populations but is, instead, the strength of a deep dive into the experiences and knowledge of the individuals sampled (Creswell, 2014). However, in a grounded theory study such as our work, there is a case to be made for generalization within the four interrelated properties of grounded theory described by Glaser & Strauss (2017) which state that the theory developed must closely fit everyday life experiences in which it will be used. It must also be understandable by individuals working with the field of the phenomena being studied so it can be easily and quickly applied. It must be general enough to apply to different situations within the same type of environment, and be "…flexible enough to be reformulated, virtually on the spot,

when it does not work in application" (Glaser & Strauss, 2017, p. 242). And lastly, it must allow the user the ability to control factors of the process so as to make it worth applying and able to continue to be applied as situational realities change over time.

Generalizations for this study include suggesting application of the findings to sustainability educators and interpreters working in formal and informal learning sites beyond those sampled in the study. Some of the generalizations are intentionally offered on the part of the research team and others occur organically in what Stake (1995) refers to as "naturalistic generalization" (p. 86).

Special care was taken when proposing generalizations about the applicability of the research findings outside the parameters of the conducted study. This included inferences of data being appropriate for other populations, environments or incorrect correlations to different time periods or cultures that do not mirror the original group of informants. One way to potentially address this is to target generalizability across people and situations and apply research findings to a sub-population of people in similar environments that differ only in slight situational factors (Kukull & Ganguli, 2012).

Reporting the Findings

The end product of this grounded theory study is proposed conceptual framework and a set of integrating contexts that explain the interactions between meaning making, SECs, and the processes of heritage leadership. We have also identified other factors related to the process of heritage leadership that suggest that there is ample material for ongoing, future research in this area. While Creswell (2014) implies that the inevitable re-

sult of a grounded theory approach is the development of a theory explaining the phe-

nomenon being studied, the development of a Theory of Heritage Leadership is beyond

the scope of this study. However, our exploration of this subject has led to the revelation

of abstractions and ideas that provide tantalizing views into the potential development of

a future theory of heritage leadership. The initial, proposed conceptual design suggested

an emphasis on the intersectionality of heritage and leadership, the process of meaning

making, and a framework of SECs that support the effectiveness of heritage leadership

work. The exploratory nature of this study has led us to a revision of the initial concep-

tual model. The revised model, discussed in Chapter 5, offers an even more nuanced un-

derstanding of the concepts revolving around, supporting, and advancing the work of her-

itage leadership and opens a window into future research in pursuit of a Theory of Herit-

age Leadership.

Chapter 4: Results of the Study

Introduction

In conducting research of this nature, acknowledgements must be made of the struggle with language. As it is with any new and emerging field of study, many of the concepts fundamental to the phenomenon under observation (i.e. leadership, heritage, interpretation, sustainability, etc.) are evolving. From the outset, experts invited to work with cohort members were able to vocalize challenges and necessary skills needed in their respective specialized fields, but were unable to express the who, what, when, how, and why of heritage leadership. This struggle with language was and will continue to be a constant companion for researchers engaged in heritage leadership study.

It is prudent to point out, the defining language associated with heritage leadership and related concepts was at times unclear and unwieldy even for the research team. Phase 1 research demonstrated a difficulty with language as interviewees continued grappling with unfamiliar terminology and struggled to make connections to their work. This issue revealed itself in the more than 400 codes generated in the Phase 1 coding process and contributed greatly to the motivation behind the pursuit of this research project.

Phase 2 research interviews attempted to adjust the research protocol to elicit clearer, more concise responses, but interviewees were likewise challenged. One interviewee described heritage as being "nebulous." That same description could be applied to all major concept areas involved in this study. Despite the adjustments to the research protocol, asking subject-matter-experts to articulate complex terms, in their own words, showcased a variability of language the team did not fully expect. It also revealed that even experts have an affinity for colloquial language and assumptions.

The challenges presented to the reviewers of the Phase 1 results, however, also revealed themselves as opportunities in the form of guidance for future research. The review of Phase 1 responses, challenges, and concepts revealed were directly informative to the restructured protocol and narrowed research questions that gave focus to this research study's goals and objectives.

Discussion of the results of Phase 1 led to a tantalizing view of what a more nuanced understanding or definition of heritage leadership might be. However, concerns were raised about recurring themes found when reviewing the transcripts of Phase 1 interviews. Many participants expressed complete unfamiliarity with the concept of heritage leadership, and several pushed back. One went as far as the describe the concept as "nonsensical" (MKW, personal communication, 2017). Other participants expressed confusion over the wording of questions and wondered what the intent of the research was.

Reflection on the responses of those critical of the Phase 1 research protocol led to a sense that Phase 1 had not really closed a chapter but had instead simply introduced the need to establish a definition for heritage leadership and a framework of the skills and abilities needed for heritage leaders to be effective. These results inspired the revision of the initial research protocol producing the more focused protocol which specifically examined concepts and skills related to leadership in heritage work.

Table 4

Significant Codes and Frequency of Appearance

Code	Use	Associated Quote(s)
Challenges	296	"any controversial issue is always a challenge in how you handle that delicately and with respect for all your audience members and yeah so that is a challenge" (Cable).
		"I don't want to speak towards the negatives, but I don't see a lot of leadership there, especially the environmental field. It's a shame that the environment, it's all political" (Langert)
		"I'm spending far too much of my time and energy on... what we all kind of euphemistically referred to as brushfires but you know the things that pop up that end up consuming a day or too much time out of the day and the next thing you know you're... The visionary, your visionary self is getting left behind or ignored." (McDowell)
Meaning Making	195	"We're at the emotional level. And then I would say probably it's also, from that point of view, it's taking the knowledge and connecting it to the place and to an emotional connection to whatever they're there talking about. That's probably for them the most powerful meaning making moment, is where somebody is connected in a really deep and visceral way, where it just comes together" (Cloud).
		"But I think the leaders who really do lead have followers who understand why they're doing what they're doing, and where it sits on that larger topography". (Orr)
		"When we talk about making meaning, I think that it's really important to connect with people about something that they care about, about a value that they hold." (Van Mourick)

Communication	145	"I think younger people need to know earlier on the best way to communicate and persuade and tell stories and build trust" (Langert).
		"I've had to, where I say something and it's obvious the person I'm speaking to is not connecting with what I'm saying. So, then I have to rephrase it, or I have to say it a different way, or I have to be very creative in that moment to try to use an example of something that they would understand to get my point across. I see myself doing that a lot." (Van Mourick)
Human Centric	129	"Even if you only understand the other side better, no matter which side of any issue you are on…that is a valuable thing. [...] I think it would build empathy. You know, I don't agree with these people, but I sort of get it where they are coming from" (Cable, 2017).
		"And so our job and heritage leadership is basically to try to figure out about those threats and how helping ourselves and others try and solve the problems addressed the various issues that all of the various scales to be able to get us towards a future where we do have those healthy biophysical systems in humans." (Mapp)
Understanding the term [HL]	108	"I think if you're talking general public, I don't think they understand heritage leadership" (Blythe).
		"I would say that, public service, which I would consider heritage leadership, is that it's a calling. And there is nothing on earth better. I mean it is, for me, it's how you give back, to, uh, your country, to your fellow citizens through your leadership and protection and stewardship of our heritage" (Jarvis).
Heritage	106	"Maybe heritage should be HEIR-itage. Instead of HERitage, that is to say all of those things that we as human beings, we as Americans, we as citizens of a community, family, city, county, state a

country in a world are heir to.... maybe that's what we're talking about. And that covers natural, it covers cultural, covers historic" (Gwaltney).

Hard Skills + Business Management Skills	98	"I wish now that I had learned earlier in my career that these topics really would make me better at my role. A great example is finance and budgets and everything that's associated- and HR type skills things. In reflection I wish I had more training in that" (Smerud). "So, I think the idea of understanding business, regardless of whether you're in a public, private, or an academic world, you're going to...you're going to need to understand that. And I think that's the biggest hole that I see, the training" (Basman).
Definition of Leadership	98	"I would say that meaning-making is very much a phrase that I would use to describe good leaders or guiding principles of good leaders, in that you're building shared vision, which is you're building meaning for all" (Smerud). "So, I used to say that leadership was something that you had or didn't have but now I see it more as a discipline. And it is a discipline that involves a tremendous amount of self-awareness and inventory knowing what you bring to the table" (Mapp).
Forward Thinking	98	"A part of what we do is to allow people to connect with their past so that this will allow a future to happen. That is a very important component of our daily activities, that we be really talking about the past, the present, and the future and link them all together and then run a thread through all of them" (Basman).

Relevancy	98	"Well, how is this relevant to me? Why is it important? Why should I stop and read this or take this course, or take this tour? Is there something that triggers an interest in me because it is something I care about? Or is it something I want to learn more about?" (Van Mourik, 2019).
Perspective Taking	95	"It's the act of- of bringing together really serious discussions and the participation of different cultural groups interwoven with natural and human constructs, both in modern society but also historical perspectives and understanding the interrelationships between them" (Smerud)
Situational + Pragmatic	94	"So, I think my point is, it depends on the circumstances. I mean sometimes you have to lead a charge, sometimes you have to evoke, sometimes you have to encourage, sometimes you have to discipline" (Orr). "I try and be very inclusive in the process ...but in the end I'm not afraid of saying... OK thanks for all your input. This is what we're going to do" (Amy Lethbridge).
Self Awareness	91	"...that self-awareness piece is what really rewards you" (Smerud).
Empathy	85	"I think it takes empathy, you know, and respect" (Cable, 2017).
Consensus Building	78	But I think if you can you can work on ways to be able to truly understand what it is that others care about and what their concerns are and how they think about a particular issue. (Simmons)
Problem- Solving & Solutions	78	"So, heritage leaders potentially have a way to become bridge builders between communities and the problems they face to the resources that could help those communities solve their problems" (Mapp).

Participant Definition	76	"I would say, historical background, cultural background. I suppose it could lap over into the, into the natural resources" (Gidner).
Meaningful Experiences	73	"You can have a volunteer...give out awesome information, but if they're not making it relevant and meaningful for the individual...it doesn't drive action" (Rach).
Passion	71	"What's your passion? What's your unique contribution? And how does that fit with contributing to taking responsibility for the difference you make?" (Cloud).
Mission Driven	69	"...keep your mission first and foremost in your mind, and to bring everybody back to that common goal any way that you can" (Rach).
Tenacity+ Resilience	69	"part of what I think makes a leader is just sheer stamina. As somebody once put it to me, as being too damn dumb to know where you're beat. And I think that there's something too that. It's just know that you're right, or having an intuition, of being stubborn. Stubborn can also be a failure. I mean, it can also be something that it's a bad thing. But I think the one thing to acquire a certain level of just quiet stamina that keeps you at it. Keeps you on a job a little bit later at night and gets you there a little earlier in the morning." (Orr).
Listening	63	"There's just the challenge of the ability to listen. Which I think can be really difficult for people. And certainly, I've been challenged with that too. I think the older I get, the better I am at listening. But really listening to understand, that's a real skill that one needs to develop." (Van Mourik).

Collaboration	57	"You know, all these organizations are somewhat doing it in isolation and I think there needs to be a lot more collaboration amongst all of these organizations and engagement with my generation in the process, so that we, we can at least impart some of our experiences, and— and help and mentor where appropriate, but also feel ready to let go." (Jarvis).
Serving	55	"I believe someone who is a leader seeks to raise others up, and it's not about me, but it's about us. And looks for ways to promote individuals and empower individuals, again, so that we're all moving towards that future state, whatever it may be…" (Van Mourick)
Moral Standards + Integrity+ Trust	54	"It was the person, male, female, or kid, or whatever, whatever age group, that did something that needed to be done and got no particular credit for it. They did it because it needed to be done, not because it moves their career needle forward" (Orr).
Connection to Place	52	"I fear for the future, if we don't take the time to understand why these places are valuable and then help people to connect to them" (Blythe).
Worth+ Valuation	52	"I think the biggest barrier in my line of work is resources, and that's across the board it doesn't matter where you work, what type of heritage organizations you work within, it's its lack of resources but also a lack of people understanding the value of service" (Rach).
Conflict Management	50	"[in regard to challenges] ...Not knowing how to do conflict resolution, not knowing how to be civil discourse" (Rowe).
Participation	49	"...you're always working on inclusive participation and shared decision making" (Cloud).

Critical Reflection	49	"The idea of doing introspective work is not new to me but how I've prioritized introspective work in the past ten years, I wish it had been more of a priority previously" (Zahniser).
Cultural Awareness	43	"There's not anything inherent in those choices that's better, they were choices made for reasons that are cultural. So, my point here is that I think it's essential, whatever the field, whatever the profession, whatever the discipline to understand those choices that we made" (Orr).
Systems Thinking	43	"You have to have the skills to think in terms of systems and find the leverage points for changing those systems, because we can't get the sustainable development with just individual change, we also have to do systems change." (Rowe).
Change Management	40	"I think a leader is an effective change agent, and we looked at what are the competencies that leaders need in order to be effective change agents across countries" (Rowe).
Fortuitous Accident	40	"So, I never in a million years thought I would work in volunteer services, and most volunteer services staff don't ever plan to work in volunteer services, it just kind of happened" (Rach).
Risk	42	"Stepping off a curb is not the same as jumping off a cliff, so sometimes, the point there is, sometimes take a risk. And the people that we know that took risks, were sitting in the back of a bus in Montgomery, Alabama, you know, refusing to move— sitting in the front of the bus and refusing to move, you know that was a risk. Being willing to stand up for an idea, that's a risk. And sometimes you get shot, sometimes you lose your job, sometimes ... But that's the price you pay for leadership. It's the willingness to take certain risks. With your career, with your reputation, with your money, with your life and so forth" (Orr).

Inclusivity	36	"I think it has to do with leading from love, empathy, and compassion, inclusivity. (Mapp).
Agility	33	"the other thing is to be versatile" (Madison).
Responsibility	32	"When you hold onto the space for very very big concerns, issues, community. You know you feel the weight of that, the responsibility of that. And you know if you allow yourself you can be overwhelmed by that" (Mapp).
Strategic Thinking	25	"[Leadership] has to be practical and persistent. And I'm a big one for logic and needs to be logical it needs to be planned needs to be thought through" (Simmons).
Mentoring	24	"And then we've been really talking a lot about mentoring and I think we do a great job at mentoring in the field with field skills, but we don't necessarily put the same emphasis on mentoring for leadership" (Lethbridge).
Creativity	23	"…so, if you have a creative leader, uh, leading creative people, there— there undoubtedly will be— failures. But those are— those almost can be celebrated in a way" (Cable).
Boundary Spanning	22	"Don't just read stuff in your field" (Orr). "And a lot of what got lost in the process is really having the ability to have a horizontal understanding of what's happening in other facets of society" (McDowell).
Vulnerability	15	"We need, again, to be willing to be vulnerable, so maybe it doesn't surprise me that I identify that as a trait that I have, and I think it's important. And maybe what also fits within vulnerability, is a willingness to admit when we're wrong." (Jacobs).

Self Management	15	"I would say [a leader] has a very, very high E.I., emotional intelligence. Understands their own strengths and weaknesses and is able to compensate with that with having the right team in place to work with them" (Van Mourik).
Language Use	14	"Sometimes I think we overcomplicate things just because we kind of like to hear ourselves talk. We need cultural competency we need, sometimes linguistic competency and we don't always have that" (Gwaltney).
Coaching	13	"I would really latch onto the word 'coaching'" (Cable, 2018).
Self-care	12	"That self-care, I think, is a really important part of well, number one, the sustainability journey, but also I think for me has been a really important aspect of my own leadership and in setting the tone for the organization as executive director" (Zahniser).
Behavior Modification	12	"The dispositions piece that you need to be attuned to your own disposition - you know, self-efficacy" (Simmons).

Results

Examination of the codes and aligned groups of codes revealed four distinct approaches to characterizing codes and their alignment with the research questions. The first grouping were codes that appeared frequently in the analysis of the data but were categorized as less pertinent to this research. An example of this is the concept of challenges. The code was utilized frequently but, on closer examination, really focuses on undercurrent issues that face leaders in all areas of work. Namely, the need to address problems and issues that challenge their profession internally and externally. In essence, leadership is all about facing and dealing with challenges. The research team identified this

frequently used code as being a simple recognition of the ground rules for all leadership and not specifically pertinent to heritage leadership alone. The other factors that heritage leaders apply to these challenges specifically in heritage work are more pertinent to this study and will be discussed in detail below. The second grouping were codes that were frequently used and were seen as being specifically pertinent to the work of heritage leadership. The code meaning making appeared extensively in the analysis of transcripts and is indicative of something specific to heritage work, I, fact it may be one of the most significant finding of this study. An extensive discussion of this concept and its role in heritage leadership follows. The third grouping were codes that, while initially identified as separate codes and not appearing with great frequency, grouped together in a natural manner and collectively represented a significant frequency of use. For example, hard skills and business skills were initially treated as separate codes but, were later identified as closely aligned and the combined code grouping appeared with great frequency in the analysis. The fourth and final grouping of codes were those that, while appearing with less frequency, were used in such a way as to indicate to the research team that interviewees placed very high importance on these concepts in their work. For example, strategic thinking, vulnerability, and self-care did not appear frequently but, when they did, their utilization indicated that the interviewees regarded the application of these concepts in their work to be of critical importance to their work. Additionally, a few codes were used very infrequently, did not group with others, and did not indicate a significant addition to the research. These codes were dropped from the results discussion but can be found in Appendix F. The discussions below will further illuminate and illustrate the importance of these groupings to the work of heritage leaders.

Heritage

Finding Statement: Heritage is those tangible and intangible things that we inherit from those who came before us and that we have the responsibility to pass down to future generations.

One significant finding from our study indicated that **Heritage Leaders Define the Concept of Heritage Differently**. Cable shared one aspect of the complexity surrounding finding one way to define this term when he shared, "Defining heritage is actually—I find difficult. And it's actually controversial. I know some people —I've read some articles where they just hate —people hate that term because it is so, you know, nebulous" (Ted Cable, Personal Communication, November 2018). This was anticipated based on the original literature review in chapter 3 and was reinforced by the interviewees through both their hesitation in defining the term and the variations of answers offered. Many interviewees gravitated towards the term pertaining to the tangible and intangible aspects of the past, while others shared explanations for how they use this connection to the past to inform decisions for the future. An expanded explanation of this latter aspect will be shared in the section on social emotional competencies around the mindset of forward thinking.

When heritage is viewed as an approach to accomplish particular goals the implications for employing meaning making became evident and as mentioned earlier this concept will be expanded on in more depth in the section on meaning making and aspirations. To this point on meaning making it is noteworthy to point out that some participants even indicated that the term itself may mean different things to different people

within a global setting. Lethbridge points out, "I think in the U.S. we tend to think of her-

itage more related to history and culture. I think in—I don't know about the whole inter-

national community, but certainly in Europe heritage is a more encompassing term"

(Amy Lethbridge, Personal Communication, January 2019). This last aspect of cross-cul-

tural use is beyond the scope of this study but illustrates the journey still ahead to under-

stand this term more definitely.

Heritage Leadership and Leadership

      Finding Statement: Altruistic aspirations inspire heritage leaders to foster mean-

ingful connections in order to preserve and protect our shared natural, cultural, and social

heritage through the contextual application of meaning making and social emotional

competencies.

      One of the most significant findings of this study is the definition for Heritage

Leadership offered in this finding statement. As discussed previously and throughout this

document, the lack of a coherent definition for Heritage Leadership is a challenge that

has plagued the UMSL cohort, the 2017 Phase 1 interviews, and the interviews conducted

for this study. The lack of a coherent definition of heritage leadership could be seen as an

indication that heritage leadership is not actually a legitimate field of study. At times,

during this work, the research team worried that the creation of a definition of heritage

leadership might be an unachievable goal of this project and would end up relegated to an

unfulfilled, suggestion for follow-up research to this study. Results of the interviews pro-

vided a far richer answer to this question than anyone on the team had anticipated.

The existence of academic programs focused on heritage leadership at UMSL and other institutions assumes that heritage leadership is a definable discipline but, as yet, a definition of the field has been elusive. Responses from individuals interviewed for this study suggest that the field is in its infancy and needs ongoing foundational work such as establishing the baseline definition above. Interviewing leaders in heritage work and gathering their thoughts on leadership as it pertains to work in heritage related fields led to this definition of heritage leadership.

Getting to this definition required a multi-pronged approach to questioning to gather the results needed to form a definition. Direct questioning of interviewees about the term heritage leadership led to a mixed bag of responses. Interviewee responses fell into one of four categories: no knowledge and fundamentally opposed, no knowledge, some familiarity and can't define, familiar and can define, with some individuals describing familiarity with the term while others found little to no connection with the concept. Interviewee responses ranged from:

> Well, I love it as a concept and I think it is evolving in both definition and practice... I am watching what is happening both in the United States and internationally in the realm of heritage leadership, including heritage interpretation and advocacy and it is becoming more recognized. I think it's a term that needs to be better understood and embraced. It's a concept that needs to be better understood and embraced. But I liked the way it, sort of, encapsulates where I see the profession moving. The direction it's going in. I just don't know that we're all calling it the same thing (Lethbridge).

to:

> "I've heard of it and I've heard of it only recently, but I really don't know. If anyone asked me to define it, I don't have a concise definition. I'd tell them, well I think it means- Leadership over time that begins to construct a culture, thereby a heritage. I don't really know all that much about it. But I have heard of the term" (Smerud).

to:

> You know, I'm not entirely sure. And you and I talked about this a little bit, but that is, you know, a new term for me. I have not heard that reference before. So, I'm not sure that I have a real clear picture of what I think that would mean (Preis).

to another who challenged the concept as "nonsensical" asserting "…there are strong words of heritage and, I believe, there is strong elements of leadership, but when you combine them they don't make any sense to me in a practical sense" (MKW, Personal Communication, July 2017). Of those interviewed, most individuals working in EfS identified little to no familiarity with the term while individuals working in HIn were more likely to have heard of the concept.

As analysis of the responses commenced, the research team frequently engaged in discussions of whether the goal of establishing a baseline definition for heritage leadership was even achievable within the scope of this study. Team members expressed concern that, perhaps, we had bitten off more than we could chew and that this goal of our research might need to be set aside.

If questioning of heritage leaders had simply ended with asking the interviewees to define heritage leadership, this might well have been the case. However, the intent of this work was to go deeper into a review of the thoughts on leadership expressed by the interviewees and tease out the structure of the work they do in search of a framework of common abilities and actions that heritage leaders apply to their work. A description of this framework would then provide a basis for a definition of heritage leaders that these leaders themselves lacked.

Questioning on the term leadership itself resulted in the collection of data that allowed the team to build a picture of what effective leadership looks like to a person en-

gaged in heritage related work. Ergo, if you ask identified leaders in heritage work to define leadership as it pertains to their work and the work of their peers, the results provide a framework with which to build the elusive definition we sought. Many of the interviewees offered definitions of leadership that might have been found in any number of books or articles pertaining to leadership but, as discussions around their own leadership work and the work of others commenced, additional concepts arose that pertain specifically to the work of heritage leaders. In the sections below, we'll unpack the concepts represented within the definition above and identify their connections to the concepts that leaders identified as critical to the success of their leadership work.

The term 'meaningful connections' in the definition refers to a grouping of several concepts that emerged as codes during review of the transcripts, namely meaning making, consensus building, and boundary spanning. Meaning making's role in the heritage leadership process and its status as an integrating context across all aspects of heritage leadership will be discussed in much greater detail below. For our purposes here, it is important simply to note that the concept of meaning making arose throughout descriptions of effective leadership. Consensus building and boundary spanning appeared over 100 times in the transcripts. These two concepts, while differing slightly in their definitions in our coding structure, are aligned with the concept of meaningful connections. These concepts arose in most interviews as key to successful leadership and again, when one considers the work of heritage leaders, it isn't particularly surprising to find this thought. As an example, heritage leaders around the world are currently engaged in work related to the impacts and effects of climate change. Work of this nature requires the building of consensus and connection to the issue between disparate social and political

viewpoints and the ability to span boundaries between viewpoints is key to building con-

sensus.

The concept that Heritage Leadership is Context Driven, or situational in nature is

also related to boundary spanning and consensus building as discussed above. As also

noted in sections above, the research team initially explored the possibility that leaders in

heritage work would identify particular styles of leadership that they applied most fre-

quently in their work. However, the opposite was found to be true. Universally, partici-

pants shared that even if they happen to have a personal preference for one style of lead-

ership, their work required them to be flexible, aware of circumstance, and to apply dif-

ferent leadership styles as needed. Heritage leaders identified a need to flex their leader-

ship styles both internally and externally. Interviewees discussed that working with dif-

fering individuals within their own organizations and within the target audiences of their

organizational efforts was a necessary ability. Interestingly, however, was a pragmatic

viewpoint embedded in the contextual leadership style identified above. Interviewees

noted that they might find one style preferential but that the nature of their work required

them to adopt other styles in order to address areas of personal responsibility or responsi-

bility to their employers. As one interviewee summed it up, "I'm collaborating and shar-

ing that leadership. Ultimately though I'm still the who has to make the final decisions"

(Jacobs). Although seemingly at odds with one another, this view of leadership as both

pragmatic and situational was found throughout the transcripts and leads to the conclu-

sion that leadership in heritage has to be informed as to when it is possible to flex to meet

the needs of a group but also when a rapid and individualistic approach is needed.

The majority of interviewees described their preferred leadership style as aligning with the concept of servant leadership. This concept of leadership as an act of serving emerged strongly from the data and led to our conclusion that a mindset of serving others is key to successful leadership. The concept of servant leadership was raised equally by interviewees working in HIn and those working in EfS. Closely aligned with the idea of servant leadership is the concept that Heritage Leaders are Mission Driven. This reflects the concept that expectations of the professional roles held by our interviewees merge with the personal passion each of them felt for their work and the organizational missions they strive to fulfill. Interviewees shared a feeling of deep connection and responsibility to their respective missions as Jarvis indicates,

> You have a responsibility to those individuals, to cultures, to the other voices out there, to care for that idea and resource and to steward it. [...] when you're a heritage leader, you have that responsibility on your shoulders, not just to carry the place but to use it, to use it to help society achieve its higher purposes (Jarvis).

On reflection, it is not surprising that this is a key aspect of heritage leaders' worldview. This group of professions is focused on the understanding, preservation, restoration, and protection of humanity's shared natural and cultural heritage. It follows naturally that individuals working in these areas would adopt an attitude of service to others based initially on their commitment to working in heritage and that later informs their relationship with those they lead.

It is important to point out altruism, intention, and forward thinking are fundamental to the definition of heritage leadership. Many individuals and organizations work to educate, preserve, and care for our collective heritage; however, intention ultimately

determines who is and is not a heritage leader. Heritage leaders serve in specific capacities because they have a selfless desire to care for our collective inheritance. Entities that operate under for-profit models lack this altruism. Their intention is to earn a profit, which arguably may lead to the care and preservation of heritage resources but is not the fundamental desire of that organization. The care and preservation they provide is for immediate consumption, namely their bottom line, not for the benefit of future generations. As such, they may exhibit heritage leadership characteristics and exercise the necessary skillsets but not fully embody the definition of heritage leader.

Interviewees also stated quite clearly an agreement that leadership requires the application of both hard skills and soft skills. An in-depth discussion of the key skills identified can be found below but it is key to a definition of Heritage Leadership to recognize that both types of skills are viewed as critical to the work. The research team imagined, at the beginning of this work, that interviewees would identify a need for the use of soft skills or Social Emotional Competencies, over a need for training in the more traditional, management-focused hard skills or competences. This was not the case. The findings indicate an equal need for leaders to effectively apply traditional hard skills or business skills (data analysis, budgeting, HR regulations, policy management, etc.) with an ability to wield soft skills or SECs in their work.

SECs will be discussed in greater detail below, but it is important to recognize that competencies related to forward thinking and human centric abilities arose frequently in descriptions of effective leadership. This is also not particularly surprising as the very basis of heritage work is in relation to humans and their relationship to shared connections to natural and cultural heritage. While natural systems would exist with or without a

human presence, viewing natural systems as heritage requires a connection to humanity

to offer context. Cultural and historical heritage, on the other hand, is completely an arti-

fact of humanity. Forward thinking also emerged as concept important to heritage leader-

ship. Mark Madison described it as "an attempt to use our history both to learn from past

mistakes and to inspire folks to carry our future work." Again, this concept will be dis-

cussed in greater detail below, but it is important to consider how it arose in relation to

leadership. Interviewees frequently referred to their understanding of heritage as some-

thing from the past. They discussed family background, religion, ethnicity, historic sites,

and other examples of things passed on from the past. Several even went so far as to say

that heritage belonged firmly in the context of things past. As results were coded, how-

ever, an interesting concept emerged as these discussions of preserving heritage past were

examined. An assumption of all these discussions was that the heritage was being pre-

served 'for' someone. Future generations, family, community, and others were all men-

tioned as being recipients of preserved heritage. This view assumes a forward-thinking

orientation to heritage leadership as it is impossible to consider preserving heritage for

future generations without adopting a future focused orientation.

Pursuing outcomes related to fostering understanding, protecting, and preserving

shared natural and cultural heritage was identified as an anticipated outcome of the herit-

age leadership process. In support of this desire, problem solving and challenges emerged

as critical abilities in a leader's portfolio with, again, an almost universal appearance in

interview transcripts. Again, reflection on this concept reveals these as likely candidates

given the nature of heritage work. Heritage leaders are engaged in varied activities related

to our shared natural and cultural heritage, but common to all of this work is that it seeks

to address problems related to threats to heritage sites, social change, lack of resources, etc. All of these present themselves as problems and challenges to be solved or overcome and heritage leaders must possess strong, problem solving skills if they are to be effective in their work.

These factors are the vehicles through which leadership is carried out. There are other factors at work in the process that describe the who and the what of leadership work in heritage. Focusing on why and how leaders work and through what means they accomplish their goals is crucial to our understanding of the work and the needs of the profession.

Meaning Making

Finding Statement: Heritage leaders use Meaning Making to create emotional connections to heritage.

The importance of meaning making and its function in the heritage leadership process is revealed in a multitude of forms and the nature of meaning making as a concept that links all the aspects of heritage leadership cannot be understated. Sub-codes assigned to this concept only hinted at the broader display of meaning making as indicated by participants. Its influence was articulated in everything from an interviewee's reasoning for entering their respective professional fields to their use of meaning making to accomplish their goals and organizational missions. In exploring how meaning making related to the work of interpretation, Emily Jacobs responded, "Well, that is our profession." In fact, asking heritage leaders about their use of meaning making equated to reminding a fish that water is all around it. For them, the practice of meaning making is an

unconscious one. Many interviewees shared that they may not have used the term Meaning Making, but that was, in fact, what they were doing as they engage in the passionate work of building emotional connections.

While the concept of emotional connection was not one directly coded for, meaning making and emotional connection appeared as co-occurring concepts throughout multiple interviews. The tie between meaning making and emotional connection was articulated as a sense that people do not care about what they do not understand or identify with personally. Facilitating this emotional connection through meaning making was an important step. When asked to characterize this process, Tammy Rach offered that building emotional connections was synonymous with "meeting each person where they are."

This idea of meaning making producing an emotional connection was further linked with sub-codes Connection to Place, Meaningful Experiences, Empathy, Passion, Relevancy, and Participation. Consistent with Frisk and Larson's work on transformative action and Hungerford and Volk's (1990) work on environmental learner behaviors, emotional connection functioned as a sort of link between meaning making and participation. In HIn, interviewees differentiated between "fact spew" (Rach) and relevant, meaningful information. In EfS, interviewees shared that personal meaning was the "heart" (Langert) of behavioral change. In essence, people do not change unless it is meaningful and valued.

Making meaning is fundamental to accomplishing the work of heritage leadership. This sentiment was illustrated clearly. Aspects of meaning making, valuation, and spark to action, were viewed as tools used by leadership to accomplish organizational goals or achieve mission. Meaning making specifically was seen as desired outcome or

an accomplishment of the mission, the importance of which could not be understated. In one response from Lethbridge, she shared, "I would say especially in our field, I think meaning making is really important. I don't know how you do this work without that being a piece of it." This statement implied that heritage leaders see themselves as tools that work in tandem with meaning making to foster relevancy within their internal audiences mixing the use of known techniques with possession and utilization of strong social emotional competencies. This process only works, however, when paired with respect and an understanding of the audience. Then, and only then, can influence be exercised and relevancy generated. Cable shared the first step, "I guess that's a skill. It's an attribute—to read the audience in that way, in terms of helping them, helping you understand what might be meaningful" (Cable).

Social Emotional Competencies

Finding Statement: Social Emotional Competencies are the attributes, skills and abilities heritage leaders wield as they engage in meaning making and developing personal leadership in themselves and others.

Many skills and competencies were identified by our participants as important to the process of heritage leadership. The development of these social emotional competencies ties to our ability

> "to acquire and effectively apply knowledge, attitudes, skills, that are necessary to understand and manage emotions, set and achieve positive goals…feel and show empathy for others, establish and maintain positive relationships and make responsible decisions" (Smerud).

Interviewees articulated these social emotional competencies as individual concepts, interdependent concepts, and colloquially as soft skills. Langert commented:

> "When I look at the term 'soft skills' that kind of gets me mad to see that term because […] they're not soft skills, but they're labeled as that, you know, I think. The ability to relate, develop trust, you know, to be a great communicator to be empathetic to a very high degree to be a fan phenomenal listener. To be a convener and a collaborator […] This all adds up to skills of being able to influence people." (Langert).

The general consensus among interviewees was that soft skills were anything but soft. It takes time and intentional development to master many social emotional competencies. Yet, certain skills may still exist beyond any leader's ability to develop in themselves which speaks to attributes innately held, difficult to develop, and, essentially "unteachable" (Cable). While some skills may be inherent, like all things there are people who are naturally inclined to leadership and others, "that weren't born with the skills but have become great leaders because they work at it" (Jarvis).

The mention of empathy, a willingness to understand things from the viewpoint of another person, marks the emergence of the first competency-related finding, that **Heritage Leaders "Think Differently."** In saying this, the research team does not intend to suggest that no one else thinks in the manner that heritage leaders think. There are, without question, others who utilize similar styles of thinking in the pursuit of their work. However, the research team does intend to assert that our data supports the notion that heritage leaders apply a different type of thinking to their work than has traditionally occurred in the past. This type of 'different thinking' is critical to the creation of long term, sustainable solutions to the difficult questions and issues that heritage leaders encounter and engage. Traditional approaches to these problems have not yielded lasting solutions so the application of 'different thinking' is required.

Interviewees suggested that feeling and showing empathy takes some intention on the part of the heritage leader engaged this competency. Amy Lethbridge expresses, "Empathy— patience—You know, it really does take purposeful thoughtful work" (Lethbridge).

Whether SECs are innate or developed over time, heritage leaders share definitive abilities. To borrow from EfS, heritage leaders "think differently" (Cloud, 2016). They are capable of breaking cycles, or not doing what has always been done, through critical reflection and systems thinking. Jaimie Cloud expounds on systems thinking as a way of thinking differently and holding dichotomies when explaining it in the context of heritage:

> Preservation and transformation. So, it's both. That's the thing. Preservation and change because just holding on to something - You know, life - Systems change or they die. So life is always changing. So especially if you're if you're trying to do a mash up between ecosystems and the living systems, the natural systems, and human and cultural systems, they're dynamic and they're alive. So just hanging on to something doesn't necessarily mean that it will be living forward. That's not heritage. Preservation and transformation and knowing when to do what. For me, that's what it is (Cloud).

Heritage leaders clearly exercise this ability to take alternative, or even multiple, perspectives. They view decision making and outcomes through differing points of view, often with the intent of trying to represent the underrepresented.

They express empathy and the ability to be human centric, or to understand and acknowledge our human nature and needs indicating that **Heritage Leaders are People Oriented**. Orr articulated it best stating,

> "I think what it boils down to is some kind of human competence. And the word, and you've got the word empathy here in this list. I think that's a pretty good word for this trait. But basically, people who like people." (Orr)

Interviewees noted that leaders took a human-centric approach when considering how best to support individuals and groups in the achievement of desired results and accomplishing goals for the organization. It is important to note that researchers acknowledge this approach to include paying attention to our human nature and the needs of others and did not refer to an anthropocentric perspective, in where humans are determined to be the most important universal entity. Simply put, heritage leaders like people and kept them in mind when making decisions which is a skill born out of respect and attempts to "understand why they believe the way they believe" (Cable).

A similar example of interdependent coding was observed with communication. Interviewees articulated, time and again, that listening was a major part of good communication and was a major component to meaningfully connecting with others. Mapp (2017) supported this by sharing that connecting interpersonally is, "the ability to not just share communication out, but to be able to take in information and metabolize that information…people can talk and talk and talk, but the listening piece I think is more important."

Listening provides opportunities to become aware of alternate ways of thinking that address the concerns and desires of others in the decision-making process of obtaining organizational goals. This is reinforced by perspective taking which includes the ability to learn from others as well as fostering a sense of empathy. Perspective taking was further connected to inclusivity, by identify mental and emotional barriers in both internal and external stakeholders. As a result, **Heritage Leaders are Inclusive.** Mindfulness of others and active inclusion of the voices of underrepresented groups, or those most affected by organizational decision making, were examples cited on multiple occasions.

Bill Gwaltney illustrated that heritage leaders need to remain ever mindful of potential

barriers when addressing organizational operations and identifying concerns, "under-

standing the societal, the cultural, the linguistic, the emotional barriers that people have,

is probably the single most important task".

As heritage leaders, an important aspect of accomplishing organizational goals

through a mindful approach of perspective taking includes exploring heritage itself

through the lens of time to understand how perspectives, perceptions, and practices may

have shifted and what the best way to proceed into the future may entail. A prominent

theme throughout the interviews was that, Heritage Leaders Benefit from Connecting the

Past to the Future. Bringing past knowledge forward in a way that uses the present to see

what is possible for the future is a mindset shared by heritage leaders. They approach the

forward steps in different ways, with different organizational goals, but each heritage-

minded goal includes an element of learning from the past to work towards ascribed im-

provements, or what HIn likes to term the application of "lessons learned" (Ham, 2016;

Tilden, 2009). The use of the term forward thinking often presented itself in interviews

from the field of EfS, but all interviewees mirrored the idea noting the future thinking vi-

sion of the preservation of resources is what all heritage leadership strives to accomplish.

Jaimie Cloud (2019) illustrates the applicability of this overlap in thought,

> And I think, for me, it's always about the past and the future. So, you
> know, why are we connecting to the past if not to invent the future? But if
> you're just connecting to the past and you don't have an eye to the future,
> we will get what we've already got.

Examining the past allows for contemporary decision making such that future

preservation goals can be better accomplished. With all the resources entrusted to the cur-

rent generation, forward thinking heritage leaders seek to develop ongoing relevance

within individuals and develop and execute preservation strategies that allow resources, places, and concepts to endure over time. This forward-thinking mindset involves generating meaning and relevancy for stakeholders as part of how that preservation get supported. Cable share as an example, "I would like to think that our primary job as heritage leaders again is to get people to fall in love with the resource and then they'll take care of it, whatever that resource happens to be" (Cable).

Much of how this is accomplished includes being mindful of both the task and relational aspects of heritage leadership as it relates to planning and project coordination. Heritage Leaders (Strive to) Navigate Processes Effectively and Gracefully. First and foremost, heritage leaders are problem-solvers. Not only do they get the job done but they also often do so in innovative ways, circumventing challenges through the exploration of cause and effect and alternative possibilities. Beyond managing the daily tasks and dealing with the everyday crises, heritage leaders must be able to identify strategies for moving forward, and thus Strategic Thinking is an important way in which they must think differently. Strategic Thinking, as a code, was used to indicate the ways in which heritage leaders find and develop unique opportunities to create value by enabling a provocative and creative dialogue among people who can affect an organization's direction. Or as Bora Simmons (2017) puts it, "being able to plan, being able to see the steps and the various roads that need to be taken to get to that vision." This logistical ability is what enables the heritage leader to see the path for moving forward past eventual challenges and barriers toward their vision and mission. The ability to understand of a system by examining the linkages and interactions between the elements that comprise the whole was identified as a critical skill by interviewees. This was brought up more frequently by

those in the field of EfS, which has long stressed the importance of analyzing problem constellations by way of whole systems, ascertaining inter-relationships, multiple perspectives, and boundary exploration.

As they Problem Solve, heritage leaders must rely on certain competencies to pilot through uncertainty. This includes serving as a guide through the disruption and unease that often accompanies shifts in patterns or Change Management. It also includes serving as a channel toward positive outcomes when disagreements and controversies arise, or Conflict Management. Underlying the closely related conflict management and change management processes, the process of Self-Management lies, and there, beneath the surface, we see heritage leaders recognizing their own role, taking responsibility for their actions, and striving to do their best.

Heritage Leaders Take Responsibility and follow through. Heritage leaders have a moral standard as they approach accomplishing their organizational missions. They have integrity. They learn, form, and own up to mistakes. They care for the people they encounter in their work and in the community. Responsibility, and all it encompasses with interpersonal dealings, exemplifies the protecting resources inherited from the past and looking for ways to care for these tangible and intangible resources for generations to come. "Effective heritage leadership [...] is an attempt to use our history both to learn from past mistakes and to inspire folks to carry our future work" (Madison). There is a sense of duty expressed by heritage leaders toward people, places, and concepts that requires a boldness to embrace and actuate needed change, as well as the ability to maintain an openness to examining mistakes made along the way.

Responsibility correlated with a heritage leader's Willingness to Stretch Their Comfort Zone. Interviewees shared a willingness to choose discomfort as they stood up for their personal values or the values of the organizations they represented. This approach presented opportunities to engage in risk-taking actions with the aim to drive organizational change or a new level of awareness around an environmental concern or important social issue. One interviewee offered, "If you're not willing to take a risk, then you just aren't going to be willing to lead" (Orr), and as another stated, "risk and greatness are tightly linked... and they don't come through working a landscape of safe choices all the time" (Smerud).

To this note, the risk-taking mindset held by heritage leaders, as it appeared in the data, influences the ability to innovate and generate needed changes to support personal or organizational aspirations, however further research would be necessary to explore the depths around this mindset.

Reflecting and spending time comparing the intended outcome to the actual outcome, is an important component of problem solving and risk analysis. Critical Reflection was used to describe this capacity. Intertwined with the ability and willingness to "think differently" using Systems Thinking, which involves the ability to hold the tension of paradox without resolving it too quickly, Critical Reflection is the physical skill and manifestation of that tension and the need to spend time sitting in discomfort. Heritage leaders carry this tension linking thinking, behavior, and outcomes, or as Cloud illustrated, "if you don't link your thinking to your behavior and track the results of that different behavior, then it doesn't make any difference." Only after spending time in critical

reflection and perhaps as a result of the emotional aftermath of risk taking, heritage leaders recognize the need to embark on other processes, such as Behavior Modification and Self-Care.

While the scope of this research didn't include an exploration of the 'hard skills' or business skills identified by those informants of the interview process, it is worth noting that several interviewees identified a solid understanding of these skills as being key to the success of their work as leaders. Peter Smerud, Amy Lethbridge, and Cem Basman all spoke at length about these as an area of importance to their work. Other interviewees echoed the importance of this type of 'hard skill' development. However, most of these examples arose in reference to work being done in relation to positions of authority over staff or budgets. It might be possible to generalize that these concepts are more important when one's leadership work emanates from a place of positional authority that requires attention to the healthy functioning of staffing, boards, policies, and budgets; however, that work is beyond the scope of this paper.

Concept to Construct

Throughout the course of this research, we found ourselves frequently discussing how the identified conceptual areas intertwined. The five parent codes (heritage, leadership, heritage leadership, meaning making, and social emotional competencies) were initially established by adopting key terms that emerged from the earlier UMSL Heritage Leadership cohort interview project and coursework pursued by the cohort in preparation for the research phase of the program. However as new ideas and concepts emerged during data analysis, the amount of crossover that occurred between the initial five parent

codes demonstrated to us that this model was insufficient to describe the heritage leadership phenomenon.

From the outset, we theorized that meaning making processes played an influential role within heritage leadership. The resulting data confirmed our suspicion, however, meaning making was used by interviewees in a variety of ways. Most, if not all, the interviewees described their own meaningful connections to the areas of heritage in which they work. While not all of them used the term meaning making to describe that personal connection to their areas of work, the terminology used was, universally in line with the definition of meaning making. Further, as interviewees described the work they do, they consistently stated that their work was intended to forge emotional connections to cultural, social, or natural heritage in a way that is unmistakably meaning making. Finally, interviewees were also united in describing their desire for positive engagement and participation as goals, or aspirations. It was not enough to aspire to these things, however. The intentional building of emotional connections to inspire and evoke meaning that leads others to understand, engage, and participate required the exercising of particular skill sets and mindsets. In short, something else was in play.

The definition of meaning making as a goal, or an outcome of an overall process that required the exercising of skills, intrigued us. C.S. Hart's distillation of the aspirational process offered us a provocative explanation of what we were observing. (2016, p. 330). Hart's work "found that aspirations are held concurrently and are relational, they are dynamic, often connected to other aspirations held by the individual as well as by others" (p. 326). Aspirations are dynamic, multi-faceted goals and ambitions. They may exist unacknowledged and undiscovered, or they may be fully formed and openly carried.

They can present themselves instantaneously as extensions of immediate desires or they may grow slowly, emerging over time influenced by individual and group experiences. While they are always forward-thinking, they "may also pertain to the continuity of a present state of being." The ability to aspire "sits between the freedom to aspire and the capability to achieve the particular aspiration. Thus, aspirations are powerfully situated as the forerunners to many capabilities (p. 329)."

This relationship between capabilities and aspirations arguably explains varying aspects of meaning making represented in the data which served as a sort of fascia linking codes and concepts to one another to form a unified whole. The multifarious nature of meaning making refined itself into three separate categories or constructs - attributes, skill sets, and mindsets - which parallel its presentation as an aspiration. As we further reviewed the transcripts of our interviews and examined the thoughts our interviewees shared with us, through the lens of Hart's model, it became clear to us that our results aligned exceptionally well with this model. Below are a few examples of this alignment and a more exhaustive list of examples can be found in Table 5 below. In chapter 5 we discuss the meaning we took from these results in greater detail.

Aspirations:

As an aspiration, heritage leaders expressed meaning making as a dynamic, complex intention. Bob Langert stated, "I wanted to have more meaning in my life. That's why I decided, and I dedicated myself to make a difference in the world." When asked about her perspective, Meghan Zahniser explained meaning making as an outcome:

> "Meaning making to me, I think, is about outcomes and it's sort of thinking about what is the outcome that we're striving for here and how does it

help to enhance, revitalize, vitalize communities, individuals, teams, or-
ganizations, whatever the entity might be, but it's about evolving. It's
about some sort of positive growth is ... actually, I shouldn't even say
growth, but some sort of positive outcome is what I think about when I'm
thinking about mission-driven or meaning making."

Along with meaning making, others interviewed raised aligned aspirational con-

cepts such as relevancy with comments like:

Well, how is this relevant to me? Why is it important? Why should I stop
and read this or take this course, or take this tour? Is there something that
triggers an interest in me because it is something I care about? Or is it
something I want to learn more about? (Van Mourik).

The aspiration of creating meaningful connections to place and concepts also ap-

peared frequently within the transcripts as when Tammy Rach stated, "You can have a

volunteer...give out awesome information, but if they're not making it relevant and mean-

ingful for the individual...it doesn't drive action" (Rach).

Throughout the transcripts of interviews, we frequently found examples of aspira-

tions aligned with the concept of meaning making reflected in our interviewee's com-

ments. This frequency of occurrence, along with the frequency with which the concept of

meaning making arose in alignment with comments related to attributes, skill sets, and

mindsets was a primary that led to our interest in Hart's model as discussed above.

Attributes

There are qualities exhibited by heritage leaders that do not fit nicely into the cat-

egories of a shared mindset, a similar set of skills that can readily be taught, or the kinds

of aspirations that heritage leaders may share. These qualities are attributes, and, for the

purpose of this paper, we determined to define attributes as: a quality or feature regarded

as a characteristic or inherent part of someone; a quality, character, or characteristic ascribed to someone (Oxford Dictionary, 2019). Important to the use of the term attributes, however, is a recognition that these are the aspects of a person's being that are simply a part of what that person is like (Russell & Stone, 2009). These are not qualities that are taught in trainings or measured on annual reviews. These are not descriptors of what someone believes or what their hopes for the future contain. These are the qualities that make individuals who they are at their core.

Interestingly, empathy and tenacity were mentioned specifically by the majority of the interviewees as key attributes for effective leadership. Other qualities of leadership such as integrity, passion, vulnerability, and humor; while not appearing as frequently in the transcripts, were stressed as significant by those who raised them in their interviews. Their lack of presence here should not be seen as a generalizable finding of their relative weight or significance. In other words, frequency of appearance should not be the sole measure of a concept's significance.

While interviewees expressed, in their words, feelings that personal attributes were important in the leadership process; interviewers were simultaneously noting that the vocal tones, facial expressions, body language, and descriptive language used by interviewees during these exchanges further indicated the importance of the attributes being described. For example, when Bill Gwaltney described a superintendent he worked for at Rocky Mountain National Park and discussed the importance of knowing he could trust his boss to support and sustain him in his work he made it clear to the interviewers in his word, his tone, and his demeanor that these qualities were of the utmost importance to this individual's reputation as a leader.

Interestingly, these qualities were not found solely within the transcripts of the interviews. As interviewees described examples of effective leadership, they had personally experienced, frequently, during these same interviews, the interviewers experienced the impact of these qualities on the process of the interview itself. One example of this occurrence took place when the entire team gathered to interview Dr. David Orr. After the interview, team members commented on what an enjoyable interview it was, how he put them at ease, how well he seemed to understand the concepts we were exploring, and how supportive he was of the research effort. In this case, attributes that Orr described as necessary for successful leadership expressed themselves in the manner with which he interacted with the research team. With only minor exceptions that could be ascribed to an interviewee being rushed or distracted, this experience permeated the interviews with identified heritage leaders.

The key concept of meaning making appeared frequently as an interwoven concept in relation to attributes. Ted Cable described meaning making as an attribute. "It's an attribute, I guess, … of a good interpreter is to be able to read their audience in that way in terms of helping them helping you understand what might be meaningful to them." Cable went so far as to describe meaning making as a physiological attribute: "So …the neocortex is 'Hey, I'm blind.' The limbic brain is that storytelling piece, that meaning making piece, which is 'I'm missing out on the beauty.'" (Cable)

Within the realm of attributes, empathy was another frequent concept that arose and was frequently cited in terms of being critical to effective leadership while also being something innate in an individual's character, not something that could be learned. But as an attribute that was key to the art of meaning making. David Orr described it as:

I think what it boils down to is some kind of human competence. And the word, and you've got the word empathy here in this list. I think that's a pretty good word for this trait. But basically, people who like people. And (laughs) take them for what they are. And the people that I've known I would describe as the best leaders are just people who just got along with people well. They like people, they were sociable creatures. And that doesn't mean that they're necessarily outgoing and effervescent and all of that kind of stuff. But they were - they had a certain capacity for human interaction. They were able to give the right word at the right time. They cared about the people around them.

Other attributes such as tenacity and follow through appeared within the transcripts along with honesty, integrity, and transparency. All of which interviewees described as innate characteristics of leaders, but which they also described as critical to the work of making meaning as a component of effective leadership.

Skillsets

Just as the mental attitudes or inclinations present in the heritage leadership process can be distilled down, certain proficiencies can be useful to practice professionally. The term proficiency clarifies that these particular sets of skills can be trained for, encouraged, and developed. These sets of competencies or competences stand out not only as capabilities, but also as a willingness to act if the wherewithal is present. It is not enough to simply have the skills, but a heritage leader must also have what it takes and be willing to put them to use in ways that are sometimes described as **Thinking Differently**.

The Cloud Institute's Education for a Sustainable Future: Benchmarks for Individual and Social Learning cites several higher-level thinking skills (Cloud, 2017). Based on grounded theory research supported by the Journal of Sustainability Education, the Benchmarks publication noted various "thinking skill sets frame the 'different way of thinking' that characterizes EfS." Given that four of our interviewees served as authors in

that publication, it is no surprise that similar themes emerged from our work explored

skills described as valuable by heritage leaders.

In regard to sets of skills, including both competences and competencies, meaning

making was explained as that place where everything comes together. Jaimie Cloud de-

scribed it as:

> We talk a lot about in curriculum design work, in backwards design work,
> the meaning making section is where it all comes together. So, you've got
> all your educational standards and your big questions and your transfera-
> bles and your rationale and your big ideas up at the top. And then when it
> comes down to content and skills and thinking through what you're actu-
> ally going to - what your students need to know and be able to do - in the
> order in which it's going to unfold. That's where all of that stuff you
> plinked on, or you listed at the top, that's where you bring it down and you
> actually put it into a place that it's going to actually be done. And so, it
> comes alive in a really different way. It's not a list anymore. It's actually a
> set of ingredients. It's the difference between the cabinet of ingredients
> that you have and the cake.

In relation to the ingredients of the 'cake' that Cloud described, specific skillsets

were identified by interviewees as critical to effective leadership but that also shared the

quality of being learnable skills, Deb Rowe spoke of the need to master the skill of

change management:

> I think a leader is an effective change agent, and we looked at what are the
> competencies that leaders need in order to be effective change agents
> across countries. (Rowe)

and Bora Simmons spoke of the need to learn how to build consensus in pursuit of mean-

ing making:

> I think if you can you can work on ways to be able to truly understand
> what it is that others care about and what their concerns are and how they
> think about a particular issue. (Simmons)

Rue Mapp further highlighted the overall need for heritage leaders to master the skills of

problem solving,

> So, heritage leaders potentially have a way to become bridge builders
> between communities and the problems they face to the resources that
> could help those communities solve their problems (Mapp).

A heritage leader is also effective because of their adroit use of hard skills, and it

would be remiss of us to not mention that several interviewees stressed the necessity for

leaders to master the traditional 'hard skills' of business as they develop themselves in

their work. While it was not within the scope of this project to examine the relative im-

portance of these hard skills, it is obvious from our results that a mastery of business

skills alongside social emotional competencies make heritage leaders more effective.

These skillsets, along with others highlighted in Table 5 below, offer a window

into the importance that heritage leaders place on the development of learnable skills and

the need for heritage leaders to commit to ongoing learning and personal development as

they ply their avocations.

Mindsets

A mindset encompasses the intentional or organic ways of thinking held by an in-

dividual which include attitudes and inclinations in thought around a concept or notion.

Mindsets play a culminating role as an intended outcome of the heritage leadership pro-

cess.

Lifelong commitment to learning is a mindset shared by heritage leaders and it

expressed itself in many of the comments related to skill set development found above

and in Table 5. Other mindsets also emerged as significant and related to the concept

meaning making as a sort of a fascia, linking all aspects of heritage leadership.

The finding that most of our interviewees identified the importance of being mis-

sion driven is not surprising. Organizational mission statements are used as a tool for

strategic planning that can help leaders stay on track with what outcomes are desired to

be produced and are commonplace in the organizations in which heritage leaders fre-

quently work. (Alegre, Berbegal-Mirabent, Guerrero & Mas-Machuca, 2018) However,

heritage leaders suggested that being mission minded goes beyond the use of basic busi-

ness guideline and implied that it includes a deep intrinsic desire to accomplish personal

goals that are in alignment with, and make meaning of, the organizational mission. As

Tammy Rach stated:

> ...keep your mission first and foremost in your mind, and to bring every-
> body back to that common goal any way that you can (Rach).

And Megan Zahniser expanded upon:

> What my job is is to represent the organization, to try and advance our
> mission, and I need to be authentic in how I do that and I have leadership
> coaches as well as just good friends and colleagues that repeatedly and
> still to this day, because I'm somebody that always asks for feedback any
> chance I get

This matches what Berg (2015) states around why people are inspired and drawn

to the work they do in heritage, "people have a high level of self-motivation and engage-

ment when they are working toward something very personal." This combination of be-

ing mission minded and exploring personal motivations is worth noting. Wheatley (2019)

exemplifies this by stating, "The work of social change requires a commitment to per-

sonal change. Leaders must be self-aware, noticing how they're being influenced and

changed, in both positive and negative directions. Embodying the values is the only way

to ensure their vitality." This personal connection to mission is an indicator that not only

are heritage leaders in the business of making meaning but that it is commonplace for

them to have their own, personally meaningful connections to the work they do.

This duality also expressed itself in the actual goals heritage leaders set for them-

selves and their organizations. These goals, whether stated in text or not, consisted of

connecting the past to the future with the aim of preserving and protecting shared heritage

resources and benefitting society, in a positive way. We would assert that this is meaning

making in action. In either case being mindful of the larger picture that spans through

time is key to raising awareness that informs action around the heritage in question

(Smith & Campbell, 2017).

Further, linking the concept of meaning making to mindset, Jamie Cloud de-

scribed meaning making as a thought process:

> Learning something that [fits in] your existing schema is one way of
> meaning making. Another way is to shift your schema. Shift your frame in
> order to accommodate new information. So really shifting that frame and
> being able to stay awake and conscious to know when one or the other is
> required. To me, that is a lot of the meaning making.

Other heritage leaders explained meaning making as a way of thinking as well.

Peter Smerud explained it as a visioning mindset:

> I would say that meaning making is very much a phrase that I
> would use to describe good leaders or guiding principles of good leaders,
> in that you're building shared vision, which is you're building meaning for
> all (Smerud).

The question of how meaning making gets accomplished by leaders was ad-

dressed by our interviewees by acknowledging that heritage leadership is context driven

and, depending on the need or activity, leaders adjust their approach.

>"I try and be very inclusive in the process .... but in the end, I'm not afraid
>of saying... OK thanks for all your input. This is what we're going to do"
>(Lethbridge).

As Amy Lethbridge's quote indicates, the interviewees in our study resoundingly indicated a preference for more of a collaborative approach to heritage work as a form of effective leadership. But they were also quick to indicate that there were times when they had to rely on more of the management or task-oriented side of leadership to ensure necessary or time critical tasks were completed. This theme emerged from the majority of those interviewed and indicated a mindset that, while focused on the task of making meaning in support of institutional mission statements, left wiggle room for style adjustments to meet the needs of circumstances.

Meaning making emerged strongly as a unifying concept across all four constructs of aspirations, attributes, skill sets, and mindsets. Discussed further in Chapter 5, these new constructs were more generalizable than our initial, five concept areas and offered a more illustrative overview of heritage leaders and the process of heritage leadership. Though meaning making was chief among them, poised as a sort of universal, it was not the only one. Several other concepts also fit into multiple descriptive constructs. Concepts like empathy, communication, and boundary spanning, when paired with meaning making weave together as a descriptive system of heritage leadership. In Chapter 5, we will discuss the meanings we have found as we examined meaning making as a linking concept across all aspects of Hart's model as it applies to heritage leadership and what this implies for the development of future heritage leaders as well as future research efforts in heritage leadership.

Table 5: Overview of Findings and Related Concepts

Heritage		**Finding Statement:** *Heritage is those tangible and intangible things that we inherit from those who came before us and that we have the responsibility to pass down to future generations.*		
Code	**# Used**	**Sample Phrasing / Example Quote**	**Finding Theme**	**Construct**
Heritage	106	"Maybe heritage should be HEIR-itage. Instead of HERitage, that is to say all of those things that we as human beings, we as Americans, we as citizens of a community, family, city, county, state a country in a world are heir to.... maybe that's what we're talking about. And that covers natural, it covers cultural, covers historic" (Gwaltney).	Define Heritage Differently	Mindset
Participant Definition	76	"I would say, historical background, cultural background. I suppose it could lap over into the, into the natural resources" (Gidner).	Define Heritage Differently	Mindset
Heritage Leadership and Leadership		**Finding Statement:** *Altruistic aspirations inspire heritage leaders to foster meaningful connections in order to preserve and protect our shared natural, cultural, and social heritage through the contextual application of meaning making and social emotional competencies.*		
Code	**Used**	**Sample Phrasing / Example Quote**	**Finding Theme**	**Construct**
Definition of Leadership	98	"I would say that meaning-making is very much a phrase that I would use to describe good leaders or guiding principles of good leaders, in that you're building shared vision, which is you're building meaning for all" (Smerud). "So, I used to say that leadership was something that you had or didn't have but now I see it more as a	Define Heritage Differently	Mindset

discipline. And it is a discipline that involves a tremendous amount of self-awareness and inventory knowing what you bring to the table" (Mapp).

Understanding the term [HL]	108	"I think if you're talking general public, I don't think they understand heritage leadership" (Blythe). "I would say that, public service, which I would consider heritage leadership, is that it's a calling. And there is nothing on earth better. I mean it is, for me, it's how you give back, to, your country, to your fellow citizens through your leadership and protection and stewardship of our heritage" (Jarvis).	--	--
Challenges	296	"any controversial issue is always a challenge in how you handle that delicately and with respect for all your audience members and yeah so that is a challenge" (Cable).	--	--
Consensus Building	78	"But I think if you can you can work on ways to be able to truly understand what it is that others care about and what their concerns are and how they think about a particular issue." (Simmons)	People Oriented Context Driven Inclusive Navigate Processes Effectively & Gracefully	Mindset Skill set
Boundary Spanning	22	"Don't just read stuff in your field" (Orr). "And a lot of what got lost in the process is really having the ability to have a horizontal understanding of what's happening in other facets of society" (McDowell).	Context Driven Think Differently	Mindset Skill set

Problem Solving & Solutions	78	"So, heritage leaders potentially have a way to become bridge builders between communities and the problems they face to the resources that could help those communities solve their problems" (Mapp).	Navigate Processes Effectively & Gracefully	Skill set
Situational	71	"So, I think my point is, it depends on the circumstances. I mean sometimes you have to lead a charge, sometimes you have to evoke,	Context Driven	Mindset
Pragmatic	23	sometimes you have to encourage, sometimes you have to discipline" (Orr). "I try and be very inclusive in the process .... but in the end, I'm not afraid of saying... OK thanks for all your input. This is what we're going to do" (Lethbridge).		
Serving	55	"I believe someone who is a leader seeks to raise others up, and it's not about me, but it's about us. And looks for ways to promote individuals and empower individuals, again, so that we're all moving towards that future state, whatever it may be…" (Van Mourik)	People Oriented	Mindset
Change Management	40	"I think a leader is an effective change agent, and we looked at what are the competencies that leaders need in order to be effective change agents across countries" (Rowe).	Navigate Processes Effectively & Gracefully	Skill set

Hard Skills And Business Management Skills	64 34	"I wish now that I had learned earlier in my career that these topics really would make me better at my role. A great example is finance and budgets and everything that's associated- and-HR type skills. In reflection I wish I had more training in that" (Smerud). "So, I think the idea of understanding business, regardless of whether you're in a public, private, or an academic world, you're going to...you're going to need to understand that. And I think that's the biggest hole that I see, the training" (Basman).	Navigate Processes Effectively & Gracefully	Skill set
Mission Driven	69	"...keep your mission first and foremost in your mind, and to bring everybody back to that common goal any way that you can" (Rach).	Mission Driven	Mindset
Fortuitous Accident	40	"So, I never in a million years thought I would work in volunteer services, and most volunteer services staff don't ever plan to work in volunteer services, it just kind of happened" (Rach).	--	--

Meaning Making   **Finding Statement:** *Heritage leaders use Meaning Making to create emotional connections to heritage.*

Code	Used	Sample Phrasing / Example Quote	Finding Theme	Construct
Meaning Making	195	"We're at the emotional level. And then I would say probably it's also, from that point of view, it's taking the knowledge and connecting it to the place and to an emotional connection to whatever they're there talking about. That's probably for them the most powerful meaning making moment, is where somebody is connected in a really deep and visceral way, where it just comes together" (Cloud).	Meaning Making is the ultimate aspiration	Aspiration
Relevancy	98	"Well, how is this relevant to me? Why is it important? Why should I stop and read this or take this course, or take this tour? Is there something that triggers an interest in me because it is something I care about? Or is it something I want to learn more about?" (Van Mourik).		Aspiration
Meaningful Experiences	73	"You can have a volunteer...give out awesome information, but if they're not making it relevant and meaningful for the individual...it doesn't drive action" (Rach).		Aspiration
Passion	71	"What's your passion? What's your unique contribution? And how does that fit with contributing to taking responsibility for the difference you make?" (Cloud).		Aspiration

Code	Used	Sample Phrasing / Example Quote	Finding Theme	Construct
Connection to Place	52	"I fear for the future, if we don't take the time to understand why these places are valuable and then help people to connect to them" (Blythe).		Aspiration
Participation	49	"...you're always working on inclusive participation and shared decision making" (Cloud).		Aspiration

Social Emotional Competencies (SECs)	**Finding Statement:** *Social Emotional Competencies are the attributes, skills and abilities heritage leaders wield as they engage in meaning making and developing personal leadership in themselves and others.*

Code	Used	Sample Phrasing / Example Quote	Finding Theme	Construct
Communication	145	"I think younger people need to know earlier on the best way to communicate and persuade and tell stories and build trust" (Langert).	People Oriented	Mindset
Language Use	14		Navigate Processes Effectively & Gracefully	Skill set
Listening	63	"Sometimes I think we overcomplicate things just because we kind of like to hear ourselves talk. We need cultural competency we need, sometimes linguistic competency and we don't always have that" (Gwaltney). "There's just the challenge of the ability to listen. Which I think can be really difficult for people. And certainly, I've been challenged with that too. I think the older I get, the better I am at listening. But really listening to understand, that's a real skill that one needs to develop." (Van Mourik).		

Human Centric	129	"Even if you only understand the other side better, no matter which side of any issue you are on…that is a valuable thing. [...] I think it would build empathy. You know, I don't agree with these people, but I sort of get it where they are coming from" (Cable).	People Oriented	Mindset
Forward Thinking	98	"A part of what we do is to allow people to connect with their past so that this will allow a future to happen. That is a very important component of our daily activities, that we be really talking about the past, the present, and the future and link them all together and then run a thread through all of them" (Basman).	Connect Past to the Future Think Differently	Mindset Skill set
Perspective Taking	95	"It's the act of- of bringing together really serious discussions-and the participations of different cultural groups interwoven with natural and human constructs, both in modern society but also historical perspectives and understanding the interrelationships between them" (Smerud, 2019)	People Oriented Think Differently	Mindset Skill set
Self Awareness	91	"...that self-awareness piece is what really rewards you" (Smerud).	Navigate Processes Effectively & Gracefully	Skill set
Empathy	85	"I think it takes empathy, you know, and respect" (Cable).	People Oriented Think Differently	Mindset Skill set Attribute

Collaboration	57	"You know, all these organizations are somewhat doing it in isolation and I think there needs to be a lot more collaboration amongst all of these organizations and engagement with my generation in the process, so that we, we can at least impart some of our experiences, and— and help and mentor where appropriate, but also feel ready to let go." (Jarvis).	People Oriented Inclusive	Mindset
Conflict Management	50	"[in regard to challenges] ...Not knowing how to do conflict resolution, not knowing how to be civil discourse" (Rowe).	Navigate Processes Effectively & Gracefully	Skill set
Critical Reflection	49	"The idea of doing introspective work is not new to me but how I've prioritized introspective work in the past ten years, I wish it had been more of a priority previously" (Zahniser).	Navigate Processes Effectively & Gracefully	Skill set
Tenacity	47	"part of what I think makes a leader is just sheer stamina. As somebody once put it to me, as being too damn dumb to know where you're beat. And I think that there's something too that. It's just know that you're right, or having an intuition, of being stubborn. Stubborn can also be a failure. I mean, it can also be something that it's a bad thing. But I think the one thing to acquire a certain level of just quiet stamina that keeps you at it. Keeps you on a job a little bit later at night and gets you there a little earlier in the morning." (Orr).	--	Attribute

Cultural Awareness	43	"There's not anything inherent in those choices that's better, they were choices made for reasons that are cultural. So, my point here is that I think it's essential, whatever the field, whatever the profession, whatever the discipline to under-stand those choices that we made" (Orr).	Inclusive	Mindset
Systems Think-ing	43	"You have to have the skills to think in terms of systems and find the leverage points for changing those systems, because we can't get the sustainable development with just individual change, we also have to do systems change." (Rowe).	Think Differ-ently	Skill set
Risk	42	"Stepping off a curb is not the same as jumping off a cliff, so some-times, the point there is, sometimes take a risk. And the people that we know that took risks, were sitting in the back of a bus in Montgomery, Alabama, you know, refusing to move— sitting in the front of the bus and refusing to move, you know that was a risk. Being willing to stand up for an idea, that's a risk. And sometimes you get shot, some-times you lose your job, sometimes ... But that's the price you pay for leadership. It's the willingness to take certain risks. With your career, with your reputation, with your money, with your life and so forth" (Orr).	Stretch Their Comfort Zones	Mindset
Inclusivity	42	"I think it has to do with leading from love, empathy, and compas-sion, inclusivity. (Mapp).	Inclusive	Mindset

Agility	36	"the other thing is to be versatile" (Madison).	--	Attribute
Responsibility and Follow Through	32 18	"When you hold onto the space for very, very big concerns, issues, community. You know you feel the weight of that, the responsibility of that. And you know if you allow yourself you can be overwhelmed by that" (Mapp).	--	Attribute
Worth Valuation	30 22	"I think the biggest barrier in my line of work is resources, and that's across the board it doesn't matter where you work, what type of heritage organizations you work within, it's its lack of resources but also a lack of people understanding the value of service" (Rach).	People Oriented	Mindset
Strategic Thinking	25	"[Leadership] has to be practical and persistent. And I'm a big one for logic and needs to be logical it needs to be planned needs to be thought through" (Simmons).	Navigate Processes Effectively & Gracefully	Skill set
Mentoring and Coaching	24 13	"And then we've been really talking a lot about mentoring and I think we do a great job at mentoring in the field with field skills, but we don't necessarily put the same emphasis on mentoring for leadership" (Lethbridge). "I would really latch onto the word 'coaching'" (Cable).	People Oriented Navigate Processes Effectively & Gracefully	Mindset Skill set

Moral Standards	24	"almost all the leadership that I thought was great leadership were people that were willing to take a stand that had conviction. ...That something was the right thing to do." (Langert).	--	Attribute
and				
Integrity	15			
		"It was the person, male, female, or kid, or whatever, whatever age group that did something that needed to be done and got no particular credit for it. They did it because it needed to be done, not because it moves their career needle forward" (Orr, Personal).		
Trust	15	"One of, by far, the best jobs I've ever had. Knowing I could trust my boss and trust a team of people around me. Now there are still plenty of challenges a lot of challenges relate to some of the same things, but it was a great example of leadership. And I would have done anything to not let that man down" (Gwaltney)	--	Attribute
Resilience	24	"You have to have a tolerance for adversity. You must be seen as a model one who overcomes that adversity. You have to have that communication skill. You need to be the enthusiastic optimist. And that those are going to help that group persevere through whatever challenge or tasks may be needed to achieve the outcome." (Smerud).	--	Attribute
Creativity	23	"…so, if you have a creative leader, uh, leading creative people, there— there undoubtedly will be— failures. But those are— those almost	--	Attribute

		can be celebrated in a way" (Cable).		
Vulnerability	15	"We need again to be willing to be vulnerable, so maybe it doesn't surprise me that I identify that as a trait that I have, and I think it's important. And maybe what also fits within vulnerability, is a willingness to admit when we're wrong." (Jacobs).	--	Attribute
Self Management and	15	"I would say [a leader] has a very, very high E.I., emotional intelligence. They understand their own strengths and weaknesses and are able to compliment with having the	Navigate Processes Effectively & Gracefully	Skill set
Behavior Modification	12	right team in place to work with them." (Van Mourik). "The dispositions piece that you need to be attuned to your own disposition - you know, self-efficacy" (Simmons).		
Self-care	12	"That self-care, I think, is a really important part of well, number one, the sustainability journey, but also I think for me has been a really important aspect of my own leadership and in setting the tone for the organization as executive director" (Zahniser).	Navigate Processes Effectively & Gracefully	Skill set

Chapter 5: Conclusions and Recommendations

Introduction

What then are the implications of our results for the field of Heritage Leadership? Why do certain individuals feel called to service as heritage leaders? If one is to accept the suggestions of popular author and speaker Simon Sinek (2009), the question of WHY is central to a firm understanding of the effectiveness of an individual or organization's efforts. The WHY of heritage leaders, simply put, is: **heritage leaders are committed to the ideal that meaningful connections lead to preservation and protection of our shared natural, social, and cultural heritage which is critical to the future well-being of human societies.** This WHY drives what they do and how they do it.
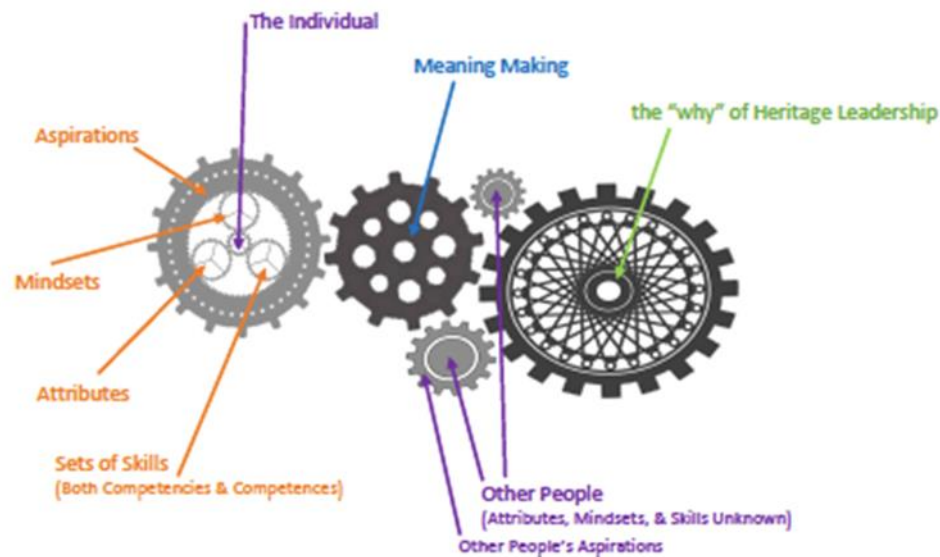

Figure 4. **Revised Concept Model**

This WHY has tangible implications for the proposed conceptual model in Chapter 2, as shown in Figure 4. Revision of this visual representation of the Heritage Leadership process must include the interaction between the WHY, Meaning Making, and SECs, while also giving credence to the individual exercising those SECs, their aspirational process, and its effect on other individuals or groups of individuals who also have SECs and aspirations in play.

The desire to create meaning both situationally and globally in service to an altruistic, higher purpose is, perhaps, the most essential piece of the entire heritage leadership system. Heritage leadership kindles the civic minded desire of an individual or group of individuals to care for, preserve, and sustain heritage with future generations in mind. Heritage leaders aspire to help others aspire to complete such work. They recognize that high level aspirations are not achieved alone; achievement of such lofty goals necessitate the participation of others. As discussed in Chapter 4, we assert that this participation is driven by the process of meaning making which requires the thoughtful and effective use of SECs to function with efficiency. Without meaningful connections, the entire system breaks down. We also assert that SECs can be sorted into three categories: attributes (abilities held innately), skill sets (abilities trained for), and mindsets (abilities exercised habitually and with intention). Skill sets, mindsets, attributes, and aspirations combine to form a system of heritage leadership linked together by meaning making.

Aspirations

As identified by interviewees, one of the key aspirations of the work they do is to further the goals of the personal or organizational missions under which they work. For

those interviewees originating from EfS, their responses included encouraging others to be forward thinkers and acting around concepts of sustainability. For those from HIn, they aspire to engage the public to encourage participation in activities that ensure the preservation of resources, places, and concepts for generations. Whether one is considering institutions organized around nature, culture, or community, the ultimate aspiration is meaning making. It is only through meaning making that these organizations can achieve their missions.

Meaning making is the heart of what sparks participation and engagement; without it, the capacity to achieve the established mission is drastically reduced. This ability to inspire or influence an individual's meaning, situational or global (Polk & Folkman, 1997), is an important part of how interviewees accomplished their goals/mission. While relevancy is an aspect of meaning making, interviewees were incorrectly applying the concept. Relevancy is a product of the use of meaning making. Meaning making is the "process of making sense of experience, of explaining or interpreting the world to ourselves and others (Hooper-Greenhill, 1999, p. 12). Their aspirations were actually to create meaning to increase relevance to drive participation.

Generating meaning plays a key role in the process of heritage leadership. While there are other aspirations certainly, many exist on a lesser plain operating as steps or, as Arnstein (1969) described, rungs in the ladder of participation. For instance, an organization may desire to increase empathy within the community as a means of promoting environmental equity and justice. Increasing empathy and reducing environmental degradation both sit as outcomes of the process of participation; however, without first making meaning for its audience, engaging in that work would be impossible.

As noted in Chapter 4, aspirations drive the acquisition of capabilities and functionalities, or skill sets and mindsets. The simple ability to be forward thinking and future oriented requires a "basic level of capability in relation to being able to anticipate and imagine the future and exercise practical reason" (Hart, 2016). At their most basic and unrefined levels, these capabilities equate to attributes held innately. Their polished and sophisticated forms, however, become social and emotional skill sets which when exercised habitually and with intent develop into mindsets, or 'functionings'. Functionings and capabilities may proceed and parallel each other depending on the strength of the existing attributes, skill sets, and mindsets exercised by the individual. Arguably, however, attributes may be the product of societal positioning and privilege.

Meaning making is the frame of the ladder leading to other aspirations or desired outcomes. Theses aspirations can be divided into two separate categories: external and internal. External aspirations are those that are quantifiable and collaborative. They are aspirations made physical; for example, reducing litter. Internal aspirations are heuristic and individual. They include ideas like relevancy, meaningful experiences, passion, connection to place, and participation. Each of these aspirations, external or internal, is inextricably intertwined with global and situational meaning making positioning them as a product or outcome while also sitting alongside as a parallel aspiration. Furthermore, meaning making stems from the effective use of SECs making it systemic operation of heritage leadership. This pervasiveness makes meaning making an integrating context across multiple levels.

Attributes

The debate surrounding whether or not an individual's attributes are something inherent in their personality and character or whether or not they are something an individual can learn through applied effort is nothing new. The two schools of thought can trace their lineage as far back as the debates that raged in the 1500s regarding the concept of the divine right of kings and likely back even further still. While settling this long-running debate is not within the scope of this paper, it is interesting that participants expressed ideas in support of both sides of this argument. Rath (2007) argues that one's attributes (he refers to them as strengths) are an inherent part of an individual and recognizing one's greatest strengths and focusing on developing in those areas is where an individual might get the most "bang for their buck", as opposed to trying to overcome weaknesses. Boyce et al. (2010) would seem to echo this perception that individuals can, through dogged hard work, improve their leadership attributes. However, they share the concern that Rath notes above that the actual development of attributes, or strengths, is difficult if some aspect of the attribute is not already present in an individual's qualities.

We found it reassuring that the attributes identified in our work aligned with great precision with the work of Den Hartog et al. (1999) and Conger and Kanugo (1994) on identifying universal and cross-culturally generalizable attributes of leaders. These previous works focused on the efforts of individuals engaged in charismatic and transformational leadership but, as discussed in our literature review, much of the work of heritage leadership, particularly the significant role of meaning making in heritage leadership work, has a tendency to align itself well with the concept of transformational leadership.

(Kofman, 2018) We found great comfort in the alignment of our findings with the desired attributes of leaders identified in previous, foundational, and oft-cited works.

As noted in Chapter 4, a variety of concepts that align as attributes were found including: empathy, integrity, trust, tenacity, passion, and resilience to name a few. While it is beyond the scope of this paper to fully explore which of these are the most significant attributes for a leader to have it is interesting to note that many of these attributes were described universally by the interviewees. What is clear, from our findings, is that an individual's attributes have bearing on their success as a leader and it is useful for us to discuss how that impact plays out.

Interviewees frequently associated the attributes of leaders they respected as being qualities that made others effective in their work and examples that interviewees shared highlighted their own desires to emulate these attributes. How then do these attributes interact to support the activities of heritage leaders and, especially, meaning making in the process of leadership? Descriptions of attributes and examples of their applications emerged from interviewees' descriptions of attributes that supported them internally in their heritage leadership work, external efforts to lead teams or projects, and in the work of leaders they respected. The nature of the outcomes and impact on meaning making achieved through the application of these attributes draws an obvious parallel to Maslow's (1943) hierarchy of needs. Heritage leaders, across the range of professions represented in the UMSL cohort and amongst the interview pool, are responsible for providing support ranging from basic physiological needs all the way up Maslow's pyramid to self-actualization. While providing for basic needs such as food, water, and shelter is, perhaps, a less frequent endeavor of heritage work, examples of Maslow's other levels

of need are easy to identify in the work of those who lead projects, teams, and organiza-

tions. Comparisons to Maslow in relation to the leadership process are hardly new but in-

clude some interesting thoughts such assertions by Burns (1978) and Handy (1995) that

transformational leadership moves followers along the pyramid not just to self-actualiza-

tion but beyond it to a state of self-realization or self-idealization. Meaning making, self-

realization/idealization are readily identifiable as aligned states of understanding or be-

ing. In many ways, a heritage leader's job is to foster an environment that supports the

safety needs, social needs, esteem needs, and self-actualization needs of whatever group

they are leading in pursuit of meaning making and other lofty goals of heritage work. For

example, a team working on a project related to a controversial topic like climate change

is less likely to be effective in their work if they do not feel free from retribution in their

work, if they do not feel that they are a valued part of a team, if their efforts do not feel

respected, and if they do not feel that the work is going to lead to a meaningful result. A

leader's attributes can support all these needs and, if a leader can move followers to the

above described state of self-idealization, a leader can, perhaps, foster the next generation

of heritage leaders by inspiring meaningful connections to the work at hand. Similarly,

Kofman's (2018) assertions about the importance of meaning in transformational leader-

ship ring true; if heritage leaders' own, internal needs are not met and they do not feel

that they are leading towards meaningful goals or outcomes they are less likely to suc-

ceed as leaders.

  While it is unlikely that any single individual will embody all the attributes listed

in this paper it is key that heritage leaders identify, embrace, and strengthen their attrib-

utes as key to effective and sustained work in heritage leadership. Can attributes be

learned or are they innate? Again, this is beyond the scope of this research but the important roles that leaders' attributes play is beyond question.

Skill Sets

Heritage leaders must be willing to challenge their comfort zones, and this includes thinking "outside of the box" in pursuit of meaning making, As noted in chapter 4, our interviewees strongly identified the competencies of strategic thinking and systems thinking as critical to this work.

Systems thinking is one of the primary skills recognized in the field of EfS. For example, the Center for Ecoliteracy described what it viewed as core competencies in the context of head, heart, hands, and spirit in the precepts of their "Smart by Nature" program (Stone, 2010). Within the cognitive realm (the head), they included the abilities to: "approach issues and situations from a systems perspective; understand fundamental ecological principles; think critically, solve problems creatively, and apply knowledge to new situations; assess the impacts and ethical effects of human technologies and actions; envision the long-term consequences of decisions" (2010). Similarly, we also see Problem Solving and Moral Standards show up in The Center for Ecoliteracy's list of cognitive competencies. We found a solid alignment with these sources from the literature in our results and feel that this further solidifies the validity of our results.

As noted in Chapter 4, Thinking Differently is another a key skill set area for heritage leaders to develop. Wiek et al. (2011) had previously divided the "different ways of thinking" of sustainability in a similar fashion. In his early research, he posited that Systems Thinking and Strategic Thinking were matched by Values Thinking and Futures

Thinking in their categorization of competences. Our results strongly suggest this as an area of significant focus for the development of proficiency in heritage leadership too.

Another set of skills that emerged from our results and that we identified above as necessary for the work of heritage leadership is the ability and willingness to navigate processes effectively and gracefully. Heritage leaders must be at the helm of their own habits and the in control of the professional "hats" they might wear. Heritage leaders steer the process as they seek to positively affect the world. Our results show a need to do this gracefully by utilizing both inward and outward facing social emotional competencies that are definitely in the realm of learnable skill sets. The ability to look inward at one's habits, tendencies, emotional responses and reactions, contrasts with an outward facing focus in heritage leadership. Critical reflection, self-awareness and self-care, as noted in our results, are significant areas in which heritage leaders should focus personal and professional development efforts. Emotional intelligence theory suggests that these fall under the category of interpersonal competence, or what Goleman refers to as "self-awareness" or "self-management" (Goleman, 2006). Those externally focused abilities, the intrapersonal competence Goleman refers to as "social awareness" or "relationship management," may be what many people are probably more familiar with, given that a good leader's capacity to adeptly handle situations, tasks, and other people is much more obvious than her unseen, internal abilities.

The capacity for change management and conflict management identified in our results is also worthy of attention. These skills are what allow a heritage leader to nimbly make things happen for and with other people. In conjunction with these concepts, an aligned need to be able to engage in boundary spanning was identified above. Our results

suggest this as another example of the interconnectedness of the actions and abilities of heritage leaders. Interestingly, the act of boundary spanning could also be considered another way of thinking differently and of making meaning. Moving beyond one's area of comfort to think outside the box may refer to the process of drawing from diverse fields, but also the intent to innovate or build relationships. Boundary spanning also indicates that heritage leaders are willing to look to new, and sometimes unusual, options for connecting others who may not share a leader's worldview to heritage in meaningful ways.

Our results indicated a clear set of developable skills for heritage leaders to focus on in their development of self and others. Implications for this are outlined below but can be summarized with the thought that heritage leaders who fail to focus on these critical areas of skill development do so at the risk of severally hampering their ability to make meaning.

Mindsets

As described above, interviews revealed a distinct collection of mindsets key to success as a heritage leader. These included but aren't limited to an understanding of the concept of heritage, a mission-oriented mindset, a focus on using past learning to inform future goals, an ability to flex their leadership style as situations warrant, and a people focused orientation.

The finding that heritage leaders viewed the concept of heritage differently was not surprising, but it is worth noting that there is still much to explore around this topic. Not only did this appear in our data but is considered a common challenge in heritage literature. Our findings correlated with Harvey (2001) who expressed heritage as both a

product and a practice with an emphasis on history being brought forward from the past and then ascribed a current meaning. Defining the actual tangible and intangible resources that make up heritage, as well as how one goes about working with heritage to achieve a desired result, is also still being defined and is utilized differently depending on the heritage leadership field. Waterson, Smith, & Campbell (2006) offer additional insight into this challenge by showcasing the subjective nature of ascribing contemporary meaning and value to heritage in a global setting as well as highlighting the difficulty in determining who has the authority to define heritage and determine its future. Adding our findings to this discussion makes it clear that more work around a shared understanding of the term heritage is critical.

The focus of learning from the past to inform the future involves a forward-thinking mindset to implement organizational, behavioral, or policy changes that may be needed to safeguard heritage. For EfS, forward thinking is used as a mindset to design sustainable practices with goals ranging from engaging the community in areas of awareness and action, all the way up to the generation of policy to ensure the continued existence of heritage resources for generations to come (Freestone, 2015). Similar work does not appear to have yet been done in the HIn field and our results suggest a similar effort is warranted.

The frequency with which we heard the concept of situational leadership in where, "effective leadership requires a rational understanding of the situation and an appropriate response (McCleskey, 2014, p. 116) was somewhat surprising to us. We had anticipated a strong preference for collaborative leadership to emerge from the conversations with heritage leaders. The fact that many of them expressed a strong desire to lead

in a collaborative manner was expected but follow up comments from most interviewees that they frequently flexed their leadership style to fit circumstances was a bit of a surprise. It leads us to conclude, though, that a strong understanding of and the ability to practice situational leadership is a key, developable mindset in heritage leaders. Situational leadership was originally developed by Hersey and Blanchard (1996) and states that both the relationship and task aspects need to adjust to the level of maturity found in the people that leaders oversee. Our data suggests that it is critical for heritage leaders to master this mindset. Or, to rephrase an adage from Abraham Maslow, heritage leaders need more tools in their toolbox than just a hammer.

The preference for collaborative leadership identified in our results, however, also translated to an interest in connecting to others in an inclusive manner while working to achieve a common organizational goal. Collaborative work encourages coming together to work as a larger group where individuals contribute their part to an interconnected relationship that allows for mutual gain and the fulfillment of a common goal (Thomas, 2004). We assert that heritage leadership in general would benefit from being as inclusive as possible to tackle ongoing challenges faced by heritage leaders. Our shared natural, social, and cultural heritage encompasses all humanity and any, non-inclusive approach to solving problems of this nature is bound to fail. Waterson, Smith and Campbell (2006) illustrate what this may entail by indicating that, "community participation must hinge on the concept of negotiation, not only over conservation and heritage values but also over the very meaning and nature of heritage, so that the conservation ethic itself is open to renegotiation and redefinition" (p. 14). There must be a willingness to include the

voices of underrepresented groups as all are either directly or indirectly affected by herit-age preservation and sustainability policy and practices. Inclusion, framed this way, in-volves keeping in mind the cultural influences Soini and Birkeland (2013) list as includ-ing their economic, social, and environmental nuances. In this way, comprehensive sus-tainability or preservation practices and policy may be generated. As a converse, inter-ventions in heritage work may not always serve the community and may be politically driven which can, "undermine rather than strengthen community identity, cultural diver-sity and human rights" (Logan, 2011, p. 231).

Having the people-oriented, inclusive mindset necessary for effective heritage leadership requires an openness to the perspectives of others, the meanings they hold, and a willingness to raise one's awareness of people's many differences. A heritage leader seeking effective collaboration must exemplify and embrace the concept of inclusiveness as well as the previously discussed attribute of empathy as a primary component of herit-age leadership work. (Hojat, Bianco, Mann, Massello, & Calabrese, 2014).

The mindsets identified as critical to heritage leadership, in our study encompass a broad, but not unattainable orientation for heritage leaders to focus on developing. We've discussed the implication of some of the mindsets identified as most critical by our participants, however, it is worth noting that other mindset areas were identified that may prove worthy of future discussion or exploration by those studying heritage leader-ship in the future.

As heritage leaders build from their aspirations, apply their personal attributes, and continually develop their skill sets and mindsets in inclusive communities of practice the results may well mirror what Senge (1991) speaks of as the winning ingredient in any

effective learning organization, "where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together." This is the stage set by heritage leaders as they strive to sustain, protect, and preserve our shared natural, cultural and social heritage.

Limitations and Recommendations for Further Research

Summary of Recommendations

1. Clearly define heritage leadership and the areas of activity that exist under the umbrella term of heritage leadership.

2. Exploration into what draws heritage leaders to pursue their given professions.

3. Further examining the instances and implications of using terminology differently between heritage leadership fields and the outcomes this produces.

4. What motivates heritage leaders to stay in their respective professions given the emotional obstacles inherent in the work itself.

1) A significant finding of our work was the framing of a baseline definition of heritage leadership. However, we recognize that this initially proposed definition is more of a starting point than an ending point. Additional work is required in this area to refine this proposed definition if it is to stand in the long run. This formative definition of heritage leadership was developed through discussions with recognized leaders in the fields of HIN and EfS and should be further tested by additional review of the definition within those professional affiliations. An ongoing review and revision of the definition is called for to further hone and establish a lasting definition of the field of study. Additionally,

examination of the definition and considering its applicability and generalizability to other heritage leadership professions is called for. Finally, identification of the full scope of heritage leadership professions is called for. At one point in our discussions, it began to feel like heritage leadership could be applied to almost any profession. Further examination suggested that there is an altruistic component that must be present for a profession to be considered heritage leadership. However, further work on narrowing the focus beyond just professions or work with an altruistic component is necessary for the credibility and focus of this emerging field of study.

2) Another possible new line of inquiry recommended is around the motivations behind how heritage leaders enter their respective fields. Many of the participants shared that they had an experience connected to a heritage resource or heritage leader that meaningfully influenced them and their passion for the work they pursued. Included in this, was the fact that many of the study's participants felt that they had fallen into their past or current roles fortuitously. After only a few interviews the research team did add the code Fortuitous Accident out of curiosity to see if this phenomenon was isolated to a few participants or more prevalent across the collected data. The number of times it came up as a point of interest suggest there is more work to be conducted to have a better understanding of the motivating forces that inspire individuals to seek our leadership work in heritage related professions.

3) Additionally, the process of heritage leadership would benefit from obtaining a better understanding of the different interpretations of, frequently used terms such as sustainability and preservation used in the fields of EfS and HIn, as well as how these cross reference between these and other heritage leadership fields. Development of a shared

vernacular across professions living under the umbrella of heritage leadership would be beneficial to cross-profession understanding and collaboration. In alignment with this thinking, it is also suggested that heritage leaders engage in the ongoing exploration and debate as to the meaning of 'shared heritage'. Agreement does not yet exist over the meaning of this term that is core to the work of heritage leaders and establishing a more detailed understanding of this concept would be beneficial to the ongoing work of individuals across all areas of heritage leadership.

4) Further examination could also assist in generating a deeper understanding of passion, tenacity and other attributes that connect with why and how heritage leaders are able to stay engaged in the work they conduct when faced with various obstacles and challenges inherent in the highly emotional work they conduct. As mentioned in Chapter 4, this work can require a high emotional investment and the possibility for burnout or compassion fatigue is something worth investigating on a deeper level, as well as what it would take to counter its effects.

In summation, this study has opened a window into defining heritage leadership and the aspirations, attributes, skill sets, and mindsets that HIn and EfS practitioners bring to their work. However, the window has just been opened and its opening has exposed significant, additional areas of research for the future in pursuit of generalizability across all professions existing under the heritage leadership umbrella.

Implication of the Results for Practice

The results of this study have implications for the recruitment, training, and ongoing development of individuals working in or wishing to work in heritage leadership

roles. The most significant recommendations include three main areas of emphasis elaborated on below.

    1) As a possible approach in recruitment, organizations may find benefit in broadening their hiring criteria to extend beyond the hard skill experience acquisition and recognize that particular mindsets and attributes may actually carry equal weight in desirability and applicability. A quick literature search reveals many studies that showcase the importance of social emotional competencies in the business world which include a cumulative study conducted by Robles (2012) who identified the top ten desirable soft skills in executive new hires to include, "integrity, communication, courtesy, responsibility, social skills, positive attitude, professionalism, flexibility, teamwork, and work ethic." Heritage organizations would benefit by keeping this in mind when recruiting for leadership roles.

    2) Once onboarded, organizations would benefit from investing in ongoing personal leadership development of staff and volunteers in order to better support both tangible and intangible heritage leadership goals. Placing a high priority in training individuals to grow and develop their leadership skills is a long-term investment that may take time to fully mature. The use of mentoring and coaching was alluded to and recommended by several interviewees in this study and supported in literature across disciplinary fields as a way to promote critical reflection and strengthen interpersonal skillsets. Cull (2006) highlights what is included in mentoring stating that it, "helps people to focus on the challenges, choices, consequences, creative solutions and conclusions" (p. 9). This is a hugely important component to encouraging self-reflection and personal development in the workplace. Tjan (2017) shares the possibility in this facet of leadership development

by indicating, "Work is one of the strongest influences of personal development. This endows business leaders with enormous responsibility and enormous opportunity to pay it forward" (p. 14).

3) Although personal leadership can be seen and adapted throughout an organization in various roles, it is important to recognize that effective heritage leadership as mentioned in this paper requires unique skills and abilities that differ from traditionally non-ascribed leadership roles. For example, it surfaced in our data that sometimes the very skills, whether technical or interpersonal, that made a particular frontline employee successful may not necessarily translate to equal success as expectations and demands shift though the acquisition of a new role or promotion within the same or similar organization. Recognition for the need in the development of necessary skills should be anticipated and provided for to incoming staff and volunteers within heritage leadership fields to ensure future leaders, as well as the organization itself, are set up for success.

Conclusion

Our exploratory study offers intriguing insights into the possibilities and potentialities offered by heritage leadership as an emergent field of study. We also assert that our finding of meaning making as an integrating context that unifies work across all aspects of heritage leadership work is significant and worthy of further study. The foundational definition of heritage leadership we offer provides a springboard for others to use in search of refined definitions, and of definitions allowing generalizability across all aspects of heritage leadership work. We've offered suggestions for professional development and recruitment for leaders in heritage work and a framework for lifelong learning

efforts for those in leadership roles. We offer our work as a starting point for future re-

search and challenge those who come after us to take what we've done and use it to build

a Theory of Heritage Leadership.

Appendix A: Researcher Background

Tom Moffatt has worked in the field of HIn for thirty-one years in capacities ranging from front-line interpreter to nature center director to park system administration. His work has all taken place at local and regional parks in the state of Minnesota. Tom has considered his professional focus as HIn for most of his career but has spent much of the last 17 years in administrative and leadership roles in education focused, park and nature center settings. Tom holds a BA in Biology with an emphasis on ecology and a minor in S.E. Asian Studies, he also holds a M.Ed. in Environmental Learning and Leadership. His experience and education have led to his belief that effective leadership is a critical component for HIn to be successful at communicating information about the environment to the larger public. His experience has also led to a belief that leadership is not only connected to positions of authority but that it can occur at all levels of an organization involved in heritage work and emerges from paid staff, volunteers, and members of the public in many, varied ways. Prior to his participation in this program, he had not heard the term Heritage Leadership used to describe work in his profession although he was well familiar with the term HIn. Making a connection to the concept of Heritage Leadership was a fairly easy step for him although he found the breadth of occupations and experience represented within the UMSL Heritage Leadership Cohort to be a bit surprising. Tom finds his personal inspiration in exploring the wild areas of the world but has a particular affinity for northern Minnesota.

Areas of Lead Accountability: research question development, IRB review, paperwork wrangler, leadership literature review, leadership content expert, methodology and data collection strategy development, bias review section, heritage leadership and leadership results, heritage leadership definition framework, leadership attributes section, tables of contents, participant portrait section, final document edits and formatting, reference section management,

Lynn Cartmell is an experienced interpreter and visitor services professional, she spent 12 years working for the National Park Service before transitioning to the U.S. Fish and Wildlife Service. She holds a Bachelor of Arts in history and a Master of Arts in history—museum studies. Specializing in audience engagement through effective communication, she has wrestled with the definition of Heritage Leadership and those who might identify as heritage leaders which lead her ask bold questions in pursuit of this line of research. As a historian, Lynn took a hard look at heritage and its multi-faceted meanings and worked to track the current usage of the concept of Heritage Leadership. Though she contributed to a handful of research interviews, a greater amount of her time was spent on analysis, data interpretation, and editing. Working to cohesively mesh four very different writing styles was no easy task. Lynn also introduced Hart's research on the aspirational cycle.

Though she found immeasurable value in participating in the inaugural cohort at UMSL, Lynn recognizes that engagement in this program should, be skewed as a bias as the Heritage Leader phenomenon has not be fully explored or adequately articulated. Similar statements can be made about the fields used to conduct the study. These factors alone, however, should not invalidate this research. Instead, she hopes that it will spark insight others.

Areas of Lead Accountability: Overall editing of document, research question development, heritage and heritage leadership literature review, heritage content expert, aspirational cycle modeling, impacts and outcomes section, protocol revisions, code group analysis, heritage results section, aspiration section, final finding statements, concept to construct section,
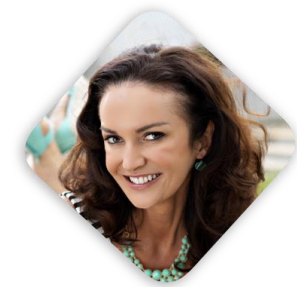
Tonia Herndon believes in the power of transformative change through her work and the work conducted within the diverse heritage leadership fields. She is currently a contracted corporate trainer and university professor for Point Loma Nazarene University. This experience, coupled with her years as the interpretive trainer San Diego Zoo Global, has afforded her many opportunities to observe how both formal and informal education interplay with assisting others in discovering their strengths and subsequently making their own individual contributions to better the world. Her educational background includes a Bachelor of Arts in International Security and Conflict Resolution, as well as a master's in Nonprofit Leadership and Management. With this experience Tonia seeks an ever-deepening understanding of heritage leadership work and a desire to explore new pathways to overcome the disconnect that can be seen around us. In true heritage leader fashion, she desires to bring individuals and communities closer to one another, as well as encourage stronger interconnections to nature and our environment. Her passion is reignited though her love of international travel and connecting to indigenous tribes from all corners of the world to learn more about alternate views of living a more integrated life with nature and one another.

Areas of Lead Accountability: Meaning making literature review, meaning making content expert, research question development, grounded theory design, sampling procedures, leadership literature review, meaning making results, conceptual model framing, skillsets and mindsets sections, interview protocol creation and revisions, literature connections to protocol sections.

Katy Mike Smaistrla currently serves as the Sustainable Energy and Environmental Coordinator at the University of Missouri - St. Louis as well as an adjunct instructor in Sustainability and Urban Ecology at Harris-Stowe State University. Her work has always been closely linked to higher education, and she believes that institutions of formal and informal education can support and shape sustainable communities and even instigate civic engagement. The three concepts in the program's subtitle drew her to enroll as a doctoral student in the UMSL Heritage Leadership program, and she looks forward to further researching and connecting with students on the interplay between sustainability, social justice, and participatory culture. Some of the most recent steps in her journey have encouraged her to grow curious about how the underpinning of contemplative practice can reinforce the praxis of these concepts. She has worked in the field of sustainability education for the past thirteen years after receiving her Masters' of Science from Lesley University via the Audubon Expedition Institute, a completely immersive and experiential program studying environmental education and leadership. Prior to that, she worked in various positions in the fields of outdoor, environmental, and experiential education, and received her Bachelor's of Science in Recreation, Park, and Tourism Administration and Women's Studies from Western Illinois University. As such, she is drawn to creating inclusive and transformative educational settings, and passionately believes in the role of educator as change agent to create whole and just visions for the future.

Areas of Lead Accountability: research question development, EfS content expert, SEC literature review and framework, Initial concept model creation, final concept model creation, SEC results section, mindsets conclusion section, graphic design/layout guru,

Appendix B: Participant Overview

Inter-viewee Name	Title	Ethnic-ity	Gen-der	Educational Background	Area of Professional Emphasis	Years in Profes-sion
Phase 1 Participants						
Ted Cable	Professor Emeritus	White	Male	Forestry and Wildlife Biology	Ornithology, human dimensions of wildlife, interpretation	40
Jon Jarvis	Retired Director of the National Park Service	White	Male	Biology	National Park Service	30+
Amy Lethbridge	Executive Director	White	Female	Leadership and Change, Heritage Tourism, Organizational Management	Ecotourism, Indigenous Tourism, Community capacity building	30
Mark Madison	Historian	N/A	Male	History	USFWS	N/A
Rue Mapp	Founder and CEO	African American	Female	Art History	Outdoor Afro, Outdoor Recreation and Education	N/A
Tom McDowell	Associate Superintendent	White	Male	N/A	Outdoor Education	35
Bora Simmons	Director of Sustainability	N/A	Female	Environmental Education	Environmental Education	30+
Phase 2 Participants						
Cem Basman	Retired Professor	White	Male	Human Dimensions in Natural Resources	Sustainable Tourism Development/heritage interpretation	43
Tucker Blythe	Superintendent	White	Male	Historic Preservation (BA) & Communication (MA)	Management/Leadership/Cultural interpretation	22
Ted Cable	Professor Emeritus	White	Male	Forestry and Wildlife Biology	Ornithology, human dimensions of wildlife, interpretation	40
Jamie Cloud	President	N/A	Female	Sustainability	Sustainability Education	N/A

Jerry Gidner	Principle Deputy Special Trustee for American Indians	Native American	M	Zoology, law, natural resources, business	Leadership	27
William W. Gwaltney	N/A	Mixed African American and European	Male	Parks and Recreation Management and Western US History	Frontier History/African American History/Multicultural History of the American West	40
Emily Jacobs	Certification and Training Manager	White	Female	Natural Resources, Environmental Education, Interpretation	NAI, Professional development and training	22
Bob Langert	VP of Sustainability	White	Male	Business	Corporate Sustainability	25+
Amy Lethbridge	Executive Director	White	Female	Leadership and Change, Heritage Tourism, Organizational Management	Ecotourism, Indigenous Tourism, Community capacity building	30
Julie Newman	Director of Sustainability	N/A	Female	Natural Resources and Environmental Studies	Sustainability	20+
David Orr	Retired Professor	N/A	Male	International Relations	Sustainability, Environmental Education	40+
Tammy Rach	Senior Manager	N/A	Female	N/A	Zoo Education, Volunteer Services	N/A
Debra Rowe	Professor of Energy Management	N/A	Female	Business, Psychology	Sustainability	30+
Peter Smerud	Executive Director	White	Male	Outdoor Recreation, Natural Resource Management	Environmental Education, Sustainability, Nonprofit business	33

| Jaime Van Mourik | Vice President, Education Solutions | N/A | Female | Bachelor of Architecture, Master of Architectural History | Education of a sustainable built environment | 12 |
| Meghan Fay Zahniser | Executive Director | White | Female | Environmental Studies, Organizational Management & Development | Sustainability non-profit | 19 |

Appendix C: 2017 Heritage Leadership Interview Protocol

2017 Heritage Leadership Interview Protocol

Question 1:

Describe effective leadership.

Question 2:

If I add the word "heritage" to the mix— how would you describe effective heritage leadership?

Question 3:

What's the why of heritage leadership? (this question was particularly problematic to many)

Question 4:

Was there a time when you felt like, "This is it. I didn't go looking for this moment. But it happened. Now I have to step up and be a heritage leader"?

- If so, will you tell me that story?
- If you had to summarize what you learned from that experience in a word or short phrase, what would it be?

In the next set of questions, I'm going to ask you about heritage leadership needs, opportunities and challenges.

Question 5:

What kind of heritage leadership needs to happen?

Question 6:

What heritage leadership opportunities exist?

Question 7:

What are the main heritage leadership challenges?

Question 8:

What skills and capacities are essential for heritage leaders in the future?

Question 9:

What's the essence of a heritage controversy?

- Please tell me about a time when you knowingly or unknowingly stepped into the middle of a heritage controversy...

Question 10:

How could a heritage leader thrive in the current societal context?

Question 11:

Do you have any advice for an aspiring heritage leader?

Question 12:

Anything else to add?

Appendix D: Revised Heritage Leadership Interview Protocol

Revised Heritage Leadership Interview Protocol

QUESTION 1:
Tell us a little about what you do and why you chose to do this work.
 a) What has been the path that led you to your current role?

QUESTION 2:
 Before being asked to be a part of this study, had you ever heard the term heritage
 leadership before?

QUESTION 3:
What does the term 'heritage' mean to you?
 a) When you hear the word 'heritage' used in relation to terms like heritage leader-
 ship, heritage preservation, heritage studies, or HIn, what does 'heritage' mean in
 these contexts?
 b) How does heritage connect to your work?

QUESTION 4:
What does the term 'leadership' mean to you?
 a) How and where have you observed leadership occurring in organizations,
 society, or social movements? Give an example.
 b) What does the concept of "leadership" mean to you in your profession?
 c) Have you ever observed activity that you would consider to be leadership
 occurring without a single, identifiable 'leader?' What did that look like?

QUESTION 5:
 Given your own experience with leadership, where would you place your work on
 the attached continuum? (See below)
 a) Do you always lead in the same way? If not, tell us more about why.

Question 5: (Revised) (used after the first 5 interviews)
 As we've been interviewing others for this study, our previous interviewees have
 indicated that, instead of having one fixed style of leadership, they flex their lead-
 ership style to meet the circumstances of varying situations. Would you say that
 this is true for your own leadership practice or would you say that you tend to
 have one, 'go to' style that you depend on?

QUESTION 6:
What are some of the barriers you can identify in the process of heritage leadership?
 a) What would be needed to overcome these barriers?
 b) Can you elaborate on a personal example of overcoming a barrier?

QUESTION 7:
What does the concept of "meaning making" mean to you in your profession?
 a) How does meaning making contribute to achieving certain aims within heritage
 leadership, and how can we best capitalize on or enhance this process?

b) Does it take any particular skill, and can you offer an example.

QUESTION 8:

We are using the terms "soft skills" and 'social emotional competencies' to describe concepts such mindfulness, reflection, empathy, and others that have been described by leaders in other professions. What does the concept of "soft skills" or "social emotional competencies" mean to you in your profession?
a) Please list and define a few of the most important of these skills
b) How do effective interpersonal skills (soft skills) apply to your work?

QUESTION 9:

If you were to start out in your profession again, what skills and abilities do you wish you could have gained at the start of your career to help you be more effective as a leader?
a) What advice would you offer individuals currently entering the field.

QUESTION 10:

Do you believe the concept of heritage leadership is recognized or understood currently? Why or Why not?
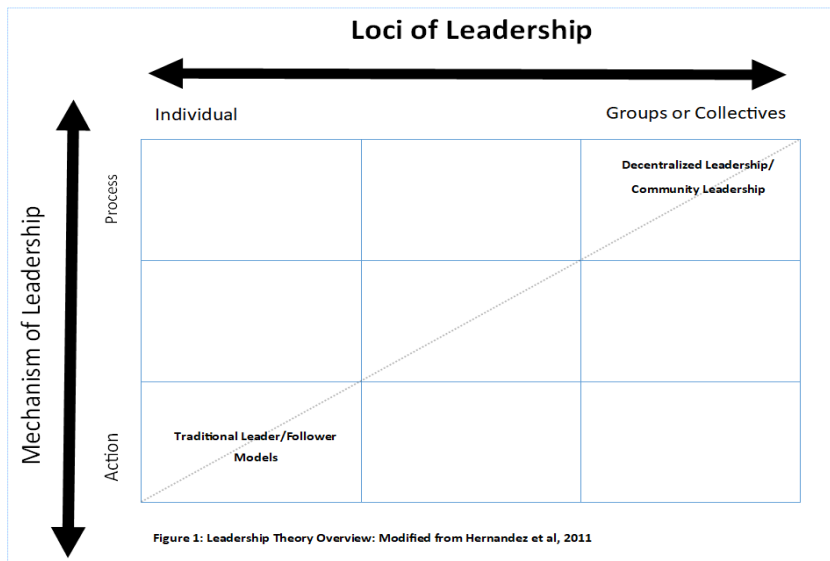a) In what areas of heritage work is leadership most needed today? In years to come?

QUESTION 11:
Who else would you recommend we talk to for an interview?

QUESTION 12:
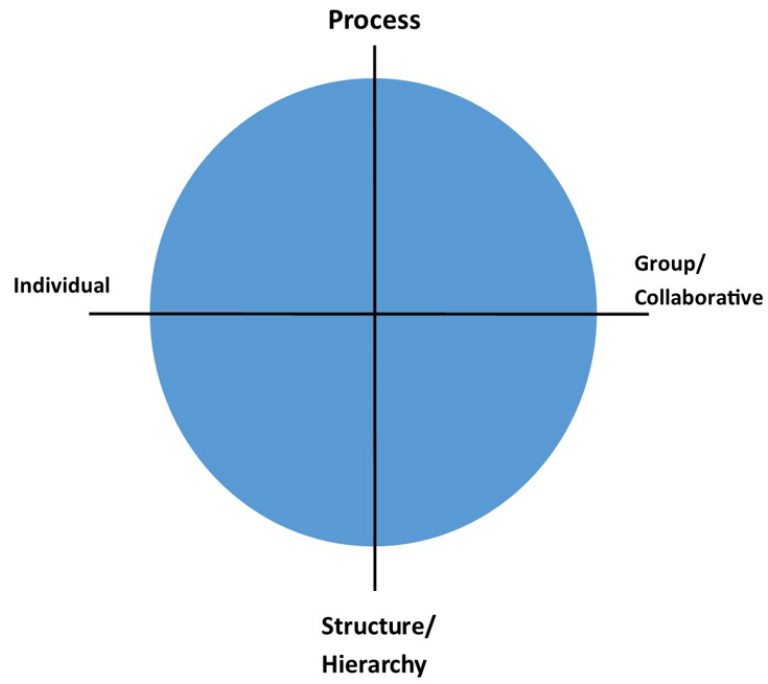What else should we know that we haven't discussed with you?

Question 5 Continuum Grid

Figure 1: Leadership Theory Overview: Modified from Hernandez et al, 2011

Revised Question 5 Graphic

Process

Individual

Group/
Collaborative

Structure/
Hierarchy

Appendix E: Heritage Leadership Initial Concept Model Connections to Literature and Protocol

Initial Concept Model Connections to Literature and   Protocol

Blue Cogs: Heritage, Leadership, and Heritage Leadership			
Heritage	Defining Heritage	Never inert, people engage with it, re-work it, appropriate it and contest it. It is part of the way identities are created and disputed, whether as individual, group or nation state.	(Harvey, 2001)
	Tangible & Intangible Heritage	Local and global communities contribute to identifying and defining heritage to place in UNESCO care.	(Lenzerini, 2011) (Diène, 2008)
	Policy on Heritage	Exploring who has the right or ability to define heritage on a nation state level. Expert vs. non-expert voices.	(Waterson, Smith & Campbell, 2006)
Leadership	Scope of Leadership Theories	Multiple theories of leadership exist across a spectrum from individual to diffuse	(Hernandez, 2011)
	Meaning Making Process	Leadership is a process, not an act	(Drath and Palus, 1994, 2008)
	Diffuse Leadership	Leadership can be shared among many	(Bolden, 2011)
Questions Related to Heritage:			
2) Before being asked to be a part of this study, had you ever heard the term heritage leadership before? 3) What does the term 'heritage' mean to you? a) When you hear the word 'heritage' used in relation to terms like heritage leadership, heritage preservation, heritage studies, or HIn? b) How does heritage connect to your work?			
Questions Related to Leadership:			

THE HERITAGE LEADERSHIP PROCESS

4) What does the term 'leadership' mean to you?

    a) How and where have you observed leadership occurring in organizations, society, of social movements? Give an example.

    b) What does the concept of "leadership" mean to you in your profession?

    c) Have you ever observed activity that you would consider to be leadership occurring without a single, identifiable 'leader'? What did that look like?

5) Given your own experience with leadership, where would you place your work on the attached continuum? (See below)

    a) Do you always lead in the same way? If not, tell us more about why.

    b) Does it take any particular skill, and can you offer an example.

Questions Related to Heritage Leadership:

6) What are some of the barriers you can identify in the process of heritage leadership?

    a) What would be needed to overcome these barriers?

    b) Can you elaborate on a personal example of overcoming a barrier?

10) Do you believe the concept of heritage leadership is recognized or understood currently? Why or Why not?

    a) In what areas of heritage work is leadership most needed today? In years to come?

Green Cogs: Meaning Making & Social Emotional Competencies

Meaning Making	Developing Relevancy	Meaning making can be used to generate connection to between tangible and intangible heritage and individuals.	(Harvey, 2001) (Simon, 2016)
	Encouraging Action	Meaning making can lead to protective actions including developing policy around heritage.	(Waterson, Smith & Campbell, 2006)
	Personal Reflection	Purposeful meaning making can improve critical thinking skills and develop increased empathy.	(Schaff, Isken & Tager, 2011)

Social Emotional Competencies	Effective and Compassionate Communication	Competencies include empathy, compassion, and service to the greater good.	(Boyatzis, 2008) (Brundiers & Wiek, 2017) (Sharma, 2017)
	Relationship Building	Competencies include relationship orientation and management, which includes teamwork, dialogue with stakeholders, and coalition-building.	(Boyatzis, 2008) (Sharma, 2017) (Shum, Gatling, & Shoemaker, 2018)
	Systems Thinking	Mastery includes systems-thinking competence as well as interpersonal competence.	(Wiek, Redman, & Mills, 2011)
	Development of Self	Advanced continuous learning and preventative self-care are part of the range of competitive professional skills.	(Brundiers & Wiek, 2017) (Shum, Gatling, & Shoemaker, 2018)

Questions Related to Meaning Making:

1) Tell us a little about what you do and why you chose to do this work.
      a) What has been the path that led you to your current role?
 	
7) What does the concept of "meaning making" mean to you in your profession?
      a) How does meaning making contribute to achieving certain aims within heritage leadership, and how can we best capitalize on or enhance this process?
      b) Does it take any particular skill, and can you offer an example.

Questions Related to Social Emotional Competencies:

8) What does the concept of "soft skills" or "social emotional competencies" mean to you in your profession?

      a) Please list and define a few of the most important of these skills

      b) How do effective interpersonal skills (soft skills) apply to the work of heritage leaders?

9) If you were to start out in your profession again, what skills and abilities do you wish you could have gained at the start of your career to help you be more effective as a leader?

      a) What advice would you offer individuals currently entering the field.

Appendix F: Master Code List

Master Code List
List of Codes -Parent codes in Bold (Code Use Frequency)

Heritage (106)
Intangible (22)
Participant Definition (76)
Tangible (23)
Heritage Leadership (315)
Challenges (296)
Failure to understand value (29)
Resources (31)
Formal Education (68)
Pedagogy (20)
Fortuitous Accident (40)
Identified Heritage Leaders/Positions (68)
Informal Education (65)
Interpretative Practice (98)
Mission Driven (69)
Understanding of the Term (108)
Leadership (383)
Boundary Spanning (22)
Change Management (40)
Consensus Building (78)
Definition of Leadership (98)
Follow Through (18)
Hard Skills 64)
Business Management Skills (34)
Policy Enforcement (10)
Valuation (22)
Importance of Leadership (46)

Integrity (14)
Lack of Leadership (29)
Partnerships (10)
Pragmatic (23)
Problem-Solving & Solutions (78)
Serving (55)
Situational (71)
Trust (15)
Meaning Making (195)
Connection to Place (52)
Meaningful Experiences (73)
Participation (49)
Passion (71)
Relevancy (98)
SECs (365)
Agility (33)
Behavior Modification (12)
Coaching (13)
Collaboration (57)
Communication (145)
Language Use (14)
non-verbal (2)
Conflict Management (50)
Creativity (23)

Cultural Competence (43)
Empathy (85)
Gratitude (1)
Human Centric (129)
Humor (4)
Inclusivity (36)
Lifelong Learning (52)
Listening (63)
Mentoring (24)
Moral Standards (24)
Responsibility (32)
Perspective-Taking (95)
Resilience (24)
Risk (42)
Self-Awareness (91)
Critical Reflection (49)
Self-Management (15)
Self-care (12)
Sensitivity (42)
Tenacity 48)
Vulnerability (15)
Ways of Thinking (62)
Forward Thinking (98)
Strategic Thinking (25)
Systems Thinking (43)
Worth (30)

Appendix G: IRB Approval Letter

Office of Research Administration

One University Boulevard
St. Louis, Missouri 63121-4499
Telephone: 314-516-5899
Fax: 314-516-6759
E-mail: ora@umsl.edu

DATE: November 13, 2018

TO: Tonia Herndon
FROM: University of Missouri-St. Louis IRB

PROJECT TITLE: [1333200-1] Heritage Leader Definition
REFERENCE #:
SUBMISSION TYPE: New Project

ACTION: APPROVED
APPROVAL DATE: November 13, 2018
EXPIRATION DATE: November 13, 2023
REVIEW TYPE: Expedited Review

REVIEW CATEGORY: Expedited review category # 7

The chairperson of the University of Missouri-St. Louis IRB has reviewed the above mentioned protocol for research involving human subjects and determined that the project qualifies for expedited review under Title 45 Code of Federal Regulations Part 46.110b. The time period for this approval expires one year from the date listed below. You must notify the University of Missouri-St. Louis IRB in advance of any proposed major changes in your approved protocol, e.g., addition of research sites or research instruments.

You must file an annual report with the committee. This report must indicate the starting date of the project and the number of subjects to date from start of project, or since last annual report, whichever is more recent.

Any consent or assent forms must be signed in duplicate and a copy provided to the subject. The principal investigator must retain the other copy of the signed consent form for at least three years following the completion of the research activity and they must be available for inspection if there is an official review of the UM-St. Louis human subjects research proceedings by the U.S. Department of Health and Human Services Office for Protection from Research Risks.

This action is officially recorded in the minutes of the committee.

If you have any questions, please contact Carl Bassi at 314-516-6029 or bassi@umsl.edu. Please include your project title and reference number in all correspondence with this committee.

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