#Leadership: Leading an Industrial Age Organization

in the time of Social Media

By

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A Thesis presented to
The University of Guelph

In partial fulfilment of the requirements
for the degree of
Doctor of Philosophy
in
Management

Guelph, Ontario, Canada

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ABSTRACT

#Leadership: Leading an Industrial Age Organization in the time of Social Media

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The pervasive growth of social media over the past 10 years has impacted how we communicate, how we share information and how we relate to one another. Communication, information sharing and relationships are all integral parts of leadership. The question is: how do we lead now that social media is a part of our lives and organizations? This exploratory study examines how leadership is conducted in a contemporary organization with industrial age roots where social media is present. Using a qualitative approach, the leader-follower relationship is explored through the perspectives of the leaders and followers in a context of major change to determine what part social media played in the decision-making, relationship, and sensemaking activities within the organization. In this instance, the knowledge and 'mature' use of social media (and other means of communicating) were managed effectively by the leadership to maintain the trust of the followers and retain the role of sensemaker for the organization. The potential negative impacts of unfettered use of social media were mitigated by a number of factors. Implications for leadership and future research are discussed to generate discussion and further exploration of the relationship between social media and leadership.
Dedication

This thesis is dedicated to my wonderful wife Jackie who supported, pushed, cajoled and drove me through this journey of learning.
Acknowledgements

A work of this magnitude is never accomplished without the help of others. I wish to acknowledge and thank a number of people who have contributed significantly to the completion of this PhD thesis:

First, the members of my committee for their excellent support and insights, Dr. Serge Desmarais, Dr. Davar Rezania, Dr. Eric Ouellet - and most of all, my advisor and friend, Dr. Michele Bowring who provided me with enough rope to range but never enough to hang myself. Her knowledge, advice and guidance were invaluable in helping me reach the successful completion of this work. By answering my questions with questions you offered a unique style of leadership that fit me perfectly. As I've said before “I think we make a great team.” And to my friend and 'colleague-in-PhD', Kevin McDermott for always being there to listen, advise, and commiserate.

My family members who always offered encouragement and support throughout this seemingly endless journey. Mom and Dad for their unwavering belief in me (and their financial support), my son Daniel and my daughter Ashley who provide a reason to continue to embrace and demonstrate a commitment to lifelong learning.

The members of the Canadian Forces, the best military in the world, who willingly and openly participated and supported this study. Even after 30 years, you continue to surprise and excel in your adaptability and professionalism. I am proud to be associated with such an outstanding group of first-class individuals. Your story was a pleasure to tell, I hope I have done you proud.

Finally, and most importantly, my wife Jackie. Your unwavering belief in me and in this endeavour provided invaluable incentive to continue and to succeed. You were always there for me when I needed to vent, express, question or celebrate. Your contribution to this thesis is impossible to measure and it would not have been completed without your love, persistence, drive and support. Now, you'll have to get used to me hanging around again!
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CHAPTER ONE - INTRODUCTION

Background

During this research study, I uncovered countless stories, with more revealed each day, about how social media has impacted (positively and negatively) the lives and livelihood of people around the world. For example, in December 2013, Chip Wilson, the founder and chairman of yoga pants maker Lululemon Athletica, resigned as chairman of its board of directors after he "ignited a social media maelstrom" (Harris, 2013) with his comments regarding customers' bodies.

In April, 2014 Brendan Eich, in the face of a media firestorm, voluntarily stepped down as CEO of Mozilla. The intense pressure from the press and social media made it difficult for Brendan to do his job as CEO and effectively run Mozilla. Upon his resignation, Eich stated: "Our mission is bigger than any one of us, and under the present circumstances, I cannot be an effective leader" and "Mozilla depends on the goodwill of its supporters more than most corporations do" (Mozilla, 2014). The interdependence of the leadership and organization on the "goodwill" of supporters, customers, followers – whatever moniker is attributed to those upon whom the success of an organization is dependent – is one aspect that makes social media so important today.

Another example of the power of social media can be seen in the use of YouTube by an individual speaking out against a large corporation. After witnessing a United Airlines luggage attendant tossing and breaking his guitar and case in 2008, Dave Carroll was frustrated by the bureaucracy and intransigence of the airline’s
policies and administrators. In July 2009, he posted a YouTube video chronicling the sequence of events. The video went viral, garnering over five million views in a few weeks (Cosh, 2009) and United’s share prices fell 10% within four days of the video being posted. The airline’s leadership had to do some very serious damage control and backtracking in an attempt to stem the backlash.

As I was watching the social movements gain traction in the Arab Spring in 2011 in Tunisia and Egypt, I was struck by the ubiquity and prominence of the mobile (smart) phone. At the same time, I was perplexed by the response of the governments in power in the affected countries. Did they not see or connect the importance of social media to their people? Why weren’t they manipulating or engaging with the people via this medium to influence their perspective and sway public opinion to a more positive view of the government? At the time, I was working on a paper discussing leadership and communication. I had a sense that there was a connection between what I was researching and what was happening in North Africa but I could not define it clearly. It was more than communication, although that was part of it ... but what more was at play here for the leaders and followers, and what part did social media play in the relationship between them?

Later, the pro-democracy protest and civil uprising in Syria, the riots in England, and the student protests in Quebec provoked me to wonder how social media had incited participation and sustained the movements beyond the localities in which they began. The video images used by Western media, supplied by “unconfirmed sources” within Syria were clear evidence of the power of the smart phone. Similarly, during the riots in England in August 2011, CBC News reported “Blackberry Messenger was used
to encourage people to join the unrest” and “youths used text messages, instant messaging on their BlackBerrys and social media platforms such as Twitter to coordinate their attacks in London and stay ahead of police” (CBC, 2011). In Quebec, as the students protested tuition hikes, the media continually highlighted how the use of social media and the ever-present smart phone was central to how the students organized and how they managed their message. As these incidents continued to unfold, combined with more stories of corporate leaders and companies using and misusing social media for ill or gain, the idea for this study began to crystallize.

A common thread that ties these aforementioned social movements together is the use of social media as a primary method of communication and information sharing (Lim, 2012). Through social media and social networking, these disparate populist movements gained momentum and support (cf. Kirkpatrick, Sanger, Fahim, El-Naggar, & Mazzetti, 2011). In each instance, the functioning leadership was not an integral part of the social network that fueled the movements. And in each instance, the leadership had to adapt or face some very undesirable consequences.

Suffice to say, the contemporary context linking leadership and social media is tangled, complex, and fractured. As the evidence mounted, it became clear to me that social media has the power to impact not only communications, but relationships as well. I was interested in one relationship in particular: the one between leader(s) and followers. To explore how this relationship evolves in a context where social media is available, I considered ways in which people use social media technology in everyday life.
The use and growth of social media has been exponential over the past decade and its capabilities continue to expand. “During the past 10 years, hundreds of millions of Internet users all over the world have visited thousands of social networking sites and social media sites” (Kim, Jeong, & Lee, 2010, p. 215). In January 2009, Facebook had 175 million users; in December 2014, Facebook exceeded 1.39 billion members, growing over 20% during the previous year (Facebook, 2015). People are using social media to communicate, to share information, and to build and maintain relationships (Li & Bernoff, 2011) and its use is widespread, not confined to only the social sphere but in business and organizational contexts as well (Hanna, Rohm, & Crittenden, 2011). Thus, it warrants investigation because as Rand (2013) advises “Today’s businesses can’t just use social media; they have to become social businesses, inside and out and from top to bottom” (p. x).

The significance for leadership is that social media can facilitate connections that affect the leadership relationships between the leaders and the followers, and between the followers, within an organization (Li & Bernoff, 2011). The rapid growth of social media and its permeation into contemporary organizations makes it vital that the leadership within organizations of all types become aware of and begin to maximize the opportunities and to minimize potential harm offered by this internet-based form of communication (Li, 2010). As Kaplan and Haenlein (2010) posit “[s]ocial media represent a revolutionary new trend that should be of interest to companies operating in online space—or any space, for that matter” (p. 59). Social media is a part of our new reality, and leaders are well advised to consider its potential and include this in developing their leadership approaches and strategies.
The connection between social media and leadership may not be intuitively apparent; however, if we consider the following definitions of leadership the connections become more evident. These leadership definitions are particularly helpful in highlighting the connection between leadership and social media and will be discussed in more detail later in this dissertation. They provide a contextual basis from which I will consider how leadership is accomplished in the context of social media:

Leadership is an influence relationship wherein leaders and collaborators influence one another about real changes that reflects their mutual purposes. … Collaborators develop a relationship with leaders of their own choosing, not necessarily those who have authority over them. Leaders and collaborators may change places. There may be a number of leadership relationships in one organization, and the same people are not necessarily the leaders in these different relationships (Rost, 1993, p. 134).

... leadership is co-constructed, a product of socio-historical and collective meaning making, and negotiated on an ongoing basis through a complex interplay among leadership actors (Fairhurst & Grant, 2010, p. 172)

Rost’s definition of leadership and the associated dynamics of the relationships provide insight into how leadership actually unfolds in organizations. With the introduction of social media into organizations, followers (or collaborators, as per Rost) have unfettered access and ability to develop relationships and the dynamism and quality of their relationships may be affected by the connectivity offered through social media (Sievert & Nelke, 2011). Fairhurst and Grant’s (2010) perspective emphasizes the interactive nature of the leadership relationship and how the actors’ perspectives play a key role in determining the quality of the leadership. Recent research has shown...
that social media influences perceptions (Dimitrova & Bystrom, 2013; Hwang, 2012; Kane, Chiru, & Ciuchete, 2012; Stavrositu & Kim, 2014) and it follows that this could affect the relationships inherent in leadership. The aim of this study is to determine how leadership is accomplished in an environment in which social media is readily available – that is, in just about every contemporary organization.

The term “contemporary organization” requires some clarification as I use it in this dissertation. I apply the word contemporary more in the sense of “present-day” or “existing” and less to describe the organization as “modern” or “up-to-date”. This is an important distinction as I have deliberately chosen to conduct my study in an organization that was formed in the industrial age, that is, the Canadian Forces (CF). This was done because I expected that such an institution, with its long-established protocols and processes of communication and information sharing combined with a more traditional\(^1\) sense of leaders and leadership would find adapting to the introduction of social media challenging. Barkema, Baum, and Mannix (2002) speak to this phenomenon in their discussion on technology and globalization and its impact on management and organizations and is suggested in their observation, “As environments change, however, the time- and history-dependent capabilities developed in the past can impair firms' ability to respond to new threats and opportunities” (p. 919). This notion is extended to the military by Lawson (2014) when he considers the challenges of introducing social media as new information and communication technology (ICT) in the US military arsenal. I delve deeper into these contextual aspects of the study later in this introductory chapter. Focusing on an ‘industrial age’ institution in a contemporary

\(^1\) I use the term “traditional” here to denote a widely-held perception of military leadership that is primarily directive, leader-centric, and based on control and power by an individual
setting, enabled me to study the leader-follower relationships as they unfolded in a context where social media is now an option that was not a part of the previously established protocols, processes, and relationships.

In essence, an organization is an established, interconnected network of relationships (cf. Kogut & Zander, 1992; Rowley, 1997). The ability of the followers to relate and share information has the potential to affect these relationships and alter the saliency of a particular follower by affecting any or all of their relative power, legitimacy, and/or urgency (Agil, Mitchell, & Sonnenfeld, 1999; Mitchell, Agil, & Wood, 1997). While followers have always had the ability to affect their relationship with the leaders of an organization, with social media they now have the ability to gather more difficult-to-access information and they have the capability of sharing and framing that information to further their particular agenda for a wider or for a specific audience (Kim, et al., 2010; Li & Bernoff, 2011). As Solis (2010) eloquently offered “Social media spark a revelation that we, the people, have a voice, and through the democratization of content and ideas we can once again unite around common passions, inspire movements, and ignite change” (p. 54).

Through conversations (via social media or otherwise), followers construct a social reality (Berger & Luckman, 1966; Fairhurst & Grant, 2010) that can reinforce or undermine organizational relationships (including leader-follower relationships), depending on how information is presented and/or interpreted. As Fairhurst and Grant (2010) offer “communication becomes more than a simple transmission; it is a medium by which the negotiation and construction of meaning takes place” (p. 174). By sharing perspectives and seemingly disparate pieces of information, followers, now connected
through social media, can develop their own sense of the environment and consequently impact change initiatives and/or other environmental factors that affect organizations in a tangible way (Kossonen & Ellonen, 2009). Leaders, as part of the established relationships of an organization, have a vested interest in ensuring that the interpretation of the information conveyed by social media is not counter-productive to organizational aims (Sievert & Nelke, 2011). The question is, how do they do this?

**Research Questions**

In this study I investigate how leadership and its inherent relationships are enacted in an environment in which social media exists. To accomplish this, I have chosen an institution, the Canadian Forces, which was established in the industrial age and is now striving to continue operating at a consistently high level in the 21st century where social media is ubiquitous. Focusing on the leader-follower relationship, I consider important aspects of the daily connections extant in this organization to determine how they are conducted when social media is available. To do this, I focus on one primary research question, complemented by three secondary questions.

**Primary Question:** How is leadership conducted in the context of social media?

**Secondary Questions:**

1. How is the communication and information flow within an organization conducted in the context of social media?

2. How is the influence dynamic within the leader-follower relationship realized in an environment where social media is readily available?
3. How are participants’ perceptions of others within the leader-follower relationship affected by presence of social media?

**Structure of This Dissertation**

In this dissertation, I examine how the leader-follower relationship is conducted in the context of social media in a contemporary organization. Following this introduction in which I provide contextual background for the study and a focus through defining the primary and secondary research questions, I explain the study scope, limitations and context. This is followed by a review of the relevant literature which informs the study. For this, I initially focus on the leadership literature as it pertains to relationships, influence, and communication and follow that with a review of the growing body of literature on social media as it refers to the same aspects of relationships, influence and communication. This review exposes the gap this study is intended to fill through addressing the research questions.

The literature review is followed by a description of the methodology and my approach to the research. This includes the ontological and epistemological positioning and the rationale for the qualitative, quasi-grounded theory exploratory approach that I used in this study. It also describes the context, participants and situation in more detail and the methods used in gathering the data.

The ensuing chapter, Data Analysis, provides an explanation of how the data was coded and categorized into six meaningful themes that offered more focus for the analysis. The general and specific findings are explored in detail using the data gathered in the interviews, observations and document review. The discussion of the
findings is then offered and it presents an analysis of the data as it relates directly to addressing the primary and secondary research questions.

This leads to the concluding material which provides a synopsis of each chapter and the main conclusions of the study. It also offers some reflections and insight into my personal journey during this study. I then discuss how these findings add to or extend our understanding of contemporary leadership. Implications and considerations for future research are presented by way of conclusion.

**Scope And Limitations**

Describing the scope and context of this study will help define what it explores and perhaps more importantly, what it does not. Since there are so many perspectives on leadership (see Bass, 2008), to situate research in this field it is important to articulate the leadership perspective I used in the study. Similarly, it is helpful to describe and define the key terms and describe the context of the study to clarify the approach and aims with more precision. This section provides these foundational pieces for this study by presenting the definition of leadership, relationships, and social media used in the study. It also provides a description of the context in which the study was conducted.

**Leadership**

Many researchers have sought to refine and capture the myriad conceptualizations of leadership in a definitive classification (see Bass, 2008; Rost, 1993). Stogdill’s (1974) statement that “there are almost as many definitions of leadership as there are persons who have attempted to define the concept” (p. 7) was
prescient in that it continues to hold true today. Dian Hosking in her 1988 argument for a social-psychological perspective of leadership offered that:

...three elements seem common to most conceptualizations [of leadership]. First, leadership is a fundamentally social phenomenon, and some form of social interaction, usually face-to-face, is required. Second, leadership has the effect of structuring activities and relationships, and related sensemaking processes. Third, to be defined as a leader, a participant must be perceived as salient, relative to others; in particular, they will be recognized as of higher status in terms of their contributions to influence. (p. 152)

Each of these conceptualizations pertains to the perspective of leadership used for this study.

One definition that captures the essence of many perspectives on leadership was offered by Rost (1993): “Leadership is an influence relationship wherein leaders and collaborators influence one another about real changes that reflects their mutual purposes” (p. 134). While this is by no means a universally accepted definition of leadership, it is used in this study because within this statement reside the core elements of the leadership process. That is, leadership is a relationship involving influence between leaders and followers (collaborators).

Leadership research by Fairhurst and colleagues (Fairhurst, 2010; Fairhurst & Grant, 2010; Fairhurst & Uhl-Bien, 2012) highlights the perspective that leadership is a socially constructed phenomenon. As mentioned above, Fairhurst and Grant (2010) posit that “leadership is co-constructed, a product of socio-historical and collective meaning making, and negotiated on an ongoing basis through a complex interplay among leadership actors” (p. 172). Social media offers new and effective means to co-
construct collective meaning making and facilitates the complex interplay among the actors. Thus, the social construction perspective of leadership forms a foundational element of this study. This study considers the current literature on these core elements of leadership and provides additional insights into the process of leadership in a contemporary context.

**Relationships**

Similarly, there are many interpretations of the term relationship. Since much of the leadership research assumes an understanding of what is meant by the term ‘relationship’ and does not explore it in depth, I provide the perspective I take in this study here, so when I discuss the leader-follower relationship, the use of the term is clear.

Attempting to define relationship is akin to trying to define leadership. However, in turning to the social psychology literature I was able to derive a foundational perspective on relationships from the work of Hinde (1979) wherein he describes the two fundamental aspects of a relationship as: “intermittent interaction between two people, involving interchanges over an extended period of time” and having “some degree of continuity between successive interactions” (p. 14). Baldwin (1992) considers relationships from a cognitive perspective, wherein these interactions influence, and are influenced by the actors’ perceptions of reality and of the other in the interactions resulting in the social construction of a relationship. That is, the interactions are integrated through the perceptions and memories of the actors regarding past and present interactions and the consequent formation of expectations of future ones.
These interactions comprise the foundational elements of a relationship and it is within these interactions that the relationship develops. The primary form of interaction in a relationship is conversation and this is where the social construction of the reality for the actors occurs. Karp (2013) speaks to this when he connects this aspect of relationship to leadership:

What is interesting, leadership-wise, is how people develop and sustain certain ways of relating to each other in their conversations, and then, from conversations, make sense of their surroundings and themselves. Leadership thus arises from dialogic events, and may take the form of a relational construction among people involved in the conversations (p. 5).

Equally as important is the time between interactions where the parties in the relationship develop their perceptions of what has happened and their expectations for what will or should happen in ensuing interactions. Similarly, the quality and the content of the interactions have a direct impact on the strength and longevity of the relationship (Hinde, 1979). Dixson and Duck (1994) discuss the process of relationships and the associated symbols and meaning, and offer that, although relationships “are composed of individuals [they] are more than the sum of their parts” (in Duck, 1994, p. 176). This is essentially taking a systems approach in that they consider the relationship as more than just the actors involved but also their perceptions and perspectives, their interactions, and the context in which they occur as integral parts of the relationship (Reis, Collins, & Berscheid, 2000). It is the in the “sum of the parts” that the interesting elements for this study reside. I will delve deeper into this in the Data Analysis chapter when I discuss how the relationships were effected in the population under study. At this
point, it is sufficient to understand what I mean (or understand) by the term relationship as it is used in this dissertation.

Mary Uhl-Bien, in her 2006 proposal for Relational Leadership theory provides a thorough examination of two prevailing perspectives of relationships; entity and relational. For this study, an entity perspective of relationships will be used. This perspective “views relational processes as centered in individuals’ perceptions and cognitions as they engage in exchanges and influence relationships with one another” (Uhl-Bien, 2006, p. 655). This is the more traditional view of a relationship in which the process of connection between the actors (or entities) is “considered relative to individual characteristics that leaders and followers bring to their interpersonal exchanges” (Uhl-Bien, 2006, p. 656).

**Social Media**

Social media, also called social websites and social networks are a rapidly growing, ever-changing system of connectivity enabled through the world-wide web. With the advent of Web 2.0, internet users became the authors of their social networks and their own social reality online via user generated content (Kaplan & Haenlein, 2010). While there are many definitions of social media and the related and associated forms and components (web sites, etc.) for the purposes of this study, the definition articulated by Kaplan and Haenlein (2010) will be used: “Social Media is a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content” (p.

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2 Web 2.0 is a term that was first used in 2004 to describe a new way in which software developers and end-users started to utilize the World Wide Web; that is, as a platform whereby content and applications are no longer created and published by individuals, but instead are continuously modified by all users in a participatory and collaborative fashion (Kaplan & Haenlein, 2010, pp. 60-61).
This definition includes such popular types of social networks as Facebook, MySpace, Orkut, Friendster, messaging applications like Twitter, and other forms of connectivity such as YouTube, virtual worlds, Flickr, wiki, blogs, vlogs, for example.

Kaplan and Haenlein (2010) go on to classify social media into six distinct categories which have been widely adopted (Lim, 2012). The categorization of social media formats was done according to their social presence, media richness, self-presentation and self-disclosure (see Table 1). In this study, the focus was on social networking sites. This medium was chosen because of its combination of widespread use, high degree of self-presentation and self-disclosure, and the medium level of richness and social presence. A more detailed description of these factors follows in the ensuing sections of this dissertation. These factors are significant when considering the leader-follower relationship in the chosen context.

<table>
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<th>Self-presentation/ Self-disclosure</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
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</thead>
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<tr>
<td>High</td>
<td>Blogs</td>
<td>Social networking sites (e.g., Facebook)</td>
<td>Virtual social worlds (e.g., Second Life)</td>
</tr>
<tr>
<td>Low</td>
<td>Collaborative projects (e.g., Wikipedia)</td>
<td>Content communities (e.g., YouTube)</td>
<td>Virtual game worlds (e.g., World of Warcraft)</td>
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(Kaplan & Haenlein, 2010, p. 62)

**Figure 1 – Social Media Categories**

**Context**

In 2000, the Academy of Management annual meeting focused on emerging trends in organizing and management and highlighted the challenges of using traditional approaches in management scholarship and practice to address and understand these
new trends and developments. In essence, they were observing the transition into what has been coined ‘the information age’ and the concomitant changing nature of firms into complex, innovative, information-dependent, knowledge-based entities (cf. Hitt, 1998). This is in contrast to ‘industrial age’ organizations that were established in an era when information and knowledge were much more closely and easily managed. Schneider (2002), in proposing her stakeholder model for leadership discusses the transition to the information age by describing how organizations are moving away from bureaucracy to different structures that address the transformative changes driven primarily by globalization and technology. There are many and varied terms used to describe these new organizations and their structures (see Child & McGrath, 2001). Most refer to the level of bureaucracy or hierarchy inherent in the organization and the associated ability of the organization to adapt to changes. The information age presents a challenge to bureaucratic institutions and organizations as technology enables and demands a shift to rapidly dealing with information and knowledge and this “has altered the nature of organization dramatically and shifted the basis of competition” (Barkema, Baum, & Mannix, 2002, p. 918).

A prototypical bureaucratic institution can be seen in the government or military. These bureaucratic institutions were established in the industrial age and developed practices and policies that were effective and reflective of that era. This includes the leadership styles and approaches that were developed and practised for those contexts. By that I mean, leadership that was based on the notion of power and control the management of information. It tended to be more directive, and less inclusive. Decisions were made without consultation with subordinates. The higher a person was in the
hierarchy, the more information they were privy to, and consequently the more power they had. Leadership was often appointed by virtue of position and emergent leadership was rare. Through control of information and resources, leaders maintained their power and position.

However, the information age requires different leadership because the effectiveness of leadership is context-dependent, the changing context of the information age necessitates a different approach to leading (Osborn, Hunt, & Jauch, 2002; Schneider, 2002; Uhl-Bien, Marion, & McKelvey, 2007). The introduction of social media changes the context even more dramatically, and it follows that leadership must adapt to this new entry into the organizational context. How effective leadership is accomplished in this 'new' context is what this study seeks to discover.

As social media inherently implies, creates, and requires an 'open' environment where information is shared widely and rapidly (Li, 2011), it was anticipated that the impact of social media in a prototypically 'closed' information environment would be most readily discernible. As described, one such environment may be found in a bureaucratic, military institution. Despite recent changes to military perspectives on information, the management and control of information remains a key element in military environments widely known for the close control of information and their hierarchical relationships (Lawson, 2014). For this reason, in this study, I chose to use the Canadian Forces (CF) as the venue for research as I anticipated that how information is handled in the context of social media would be readily discernible and would highlight the challenges of leading in a context of social media.
I anticipated that the impact of social media would be evident in the artifacts of the culture of the CF; that is, the communication processes and policies, the information environment, the relationship between the leaders and the subordinates, and the formal and informal communication methods and content that emerges due to access to, and use of, social media. Exploring how accessibility to information and “individuals' perceptions and cognitions as they engage(d) in exchanges and influence relationships with one another” (Uhl-Bien, 2006, p. 655) in a context of social media provided insight into how the leader-follower relationship is maintained in a contemporary organization with roots in the industrial age.

Beyond the uniqueness of the military context, this study took place primarily on the NATO Airbase at Geilenkirchen in Germany. NATO Airbase Geilenkirchen is comprised of approximately 2000 military and civilian personnel from 16 different NATO nations. The purpose of the airbase is to support and execute the mission of the NATO Airborne Early Warning and Control Force (NAEW&CF). The NAEW&CF is a unique program in which 17 nations (of the 28-member NATO alliance) contribute to maintaining and operating an airborne early warning capability implemented by the E-3A Airborne Warning and Control System or AWACS aircraft. Canada was a founding member and has been an integral contributor and actor in the NAEW&CF, maintaining a relatively significant force of over 100 military personnel in Geilenkirchen since the inception of the NAEW&CF in 1982.

The research focused on how the leader-follower relationships were conducted in a social media context during a time of major change. In May 2011, the Canadian government announced it was withdrawing its support (and personnel) from the
NAEW&CF. Canada was the first nation to ever withdraw from the program. The decision to withdraw had a major impact on the lives of the servicemen and servicewomen who were serving in GK (This is explained in detail in the Data Analysis section – General Findings).

The Canadian contingent in NAEWF (CCNAEWF) was itself in a very unique situation. They served Canada under a NATO banner on an airbase in Germany. This meant that they “served two masters,” having to answer to and abide by national regulations and policies while completing a NATO mission with its own (and sometimes conflicting) priorities, rules, processes and procedures. Each member of CCNAEWF had two bosses – a Canadian and a NATO one. The relationship under study here was the one involving the Canadian leadership.

From anecdotal information and observation, it was evident to me that the use of social media was prevalent within this group of CF members. Social media provided a conduit through which to pass information and remain in contact. However, it was not evident what content was being transmitted as I was not a member of their Facebook community.

Of particular significance to this study, in May 2011, the government decision to withdraw from the NATO AEW&C Force was unexpected by many and its impact was momentous for those involved. Leading during this time of major change was a challenge. The situation also offered an opportunity for social media to play an important part in defining how the members of the contingent made sense of their circumstances. The combination of a readily definable, easily accessible group undergoing a significant change in an environment where social media was a primary
means of communication offered a singular, real-life opportunity to study how social media is used and how the leader-follower relationship is maintained in a context where social media is involved.

The preceding introduction, definitions and context provide the background, scope and parameters for this study, especially from an operational perspective. It is equally vital to situate the study within the different disciplines of literature in order to understand how the research questions were developed, how the data was analysed, and where the findings contribute to the existing literature. In the next chapter, I review relevant literature on leadership and social media with a particular focus on how it connects to elements of the leader-follower relationship (i.e., communication, information sharing and relations).
CHAPTER TWO - LITERATURE REVIEW

Introduction to Literature Review Chapter

It is important to establish the theoretical framework and methodological focus of this study through a purposeful review of relevant literature. In this chapter, I review the research that examines the approach of considering leadership as a relationship. I then evaluate why this is important to understanding leadership. Specifically, I ask what is important within the leader-follower relationship that is critical to the process of leadership. In my research I determined that two elements and aspects of the relationship are critical to leadership, trust and influence. A critical review of the leadership literature provides an informed perspective that describes how and why these aspects and elements are important to the relationship, to the leader and to the process of leadership.

I then consider whether this perspective holds true in the contemporary organization, that is, one where social media is present. In order to appreciate the impact of social media on the established elements and aspects of the leader-follower relationship, I examine the literature relevant to social media and relationships in general. From this review, I provide a scholarly perspective that illustrates how relationships are conducted in the context of social media. Extending this understanding to leadership begs the question ‘if social media affects relationships, how then is the leader-follower relationship in the contemporary organization conducted when social media is present’? This, it turns out from a review of extant literature, has not been explored.
As my primary interest is in leadership, I will start with an examination of the important research within that expansive field of study. Specifically, I focus on those elements of leadership that pertain to leadership as a relationship, communication and information sharing between the leader and follower. These elements help to describe the process and the interdependence of the actors (cf. Fairhurst & Connaughton, 2014; Wittenbaum & Park, 2001). Through an examination of leadership as a relationship I will draw out the importance of influence and perception as it pertains to trust and meaning making (or sensemaking) in the relationship and then I will show the role that communication and information sharing play in making the relationship work. By examining these elements in more detail, this study provides a deeper appreciation of how they contribute to the leader-follower relationship, how they connect with and are impacted by social media, and how leadership is conducted in contemporary organizations where social media is a factor.

The term relationship itself requires investigation and connection to leadership. The extensive research on relationships generally supports the perspective that, in essence, relationships are sequences of interactions between the parties who have intermittent contact over a period of time (cf. Duck, 1993; Hinde, 1979). These interactions influence the participants’ perceptions of reality and result in the social construction of a relationship (Baldwin, 1992). Adding specificity to the terms in these perspectives is what constitutes the discussion and debate that seeks to precisely define the term ‘relationship’. One such instance is in the work of Reis, Collins, and Berscheid (2000) regarding the interactions in relationships wherein they describe influence as “the defining hallmark of interaction” (p. 845) citing earlier work by
Berscheid and Reis (1998). This is important because as I will show, influence has been closely connected with leadership (e.g., Bass, 1999; Uhl-Bien, 2006; Yukl, 2013) and it is this common connection that links leadership and relationships. Similarly, trust has been identified as a key element of effective relationships (McAllister, 1995; Rempel, Holmes, & Zanna, 1985) and of effective leadership (Bass, 1999; Dirks & Ferrin, 2002). Both influence and trust in relationships are effected through communications and through the sharing of information (Butler, 1999; Mohr & Spekman, 1994). It is these connections that provide the focus for the first part of this review.

The aim of this study is to determine how leadership, with a specific focus on the relationship between the leader(s) and follower(s), is accomplished in a 21st century organization, considering the introduction of social media technology. Consequently, in the second part of this chapter I will provide a review of the literature on social media, and its relevance and connection to relationships and then to the leader-follower relationship. I will review the literature that describes social media as it pertains to relationships in the contemporary organization and then analyse the research that considers social media as a means of communication, as an information source and as a relational tool. These aspects of social media are of particular interest as they are directly connected with influence (Hovland & Weiss, 1951; Korsgaard, Schweiger, & Sapeinza, 1995; Sagie, Zaidman, et al., 2002) and beyond social media, they have been linked to the effective implementation of leadership (Fairhurst & Connaughton, 2014; Graen & Uhl-Bien, 1995; Wittenbaum & Park, 2001). By demonstrating this connection, this review will provide a sound theoretical basis for conducting this study and expose lacunae that may be addressed by the research questions.
Equally important is to describe the limits and scope of this review. The burgeoning body of knowledge and research on social media touches upon a multitude of topics and disciplines as social media becomes ubiquitous in today's global village. It would be impossible to examine social media in all the areas where it has had an impact. Consequently, I will focus my review on social media and social networking sites (SNS) as they pertain to communication, information exchange and relationships in the 21st century organization. To an even greater extent, the body of knowledge on leadership is expansive. Therefore, I will restrict my review of the leadership literature to studies and perspectives focused on relational leadership and associated areas of trust, influence, communication, and the exchange and control of information as it pertains to the leader as sensemaker.

Although these two areas of study, social media and leadership, offer a large array of research and theorizing, there is very little literature that considers both in the same context and none that looks specifically at the how leadership is accomplished in a social media context. This study offers a unique perspective in that regard.

**Leaders, Followers and Relationships**

In 1989 Micha Popper wrote, “The *sine qua non* of leadership is followership” (p. 370 as cited in Rost, 1993, p. 81). However that perspective on leadership has not always been prevalent in how we approached leadership. In 1959, in an article titled *The Leader-Follower Relationship* T.E. Stephenson wrote that there were two main perspectives on leadership – one that regarded leadership as a social process wherein leadership was seen “as two-way process in which the leader influences and is influenced by his followers but 'influences more than he is influenced'” (p. 179) and the
second that defined leadership as a set of personal characteristics or traits. Interestingly, it was the latter that gained traction and guided the majority of leadership research through most of the next two decades (see for example Blake & Mouton, 1964, 1978; Hersey & Blanchard, 1969; Stogdill, 1974).

The work on Leader-Member Exchange (LMX) theory by Graen and colleagues in the mid-1970s (Dansereau, Graen, & Haga, 1975; Graen, 1976; Graen & Cashman, 1975) was one of the efforts that reenergized the ‘other’ perspective on leadership and refocused research on leadership to consider it as a process centred in the interactions or relationships between followers and leaders. LMX theory offered that leaders develop relationships with the members of their group and that the quality of these relationships can differ depending on the relative status of the individual. The quality of the relationship was determined reciprocally in that the more the follower’s behaviours and performance aligned with the expectations and requirements of the leader, the higher the quality of the relationship. Higher quality relationships, from a leadership perspective meant greater influence, and further opportunities to strengthen the relationships through increased interaction (Dansereau, et al., 1975). This generated research on a number of fronts to determine how the different variables affected the quality of the relationship (e.g., Liden, Wayne, & Stilwell, 1993; Phillips & Bedeian, 1994).

Taking the perspective of leadership as a relational process in a slightly different direction, James MacGregor Burns (1978) in his volume Leadership viewed leaders and followers as parties in an influence relationship where the leader sought to use the motivation of the followers to achieve mutual goals. Burns discusses the limited power of leadership as an aspect of the relationship wherein the leader arouses the
motivations of the follower through the power they have acceded to the leader. This was much different than the widely accepted view of ‘leader as controller’ and transactional leadership in which a follower completed a task in return for a reward from the leader. Burns described this type of leadership as “transforming leadership” which “occurs when one or more persons engage with others in such a way that leaders and followers raise one another to higher levels of motivation and morality” (Burns, 1978, p. 20). The relationship between the leader and follower is critical to transformational leadership, and the resultant extensive research on transformational and charismatic leadership has extended our understanding of the relational aspects of leadership (e.g., Antonakis, 2012; Bass, 1990; Conger, 1999; Shamir, House, & Arthur, 1993).

James Meindl’s (1995) romance of leadership perspective helped further shift the focus away from the leader by focusing on the follower as a key part of the leadership relationship. Taking the perspective that the leader-follower relationship is socially constructed, he proposed that the relationship relies on the followers’ perceptions and the other relationships within which the followers are involved. His follower-centric approach was a radical departure from the perspectives on leadership that had come before but it did provide further support for conceptualizing leadership as a relationship.

In 1999, Lord, Brown, and Freiberg extended the perspective of leadership as a relationship by examining the role of self-concepts within that relationship. Specifically, they explored followers’ self-concepts and how they are influenced by leaders and how that consequently impacts behaviour. They also discuss how this effect is reciprocal within the leader-follower relationship whereby the followers also influence the leaders’ self-concepts. They offered a theoretical framework for understanding leader and
subordinates self-concepts that has contributed to a number of significant studies, some of which are examined in more depth here (e.g., Avolio, Gardner, Walumba, et al., 2004; Howell & Shamir, 2005; Kark, Shamir, & Chen, 2003).

The view of leadership as a relationship was further developed by Kark, Shamir, and Chen (2003) in their examination of empowerment and dependence in transformational leadership where they discussed the leader-follower relationship as a key determinant of leader effectiveness. Their quantitative analysis of the mediating variables of personal identification and social identification concluded that “transformational leadership may prime both the relational self (evidenced by personal identification with the leader) and the collective self (evidenced by social identification with the unit)” (p. 254) thus extending the perspective on relationships from the dyadic to the collective. Popper (2004) provides a supporting argument for this more complex perspective when he posits that viewing leadership as a relationship offers a more integrative view that removes the focus from the leader and offers a more balanced understanding of leadership.

In 2005, Wang, Law, Hackett, Wang, and Chen extended Hinde’s (1979) description of relationships to the leader-follower relationship in their work on integrating transformational leadership and LMX theory when they described it as a “reciprocal process of dyadic exchanges that determine the quality of the relationship over time” (p. 421). Using a quantitative survey in China they determined that, based on perceptual data, transformational leadership behaviours affect the leader-follower relationships described under LMX theory. That is, the leader-follower relationship is influenced reciprocally by the behaviours of both parties.
The role of the follower in the relationship has also garnered considerable attention by academic researchers. Marion and Uhl-Bien (2001) discuss the importance of the follower from the perspective of complexity theory and suggest that follower behaviour is a critical element in the overall health of the system within which leadership is conducted. David Collinson (2006) talks about the role of the follower in contemporary organizations and how it has evolved into one of empowered knowledge managers and distributed decision-makers that are critical to an organization's overall success. His work on examining the impact of the leader on the followers' personal and organizational identities developed strong arguments for considering this element when studying the leader-follower relationship in contemporary organizations. Others have sought to (re)define what followership means, in light of our increased understanding of the leadership dynamic (Carsten, Uhl-Bien, et al., 2010). Their work revealed that followers’ social construction of their role and their consequent behaviour varies with context and that the ‘traditional’ perspective of follower as obedient servant is no longer widely held. Our growing understanding of followers and followership highlights the importance of the follower within the leader-follower relationship. The role of the follower is a key factor throughout this study and the findings provide further evidence to support the reciprocal nature of the relationship between leader and follower.

Uhl-Bien and Maslyn’s (2003) study which examined reciprocity in leader-follower relationships with a focus on equivalency, immediacy, and interest found positive and negative correlations between these factors and relationship quality. Mary Uhl-Bien (2006) continued the work on relationships and leadership, eventually developing her Relational Leadership theory in which she proposes considering the leader-follower relationship...
relationship from two perspectives; entity and relational\textsuperscript{3}. She views leadership as a process of social influence in which the relationship is key and her Relational Leadership Theory is offered as a framework for studying leadership using these complementary perspectives of the relationship.

Later, Campbell, Ward, Sonnenfeld, and Agle (2008) examined charismatic leadership by examining the leader-follower relationship. They provided further support for the reciprocal characterization of the leader-follower relationship when they found the interdependent nature of the relationship involved the sharing of information, resources and other supporting functions that defined the mutual reliance of the parties in an organization.

This synopsis of key research from the last 30 years provides scholarly support for viewing leadership as a relationship. From the foundational aspects of LMX theory to the relational leadership theories and research, our understanding of leadership as a process that occurs in the interactions (i.e., relationships) between the leader and follower has evolved over time. In taking the relational viewpoint on leadership, this study will contribute to shifting the focus of leadership study to consider all the elements of leadership: leader, follower, relationship, and context (as per Osborn, Hunt, & Jauch, 2002). As Popper (2004) states, taking “the perspective of leadership as relationship permits a view that is admittedly more complex but also more dynamic, and therefore more accurate” (p. 118). This is reflective of a wide segment of leadership scholars today. It also supports the approach I have taken in this study.

\textsuperscript{3} Of note, Uhl-Bien does not view these as contradictory or conflicting perspectives – rather she suggests considering multiple approaches will inform our perspectives on leadership in a more holistic manner. Although I am using the entity viewpoint in this study, my constructivist viewpoint is more aligned with the relational point of view, thus I remain open to both perspectives.
What is more interesting is not that it is a relationship but what occurs within the leader-follower relationship that impacts the effectiveness of the leader and strength of the bond between the leader(s) and follower(s). Insights can be drawn from the work of Graen and Uhl-Bien (1995) wherein they offered that central to LMX theory was the development of effective relationships between the leader and the followers. They argued that high-quality LMX relationships were predicated on higher-level social exchanges characterized by mutual trust, respect, and obligation. It is the elements of trust, respect and loyalty that are of particular interest for me in this study.

Brower, Schoorman, and Tan (2000) extended the research on trust and loyalty found a direct correlation between high LMX relationships and mutual trust, loyalty and other supporting behaviours within the relationship. Their research on the relational aspects of leadership led to integrating LMX theory with a model of trust from the work of Mayer, Davis, and Schoorman (1995) to propose a model of relational leadership that uses the trust a leader has in their subordinate to determine the quality of the relationship (the measurement can also be conducted reciprocally).

Uhl-Bien’s Relational Leadership theory (2006) is offered as a framework within which one can study leadership as a social influence process within the relationships inherent in the leadership process. From both the entity and relational perspectives, she sees leadership as “a relational process of social influence that contributes to the emergence of social order and new approaches, attitudes and goals” (p. 668). Here again, the term influence is connected with leadership and the associated relationships.

Further, in the Encyclopedia of Leadership (2004), the authors describe the characteristics of a strong leader-follower relationship as:
Good relationships were identified as those characterized by high levels of mutual trust, respect, and loyalty. Individuals in high-quality exchanges respect one another’s capabilities and competence. They have high levels of trust and can count on one another for support and loyalty when needed. More important, they are willing to communicate openly and honestly with one another. As a result, these relationships generate the mutual influence necessary for effective leadership (Goethals, Sorenson, & Burns, 2004, p. 1306)

Thus, mutual trust, influence, and open communication are important elements for examining the quality of the leader-follower relationship and I explore them further in the following sections.

The complexity and dynamic nature of taking a relational approach make it imperative to consider the organization under study as a configuration of relationships and not as a monolithic entity (Bradbury & Lichenstein, 2000). That is, to take a systems perspective. Returning to social psychology literature, Reis and colleagues (2000) posit that relationships are open systems in which energy, information, and material are exchanged between the myriad systems within the environment. They go on to state that:

In the study of relationships, the systems perspective would acknowledge that:

1. From the moment of conception, individuals are nested in social relationships that influence the nature and operation of the many hierarchically organized biological and behavioral systems each individual encompasses.
2. Each relationship is itself nested in a social environmental system and in a physical environmental system, which together represent each relationship’s ecological niche.
3. The specific ecological niche of each relationship is, in turn, embedded in larger societal and cultural systems (see, e.g., Levinger, 1994).

4. All of these systems are simultaneously evolving and influencing each other over time (p. 847)

The systems perspective reflects and respects the complexity and evolving nature of relationships. It is also reflective of the approach taken by some well-established leadership scholars (e.g., Fairhurst, Uhl-Bien, etc.) in considering the relationship and its dynamics as key to understanding the phenomenon of leadership. In order to understand the leader-follower relationships within an organization more fully, it is necessary to consider elements of the relationship that are central to leadership; trust and influence, and perceptions as they relate to sensemaking.

**Trust, Influence, and Perceptions**

**Trust**

Trust and reciprocity in relationships are considered keystone elements and their relative strength and mutuality are determinants of the strength of the relationship (Lewicki, McAllister, & Bies, 1998). They cite Rempel, Holmes, and Zanna (1985) when they describe trust as a cornerstone element of personal relationships. Rempel and colleagues’ work on trust in close relationships found that trust correlated to the success of close relationships through a number of aspects including faith, dependability, and predictability. Rousseau, Sitkin, Burt, and Camerer (1998) examined trust from the perspective of multiple disciplines including economics, psychology, and sociology. In their consolidation of a multidisciplinary view of trust, they define it as “a psychological
state comprising intention to accept vulnerability based upon positive expectations of the intentions or behaviour of another” (p. 395).

Dirks and Ferrin (2002) extend the conceptual definition of trust by considering it in two dimensions – cognitive and affective. In the cognitive dimension they consider issues such as reliability, honesty, fairness, and integrity as they relate to a persons' perception of the other in the trust relationship. The affective dimension is concerned with the relationship and reliance of one party to demonstrate concern for the welfare of the other in the relationship. This provides a method for analyzing trust from two perspectives and will be used in the Data Analysis chapter that follows.

Trust has been determined to reside within the perceptions of each individual (Sashkin & Williams, 1990) thus it falls within the scope of this study as I am looking at perceptions of leaders and followers within the context of their relationship. Tying trust to leadership, the work of Podsakoff and colleagues (1996) found that trust in the leader was strengthened when followers perceived the leader to be supportive and a good role model. They also found that leaders who provided personalized support and encouraged the accomplishment of team or organizational goals generated a higher perceived level of trust from their followers. Personalized support shows up as one of the four “I’s” in transformational leadership theories as Individualized Consideration (Bass, 1985). Higher trust in the leader also positively correlated to overall group cohesion within an organization. This is supported by Wright (2011) in her longitudinal study of attitudes of employees to managers, when she found that in contemporary organizations trust can be directly correlated to outcomes including behaviours, commitment, loyalty and performance.
In the leadership relationship, trust is generated as a result of actions on the part of each player (cf. Bass, 1999; Morgan & Zeffane, 2003; Whitener, 1997). That is, when the one partner in the relationship responds to a situation and their response meets the expectations of the other, the level of trust is heightened. For the leader and follower, this applies in both directions in the relationship. Sweeney, Thompson, and Blanton (2009) confirmed the reciprocal nature of trust in the leader-follower relationship and its positive impact on interdependence within the relationship.

The reciprocal nature of trust represents a critical aspect in determining the strength of the relationship. Rousseau and colleagues’ work on psychological contracts highlights reciprocity as a key part of the employee-employer exchange (cf. Robinson & Rousseau, 1994). Burke, Sims, Lazzara, and Salas (2007) take a ‘bottom-up’ view in their study of trust and leadership but do acknowledge that “trust is a reciprocal process that exists within and across organizational levels” (p. 607). Research by Lavelle, Rupp, and Brockner (2007) and others reinforced the importance of trust in determining the quality of the relationship between leaders and followers (e.g., Lewicki, Wiethoff, & Tomlinson, 2005).

The research on trust and relating it to leadership is extensive and the connection between the two is well-established. Trust in the other party in the leader-follower relationship is a key element in the success of that relationship. As such, I have included it in this study to determine if the introduction of social media has affected the trust between the leader(s) and follower(s), and consequently their relationship.
Perception

The relational power dynamic is expressed in acts that shape what people accept, what they question, and what they reject (Pfeffer, 1981). For example, if followers expect an outcome or if they attribute organizational success to a leader (or leaders) and it occurs, they accept that this is due to good leadership. Conversely, unexpected (poor) outcomes are not attributed to the leadership, as this does not fit with the followers’ perception of, and attribution of leadership status to the leader. This is further described in Grint (2006) and Nye (2004) as the normative (or soft) power associated with leadership. The *effectiveness* of leadership is dependent upon this power aspect of the relationship because without followers there are no leaders (Hollander, 1993; Howell & Shamir, 2005; Meindl, 1995).

Kouzes and Posner (2007) describe the followers in the leadership relationship as “those who choose to follow” (p. 24). This perspective effectively situates leadership as a choice of the follower. That is to say, the follower chooses to be led in accordance with their personal perception of their world, and in so doing, the follower attributes a measure of power and control to the leader(s). Karp (2013) explores this further in his examination of leadership processes in which he describes leadership as a “time-limited” right granted by followers for “as long as their expectations of the appropriate leadership behaviour, and their own organisational needs, are met” (p. 4). This is not incongruent with the reciprocal nature of the leader-follower relationship as the follower and the leader each have a role to play. The influence of the follower is not diminished by choosing to follow, it is more dependent on the schema adopted by the actors and the context within which they are unfolding (Casten, Uhl-Bien, et al., 2010). That is, the
roles of leader and follower within a relationship are socially constructed and accepted through the perspectives and experiences of the actors.

By choosing to be led, the follower relinquishes to the leader(s) all or some (dependent on the schema and context) of the power to make decisions, select options, set direction, and frame context within which the organization will operate. Pfeffer (1977) talks about this in *The Ambiguity of Leadership* when he discusses how leadership is attributed to individuals by a collective to help them make sense of events and reduce the complexity of the myriad interactions inherent in real-world situations.

Thus, by choosing to follow a leader, the members of an organization, team or unit provide a measure of power to an individual (or set of individuals) to construct or make sense of their reality. Smircich and Morgan (1982) added to Pfeffer’s position by offering that:

Leadership is realized in the process whereby one or more individuals succeeds in attempting to frame and define the reality of others. Indeed, leadership situations may be conceived as those in which there exists an obligation or a perceived right on the part of certain individuals to define the reality of others (p. 258). This makes the followers’ perception of the leader critical to the success or failure of that leader.

In 1977, Calder posited that leadership is a follower’s perception based upon inferences from a leader’s behaviour and/or the effects of that behaviour. Later research provided evidence that as long as the leader(s) continue to meet the expectations and needs of the followers; they will continue to be perceived as the ‘leader’ (Gardner, Avolio, et al., 2005). From this, it can be inferred that leadership effectiveness resides
within the perceptions of the relationship with the followers. That is, a leader can continue to be effective, through the use of their influence and power, as long as the follower perceives them to be the leader (Howell & Shamir, 2005). Thus, leadership becomes a social construction of followers’ perceptions (Fairhurst & Grant, 2010; Gardner & Avolio, 1998; Grint, 2005; Meindl, 1995), or as Bresnen (1996) expressed:

Leadership is neither an individual fact nor a social fiction: it is a “virtual reality” insofar as it constitutes a socially constructed concept that is filtered, interpreted, and acted upon in very different ways, dependent upon diverse cognitive outlooks and experiential circumstances (p. 510).

This is an important perspective for this research as the phenomenon under study resides very much within the perceptions of the leader(s) and the follower(s) as they interact as actors in a relationship. Understanding that each has their own perception of the other, and of reality, creates a dynamic and complex situation to capture, analyze and understand. The importance of perception to understanding leadership was expressed by Livi, Kenny, Albright, and Pierro (2008) in their analysis of leadership through a social relations lens where they found that a critical element of leadership is being perceived by others as a leader and it is in the perceptions of the players where the level of leadership determines who leads and who follows. This is an important connection for this study as the adopted (entity) perspective of the relationship is “centered in individuals’ perceptions and cognitions as they engage in exchanges and influence relationships” (Uhl-Bien, 2006, p. 655) includes the perceptions and cognition of the actors in the relationship.

Meindl (1995) provides further support for the importance of perceptions and cognition as his romance of leadership clearly focuses on the leader-follower
relationship as being “constructed in the minds of the followers” (p. 330). This places the perceptions and cognition as a critical point of the relationship where the strength, weakness, development or degradation can occur. While Meindl considers the inter-follower connections as the primary factor in the social construction, other research has shown that the leader-follower relationship is also a major contributing factor (cf. Howell & Shamir, 2005; Shamir, et al., 1993). Antonakis and Atwater (2002) in their development of a cross-level model of leader distance describe the importance of perception in two of their three dimensions of leader distance (perceived social, perceived task interaction) and they show how important they are to effective leader influence.

Considerable research has been conducted regarding followers’ perceptions and leadership (e.g., Gardner, Avolio, Luthans, May, & Walumbwa, 2005; Robins & Boldero, 2003). Hollander (1992) discusses follower behaviour and how it is influenced by how the follower perceives the attributes, competency and personality of the leader. Shamir and colleagues (1993) consider perceptions of followers extensively during their development of a charismatic theory of leadership. They see the effectiveness and impact of (charismatic) leaders existing primarily in the self-concepts of the followers.

This theme is supported by Gardner and his associates (2005) in their model of authentic leadership and follower development where they posit that “followers’ perceptions of, and trust in, the leader are based largely on the leader’s actions, these actions must be aligned with espoused values to convince followers of the leader’s integrity” (p. 357). As these connections between trust, perceptions and influence become more evident, the importance of perception to the social construction of the
leadership reality emerges. It is this connection that I am exploring to understand how the leader-follower relationship unfolds in the context of social media.

**Influence**

As described earlier, there has been considerable research to date that provides evidence of the importance of the leader-follower relationship to understanding leadership (cf. Collinson, 2005; Gerstner & Day, 1997; Ruiz, Ruiz, & Martinez, 2011; Shamir, House, & Arthur, 1993) and there are certain elements of the relationship that are key to understanding it in more depth. Returning to the foundational definitions of leadership provided earlier, Rost (1993) calls leadership “an influence relationship wherein leaders and collaborators influence one another about real changes that reflects their mutual purposes” (p. 134 emphasis added) and Fairhurst and Grant (2010) offer that leadership is “... a product of socio-historic and collective meaning making” (p. 172 emphasis added). The emphasis on influence and meaning making are two key elements to understanding the unique relationship between leader(s) and follower(s). The connection and importance to and of social media regarding influence and meaning making will become clear as this review develops.

Since Burns’ *Leadership* treatise in 1978, influence has been widely recognized as a core element of leadership (cf. Gioia & Chittipeddi, 1991; Hogg & Van Knippenberg, 2003; Lord, Brown, & Freiberg, 1999; Yukl, 2013). Influence as a key part of leadership emerges as ‘Idealized influence’, one of the “Four I’s” of transformational leadership (Bass, 1985) and has been found to be “the most prototypic and often the single most important dimension” of transformational leaders (Judge & Bono, 2000, p. 751).
Robert Lord and colleagues have done extensive research connecting influence and perception and relating that connection to leadership (Hall & Lord, 1995; Lord, Brown, & Freiberg, 1999; Lord, De Vader, & Alliger, 1986). Conclusions from their work provide strong evidence that there is a mutually influential element present in the leader-follower relationship. That is, when one party influences the perception of the other, that modified perception alters how the first party is perceived in the relationship (Lord, et al., 1999). How the actors in the relationship perceive themselves and each other influences the quality of the relationship.

Sweeney, Thompson, and Blanton (2009) further develop the idea of interdependence, trust and leader credibility as they extend earlier work by Kelley and Thibaut (1978) to explore trust and influence in military combat situations. They tested a theoretical model for the development of trust and found a strong correlation between the level of trust in a leader and that leader’s influence. They confirmed Calder’s (1977) premise that that leadership is directly related to a follower’s perception generated from observing a leader’s behaviour and/or its effects. I am particularly interested in this aspect, since a leader’s intentions are rooted their mental models and formed by their perceptions and construction of reality. These perceptions of themselves, their followers, and the situation directly impact the leader-follower relationship and are subjects of the inquiries of this study.

Avolio and colleagues (2004) draw on aspects of personal and social identification and follower trust as elements that link leadership to followers’ behaviors and actions. This supports Kark, Shamir, and Chen’s (2003) study of transformational leaders and their findings that leaders influence followers by fostering a personal
identification with the leader as an individual and a collective identification with the organization. Popper (2011), in his development of a Theory of Followership, discusses this further when he examines how, from a social-psychological perspective the attraction followers have to their leaders is connected to their social identity. This follows the perspective of Hogg (2001) where he advances his Social Identity Theory of Leadership that proposes that social categorization (i.e., group identification) and social identity describe and define the group process through which leadership is effected. He offers that it is through the social and group identification and the associated adherence to norms and expectations that leaders emerge and are granted status by the others in the group. It is through this granting of higher status that influence is developed by the leader within the group. This has direct application to the situation under study as the leaders in this case, although already having higher status due to their rank and position, however they maintained and enhanced their status through consistently meeting the social expectations of the group.

Robins and Boldero (2003) advance their relational discrepancy theory based in large part on the commensurability of the perceptions of self and self-guides and the perceptions of the other(s) and their self-guides in the relationship. The perception of commensurability leads to development of trust and closeness (intimacy), and the establishment of roles within the leader-follower relationship. They posit that congruence or discrepancy of the perceptions of “selves” within the players in a dyad can strengthen or weaken the relationship. Howell and Shamir (2005) support this perspective and the reciprocal nature of the relationship when they posit that it is the followers, through their empowering of the leader, that play the most significant role in
determining the ultimate success of the relationship. This has direct application for this study as research has shown that the perception of congruence between a leader’s version of the environment and the followers’ expectations, values, and perspective produces a stronger connection and results in more effective leadership (cf. Graen & Uhl-Bien, 1995; Shamir, Zakay, Breinin, & Popper, 1998; Weick & Quinn, 1999). It has yet to be established how that perception of congruence is formed when social media is part of the leadership context.

The perception of congruence between the leader and the followers’ versions of the environment can be understood by considering the work on leaders as sensemakers or meaning makers. As previously described, when followers accept a leader, they acquiesce to them a certain amount of power. One manifestation of this is in the power to make sense of the environment and interpret the available information to construct an acceptable version of their reality. This role as been deemed “sensemaker” by Weick and colleagues (Weick, Sutcliffe, & Obstfeld, 2005) in which they describe meaning materializing from sensemaking by way of language and communication. One of the key activities in sensemaking is the ability of the leader(s) to frame the situation in such a way that it makes the most sense to their constituents. In The Art of Framing Fairhurst and Sarr (1996), draw from Weick and others to define ‘framing’ as:

The ability to shape the meaning of a subject, to judge its character and significance. To hold the frame of a subject is to choose one particular meaning (or set of meanings) over another. When we share our frames with others (the process of framing), we manage meaning because we assert that our interpretations should be taken as real over other possible interpretations. (p. 3).
Sally Maitlis (2004, 2005) provides strong evidence of the role that the leader can play in sensemaking and management of perceptions. She shows how controlling the primary information channels and managing the impressions (making sense) enabled a leader to exercise considerable control over the organization while those who did not have such control lacked the same success (Maitlis, 2004). Her 2005 article discusses the social processes of sensemaking and offers that sensegiving (i.e., influencing others’ understanding of issues) is “a fundamental leadership activity within organizational sensemaking” (p. 22). This perspective is founded on earlier work by Gioia and Chittipeddi (1991) who put forward that sensegiving is a key leadership action during times of organizational change. Later work by Maitlis and Lawrence (2007) provided further insight into the role perception and communication play in triggering and enabling sensegiving and sensemaking. Sensemaking, through control of information is discussed further in the following section.

The underlying connections between relationships, perceptions, influence, and sensemaking form the foundational elements of this study. It was through these connections that I first considered the potential of social media to affect leadership in a contemporary organization. I will now examine these elements by considering two key methods of how the leader-follower relationship is developed and maintained; through information sharing and communication.

**Leadership and Information Sharing**

Bunderson and Sutcliffe (2002) define information sharing as the “conscious and deliberate attempts on the part of team members to exchange work-related information, keep one another appraised of activities, and inform one another of key developments”
As a leader, how, when and where to share information impacts the choice of leadership style or approach required to be effective in a given situation. It is widely acknowledged that when leaders share information with employees better decisions follow (cf. Gigone & Hastie, 1993; Stasser & Titus, 1987). Chan (2014) supports this premise in describing how informed employees are more apt to come forward with constructive proposal and ideas when engaged in group discussions. Leggat and Balding, in their 2013 study of organizational competence in clinical leadership, found that information sharing was one of the seven key organizational factors that participants mentioned when they conceptualized leadership. With its inherent capability and capacity to share information, social media can impact information sharing as it pertains to the leader-follower relationship. Charlene Li (2010) refers to this in her discussion on how social technology can be used to change leadership when she describes six of her ten elements of openness as some form of information sharing. The question I have is, “does this affect how the leader-follower relationship is conducted – and if so, how?”

Chan’s (2014) research examined how leadership behaviours affect employees’ contributions (he uses the term “voice”) and whether information sharing mediates the effects. His results show that given the chance, employees are willing to express their opinions and engage with the leader in decision making. He found a positive relationship between what he terms moral leadership and employee engagement/communication under conditions where information sharing was prevalent.

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4 Li’s ten elements of openness include 6 under Information Sharing – Explaining, Updating, Conversing, Open Mic, Crowdsourcing, and Platforms, and 4 under Decision Making – Centralized, Democratic, Self-Managing, and Distributed (Li, 2010, p. 22)

5 Chan cites Farh and Cheng (2000) in defining moral leadership as “behavior that demonstrates superior personal virtue, self-discipline and unselfishness” (p. 669)
This follows the work of Huffaker (2010) who determined that “leaders are often “reaching out” to the community, engaging in relationship development and maintenance that contribute to the success of the group as a whole” (p. 610).

Many researchers advocate the adoption of shared (or distributed) leadership as the most effective means of achieving organizational aims (cf. Carson, Tesluk, & Marrone, 2007; Day, Gronn, & Salas, 2004, 2006; Pearce & Conger, 2003). Shared/team/distributive leadership has been described as a “team process where leadership is carried out by the team as a whole, rather than solely by a single designated individual” (Ensley, Hmieleski, & Pearce, 2006, p. 220). A shared leadership situation has been shown to promote an empowered work environment (Chan, 2014), more positive team processes (Bunderson & Sutcliffe, 2002), better decision-making (Dahlin, Weingart, & Hinds, 2005), and provide firms a competitive advantage (Carson, et al., 2007, p. 1217). A critical factor in achieving these results in each of these studies is the type and quality of the information being shared. As Hoch found in her 2014 research in which she studied how diversity and information sharing impacted the relationship between shared leadership and team performance:

The quality of information sharing, in its essence, depends on the actual presence of distinct and non-redundant, non-overlapping information, and knowledge as held by the members of a team. Only the sharing of non-redundant, non-overlapping information among the team members has the potential to enhance team performance (p. 547)

Leadership is often derived from the quality and amount of unshared information that an individual possesses. Research on how the amount and quality of information and how it is shared by the leader(s) has shown that leaders tend to be looser with
information if they do not have all the requisite knowledge or facts and require team member input to make a decision (Vroom & Jago, 1995). Sagie, Zaidman, Amichai-Hamburger, Te’eni, and Schwartz (2002) extend this line of inquiry by examining how information sharing mediates the influence of leadership styles; loose (participative) or tight (directive). They conclude that information sharing contributes positively to organizational performance through better understanding and more acceptance of the leadership/organizational vision and enabling employee contribution to decision-making and problem solving within the organization.

Stewart and Stasser (1995) in examining expert role assignment and information sharing found that leaders have more influence than other group members because of the information they possess and share. Wittenbaum (2000) concluded that when high status group members (i.e., leaders) presented information it was more likely to be accepted and recalled by other members of the team. As Wittenbaum and Park (2001) found in their study of sharing of information among group members, individuals gain status as leaders through the sharing of information as others then perceive them as more competent. Thus, it is less important for a leader to have all the information than it is for the leader effectively use the information once they have it (Maitlis, 2005). The way effective leaders share and present information is through framing and making sense of the information in a way that fits with the followers’ perceptions and construction of reality (Smircich & Morgan, 1982; Weick, et al., 2005).

Holmberg and Tyrstrup (2010) found that everyday leadership is driven by the events of the day and that leaders interpret, adjust and frame new directions for the organization. In short, they make sense of the ever-changing environment to provide
leadership on a daily basis and adjust long-term perspectives and goals as new information becomes available. From a sensemaking and sensegiving perspective, the amount of control of information is a key to how effective the sensegiving effort is within the context of the situation (Weick, et al., 2005). Social media reduces or removes most forms of control over information (Li & Bernoff, 2011). This impacts how the followers receive information and consequently how they perceive the information sharing or sensegiving efforts of the leader(s).

Overall, the sharing of information is a key element of leadership particularly as it pertains to the contemporary organization. The research provides strong evidence that decisions made by groups are supported by the information that is shared among the members rather than the unshared information that, although available to the group, is often unshared (Stasser & Titus, 1985). The availability of information through social media is almost unbounded, but how does this affect information sharing in the leadership relationships?

Leaders hold a key position with regard to information sharing and decision-making in that their behaviour and knowledge can directly impact team performance (Carson, et al., 2007; Dahlin, et al., 2005). Social media makes information more readily available to a wider audience and offers the opportunity to include diverse perspectives that can positively or negatively contribute to effective decision-making. It is important to note that the information on social media can be constructive and destructive in nature, depending on the source and their particular motives. Leaders are well-advised to remain cognizant of these realities as they adapt to the inclusion of social media in their organizations. However, as Wellman and Gulia (1999) argue in
their examination of how people work and socialize online, online community interactions involve more than just information exchange; they support and promote loyal relationships. Do these interactions counteract each other or do they just change how the relationship works? These are the questions unanswered in the literature and the ones I am seeking to address.

**Leadership and Communication**

Leadership and communication have long been connected (cf. Bass, 1985; Spangler & House, 1991) and many authors have conducted research that has found that effective communication is directly related to effective leadership (e.g., Awamleh & Gardner, 1999; Shamir, 2007; Towler, 2003). Bennis and Nanus, in their 1985 book *Leaders; Strategies for Taking Charge* provided qualitative data that offered that although leaders often had divergent styles, effective leaders were competent in communication and in implementing their vision. Kirkpatrick and Locke (1996) identified (charismatic) communication as one of the three core components that determine effective performance of charismatic leaders, although their data did not support a relationship between a particular communication style and performance. De Vries, Bakker-Pieper, and Oostenveld (2010) in their comparison of leadership and communication styles noted that the interpersonal communication style of a leader is one of the core elements that determine its effectiveness. This was also borne out in the GLOBE studies in which Dorfman, Hanges, and Brodbeck (2004) found “Communicative” as one of the universally accepted attributes of leadership – although what is considered effective communication differs across cultures.
Communication and leadership have been closely linked throughout the recent decades, Fairhurst and Connaughton’s (2014) literature review on organizational communications and its relation to leadership provides a broad perspective on this link as they include research and articles from beyond just a North American, positivist perspective. They provide a view through multiple lenses to show “communication to be central, defining and constitutive of leadership” (p. 8). By examining leadership and communication in six different “communication value commitments” they offer perspectives based on transmission and meaning, relational, influence and organizing, power-based, diverse/global, and the potential for reflexivity and accountability. Throughout their review, they make clear the importance and connection of communication to leadership.

This is further supported by Sias (2009), in her chapter on the supervisor-subordinate relationship, where she discusses the communication functions inherent in this relationship. She offers that the communication includes information exchange, reciprocal feedback, and appraisal. Neufeld, Wan, and Fang (2010), in looking at remote leadership and communication, found that communication effectiveness was positively related to the perception of leadership effectiveness. Similarly, Morgeson, DeRue, and Karam (2010) included communication as one of the (many) leadership functions key to team effectiveness in their team leadership model.

It is straightforward to make the connection between communication and the literature reviewed earlier on trust and the leader-follower relationship, and to strengthen my reasoning for studying trust as an indicator of the relationship. Burke, Sims, and Salas (2007) in their multi-level review of trust and leadership connected
communication, trust and leadership as contributing inputs to the development of the effectiveness of each in relationship to the other. They summarized this relationship in stating that:

by creating a sense of trust towards the team leader, communication lines will be opened up to transmit needed information to lead to innovation, error remediation/prevention, and an ever growing and reciprocated sense of trust between the team leader and the subordinate. Another benefit of trust is that not only has it been found to open up the communication pathway, trust promotes a desire to interact and even enhances satisfaction with communication. (p. 623)

Alvesson and Kärreman (2000) discuss meaning as an essential element of communication. Connecting this with Smircich and Morgan’s (1982) presentation of leaders as managers of meaning, the link between communication and leadership can be made across the years and across geographic perspectives. Karl Weick (1995) makes that connection even more significant as he positions leaders in the role of sensemakers and sensegivers. Communication is essential to the role of sensemaker as sensegiving and framing use language and meaning to convince people of the validity of the perspective espoused by the leader (Maitlis, 2005; Weick, Sutcliffe, & Obstfeld, 2005). Dionne, Sayama, Hao, and Bush (2010) further sustain this in their examination of the role of leader in developing shared mental models among team members. Although they only considered two leadership styles (LMX and participative), it was evident that a strong relationship involving good communication between the leader and the team members enhanced the development and sharing of congruent mental models.
Similarly, Gail Fairhurst in her 2011 book *The Power of Framing: Creating the Language of Leadership* posited that in framing, leaders use language to create meaning for their followers and so engage in the social construction of the reality within which leadership occurs. All of this supports Berger and Luckman (1966) position that we shape and are shaped by our communications and interactions with each other. This is summarized effectively by Fairhurst and Connaughton (2014) when they state that:

an emphasis on meaning and framing counters the tendency of managers and others to view communication as a simple transmission; heightens a sensitivity to language as a basis for reality construction; and instills a sense in which the seed of change lies in every communicative encounter (p. 21)

Perhaps more germane to this study, there has been considerable work done in researching communication and leadership in the online communities. Connaughton and Daly (2004) in their examination of leading virtual teams concluded that communication was a critical element in the successful development and functioning of virtual teams. Through effective and timely communication, leaders and team members were able to build productive processes and more importantly, build trust to enhance the relationships within the team – despite the lack of face-to-face contact. The work of David Huffaker (2010) in his assessment of communication behaviours of online leaders further supports the importance of communication in the leader-follower relationship online. He found that “leaders are more likely to post messages ... reply to other messages ... and that leaders are more likely to have a longer tenure ... in the group” (p. 606) than other members. Interestingly, he also found that “leaders both give and
receive” and “engage in reciprocal links” (p. 610) – which directly supports the relational aspects of leadership under study here.

**Synopsis of Leadership Literature**

The leadership literature on the leader-follower relationship is extensive and covers many aspects of that affiliation. In providing this review I have offered examples from the literature that describe and consider the relationship from the followers' perspective and how important that is to the connection. In essence, the follower by accepting the leader in that role has certain expectations and perceptions of the leader’s behaviours and actions. There are elements of trust and vulnerability associated with accepting the leader.

The leader, on the other hand, perceives this trust and acceptance and is now in a position to influence through communication and consequently, to make sense of and influence the construction of the social reality for the followers. By controlling and framing the information that is shared within the relationship(s), the leader assumes the role of sensemaker or sensegiver. This is done through strategic use of language and meaning-making via the communication channels that are critical to the maintenance of the leader-follower relationship.

The literature on leadership and relationships, trust, influence, information sharing and communications offers an extensive array of hypotheses and theories. For the most part, these theories and conclusions were developed and tested in organizations that used ‘pre-social media’ communication tools and methods. The research and studies do not discuss how or if the introduction of social media have affected leadership in the 21st century nor does it discuss how the key relationship –
between the leader-follower – is developed and maintained with the presence of this ‘new’ communication and relational tool. This study seeks to do so.

Having looked at the leadership literature, I will now turn to the social media corpus of knowledge to determine if there has been research within this discipline that explains leadership in this new reality. I will examine research that is relevant to this study in order to provide the connection between the aspects of leadership reviewed here and the introduction of social media as a communication, information sharing, and relational tool.

**Social Media**

*Man is by nature a social animal. Aristotle, Politics*

Like the term leadership, there are myriad definitions of ‘social’ and it is often referred to as a fuzzy concept (see Haack, 1996). Not seeking to add to the confusion, I will not attempt to define ‘social’ however, in this context, to be ‘social’ refers broadly to interacting with other humans and to contributing to the collective co-existence; to the community.

According to van Zyl (2008) “[a]n individual’s success in society depends on the shape and size of his/her social network and ability to network and form connections with other social groups” (p. 906). In these terms, a primary element of being social is the relationships we seek, form, maintain, and let dissolve as a part of being involved in our network(s) and community(s). These relationships are conducted through social interaction with other actors (Reis, Collins, & Berscheid, 2000). These interactions include, among other elements; communication, information sharing, and relationships.
Social media offers an enhanced method of interacting, creating and exchanging information and extending social networks.

In this section of the chapter, I will review the literature relevant to how social media and Web 2.0 has impacted the ways we communicate, how we exchange information and most importantly, how we relate to each other using the technology enabled by social media and social networking sites (SNS). The use of SNS for communication is important in this context because of the criticality of communication to effective leadership. Additionally, information exchange is key to the leader-follower relationship because how, when, where and in what context information is shared can influence leadership effectiveness in terms of sensemaking and in the reliance/trust aspects of the relationship. Similarly, it is important to examine how social media has changed the way in which we relate to each other in terms of seeking, developing, maintaining and terminating relationships, including the leader-follower relationship. This section will provide a review of the extant literature on social media in relation to these three areas and consider how the theories and findings relate to the leader-follower relationship. In order to properly situate the information that follows, I will start with describing social networks as they pertain to the other aspects of this review.

**Social Networks**

The introduction of social media offers an alternative to the established methods of interacting. “Before the invention of mass media, people learned new things from their acquaintances ... Knowledge flowed through social networks, and the limits of a

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6 Recall the selected definition of social media for this dissertation as “a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content” (Kaplan & Haenlein, 2010, p. 61)
network limited the spread of knowledge” (Donath, 2007, p. 244). Social media can be seen as another element of mass media. Even more than mass media, social media delimits our social networks in a number of ways.

A social network is based on the premise we all interact through ties with others, either closely or indirectly (Granovetter, 1978, 1983). The idea of a social network emerged from theories and experiments conducted throughout the past century (cf. Karinthy, 1929; Milgram, 1967; Watts, 2001) to demonstrate that anyone in the world can be connected to anyone else via a network of approximately six connections. A social network is comprised of social actors who make up the nodes and their relationships comprise the connections. The social network provides its members with a sense of community and connectivity that enables free flow of information among participants (Granovetter, 1973). The foundation of informal communication in organizations is the social network which enables it to function and it is upon this basis that much of today’s social media ventures are predicated (Kim, et al., 2010; O’Toole & Talbot, 2011). As we examine leadership in a broader context, the importance of the social network becomes even more relevant.

The social network remains a viable and important element of how we form, and interact within our communities. They have become an integral part of how social media works and are manifest in the many SNS that exist today. A social network is subset of a community. In this study, I originally focused on the social networks that used social media but soon found that identifying with community (i.e., social identity) needed to be considered in this context. A community differs from a social network as shown in Table
1. The relevance of delineating these will become evident throughout the review and in the analysis of the data.

<table>
<thead>
<tr>
<th>Social Networks:</th>
<th>Communities:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are a set of interpersonal relationships between individuals</td>
<td>Are a collective of individuals who may or may not have a personal relationship</td>
</tr>
<tr>
<td>Have a network structure (nodes and connections)</td>
<td>Characterized by some common interests of a group of people</td>
</tr>
<tr>
<td>Unique to each individual</td>
<td>One individual may be a part of multiple communities</td>
</tr>
<tr>
<td>Refers to the personal interactions, and connections among participants for information flows and helpful linkages</td>
<td>Refers to the development of a shared identity around a topic that represents a collective intention—however tacit and distributed</td>
</tr>
</tbody>
</table>

Table 1. Network vs. Community (Wu, 2010)

The introduction of social networking sites in 1997 (Six Degrees) offered an alternate method of developing and maintaining relationships and networks (Kietzmann, Hermkens, McCarthy, & Silvestre, 2011) by offering a means of richly sharing data, ideas and connections. In 2004, with the launch of Facebook, and the emergence of Web 2.0, social networking entered a much more ubiquitous and impactful era. Now, people can connect in real-time in a rich, cost-effective, and meaningful manner regardless of geographical or temporal separation. The introduction of electronic media as a means of connecting people in and between social networks has resulted in an exponential rise in the number of networks on a global scale (Kaplan & Haenlein, 2010; Kim, et al., 2010). In other words, social media enabled not only immediate and
affordable connection *within* a person’s social network, it provided a means of establishing inter-network connections as well.

The significance of the popularity and widespread use of social media lies in its ability to share information in real-time in a variety of formats (Kim, et al., 2010). The combination of these capabilities results in the power to transmit, receive and store messages nearly instantaneously with a richness that cultivates connections and relationships (Kaplan & Haenlein, 2010). The social networking capability permits the passage of information almost without constraint and it facilitates the inclusion of an almost unrestricted population (Kaplan & Haenlein, 2010).

In 2006, Boase, Horrigan, Wellman, and Rainie offered their perspective that the internet and social media have transformed how we interact by expanding our social reach while maintaining the fundamental elements of building relationships and communities. Now, how people communicate ideas and events is influenced by the ability of social media to generate content and share it widely (Kaplan & Haenlein, 2010). As Keitzmann and colleagues (2011) offered “Social media introduce substantial and pervasive changes to communication between organizations, communities, and individuals” (p. 250).

Of significance for leadership, the members of a social network are usually not exclusive to one network. This facilitates the *inter-network* flow of information (Balkundi & Kildoff, 2005; Kim, et al., 2010). This capability makes the various modes of social media effective and efficient methods of gathering support, creating awareness, and developing consensus; the elements necessary for the creation of communities or to coalesce individuals into groups and transform groups into focused teams (Guzzo &
Dickson, 1996). As Balkundi and Kildoff (2005) posit when discussing the ties within a social network:

If a leader wants to use social network ties to lead others, the leader must be able to perceive the existence, nature, and structure of these ties — not just the ties surrounding the leader, but the ties connecting others in the organization both near and far. (p. 946)

Social media also has the power to influence behaviour and opinion – that is, to enable sensegiving and sensemaking. As Hanna, et al., (2011) in their discussion of social media as an ecosystem of associated components state “social media have transformed the Internet from a platform for information, to a platform for influence” (p. 272). This is supported by the research of Moorhead, Hazlett, Harrison, et al., (2013) in their study of social media in health care. Their analysis of available literature revealed that social media increased the interactions between players in the system, improved accessibility to information and influenced policy making. These findings add to our understanding of social media as a vitally important leadership tool, as influencing perceptions and behaviour is a core element of leadership (Yukl, 2013).

In Kaplan and Haenlein’s (2010) definition of social media, the phrase “allow the creation and exchange of User Generated Content” is a key element of the changes enabled by social media. The creation and exchange of user generated content (i.e., personal information) makes social media a communication tool, an information source, and a relational aid. I will now review the literature as it relates to each of these aspects in turn to show their relevance and connection to this study.
Social Media and Communication

Kim, Jeong, and Lee (2010) in their exploration of social web sites, posit that “[s]ocial Web sites provide various facilities for members to use to communicate with their online connections, that is, friends and other members” (p. 219). They identify four of their eight essential features of these sites as ‘communication’: participating in groups, communicating with connections, sharing content (UGC), and expressing opinions. Each of these communication features enables rich communication within and between networks. In their examination of internal communications and change, Seivert and Nelke (2011) concur with the assessment by Kim, et al., (2010) that social media is a key form of communication. They offer that social media changes how communication in organization is conducted. By removing control of communication from the top echelons, it now becomes a more interactive process. They cite Smith and Mounter (2008) in establishing that social media is “really just another tool in the communicator’s box” (p. 4) but one that has become extremely important.

Social media is a widely recognized as an effective means of communication. Marketers see social media as an integral element of Integrated Marketing Communications (IMC) strategies, and as having multiple roles including a unique one: it enables customer-to-customer communication on an unlimited scale (Mangold & Faulds, 2009). This is echoed by Gillin (2009) when he discusses how “[c]onventional marketing wisdom has long held that a dissatisfied customer tells ten people. But that is out of date. In the new age of social media, he or she has the tools to tell 10 million” (p. 4). In their conceptualizing of social media as an ecosystem, Hanna, Rohm, and Crittenden (2011) continue this line of inquiry and conclude that integration of social
media should be a key element of any firm’s communications strategy to improve their connection with their customers and other stakeholders.

Engagement in a dialogue, Gossieaux and Moran (2010) state, is more in line with our natural tendencies than previous organizational communication strategies that were driven from the top down. They posit that the interactive nature and capabilities of social media enable communications that are more meaningful and more closely resemble dialogue and not one-way transmissions. Thus, communications from organizations to the customer (managing the message) have been considerably impacted by social media. The ability to use social media to extend social networks and influence opinions and perspectives has had a considerable impact on internal and external communications for organizations (Bernoff & Li, 2011).

The political protests in Egypt, Tunisia and more recently in Hong Kong clearly demonstrated the use of social media as a communications tool. Describing the situation in Africa and the Middle East, Tufecki and Wilson (2012) observed that “[s]ocial media are just one portion of a new system of political communication that has evolved” (p. 365). The use of social media in other anti-government protests throughout the Middle East, in England, in Quebec, and in Hong Kong (El-Naggar, 2011; Lim, 2012) provides further evidence of the widespread use of social media as a communication tool to generate support from external connections or customers – or followers. This evolution is of significance for organizations that wish to compete internationally. More and more, there is evidence that a global communications strategy that includes social media is a requirement for success in a wide range of international markets (Bernoff & Li, 2011)
Social media is also enabling the development of intranets that promote workplace collaboration within organizations. There are many examples of the implementation of a social media internal network to promote better internal communications. A good example of this can be found at Alcatel-Lucent immediately following their merger in 2006. The emphasis and effort placed on establishing an effective new internal communication system that reflected the new company resulted in a relatively smooth transition to the new reality of the merged companies. Rosie Steeves, in her book *Breaking the Leadership Mold* (2010) speaks to this when she advocates that leaders “Figure Out Communication” (Chapter 15) by engaging in honest dialogue and conversation with their employees, now easily accomplished through channels opened up by social media.

In a 2013 study of social media implementation in European SMEs, Verheyden and Goeman found “that social networking sites are the most popular platforms and that the focus of most organizations is aimed at leveraging social media to communicate with external stakeholders” (p. 11). Regarding internal use of social media, their study found that its use was widespread (>78%) and that it was more prevalent in larger organizations than in the small- to medium-sized firms. They posit that this is likely due to the costs involved in implementing an internal social media-style network. Costs aside, the introduction of social media within an organization is becoming the new standard for internal communication and as Miles and Mangold (2014) argue it needs to be implemented with purpose and careful forethought. Social media can be an excellent method of communicating internally with employees but it can also be a “time bomb”
that can damage an organization’s brand within milliseconds (Miles & Mangold, 2014, p. 410).

The need for open and authentic communications has never been more evident or critical to an organization’s success (Li, 2010). External communications with stakeholders of all stripes must be managed equally prudently as the networks enabled by SNS and social media have shifted the balance of power when it comes to information. Thus, it is inherent upon the organization to establish guidelines and standards for the use of social media as a communication tool to connect with internal and external stakeholders (Oميلion-Hodges & Baker, 2014). These guidelines can inform the type and method of information sharing that is enabled by social media.

**Social Media and Information Sharing**

Social media is also important as an information source. Information has become a key commodity in today’s networked society (Castells, 2001 as cited in Seivert & Nelke, 2011). O’Toole and Talbot (2011) in their examination of knowledge development and learning systems in the Australian Defence Force found that “knowledge creation opportunities are shaped by participation in social networks and discourse communities ...” (p. 46). In their research they found that social media enables the establishment of communities and were a preferred method of sharing and gaining access to information efficiently and expeditiously.

An alternate perspective of social media as an information tool is reflected in the fact that managers have less control of information (Kaplan & Haenlein, 2010; Li, 2010; Seivert & Nelke, 2011). Mangold and Faulds (2009) lament the lack of strategy and methods to exploit social media in marketing terms, despite the burgeoning evidence of
the impact of consumer-to-consumer sharing of information, opinions and recommendations.

Both perspectives have relevance for this study because “as knowledge is distributed, it is also interpreted, enabling richer and varied meanings to be created, and thus enhancing the range of possible useful behavior” (O’Toole & Talbot, 2011, p. 55). The implications for the leader-follower relationship are multi-layered and complex.

Social media complicates the leadership challenge in that information flow can no longer be controlled as it once was. Donath (2007) discusses the implications of this, emphasizing that information can no longer be considered on a local scale but must be viewed from a global perspective. This implies that greater access to information means less ability to control opinion and perspective, extending Granovetter’s (1973) argument that a key strength of weak ties is their capacity to provide a breadth of information. This has clear and present impact on a leader’s ability to be the sensemaker.

As previously discussed, sensemaking and leadership have been closely associated (cf. Maitlis, 2005; Weick, 1995). Gioia and Thomas (1996) identified sensemaking as a role of leaders specifically in regards to knowing and understanding the environment and interpreting issues in context. Maitlis (2005) refers to sensemaking a “fundamentally social process” (p. 21), and paraphrases previous studies in describing it as a process whereby “members interpret their environment in and through interactions with others, constructing accounts that allow them to comprehend the world and act collectively” (Maitlis, 2005). It is the social and contextual aspects of these findings on sensemaking that make the presence of social media so important for leaders.
From these descriptions of social media as a communication and information sharing tool, it is clear that social media and SNSs offer a platform that is perfectly aligned with the actions of sensemaking. What was once a primary domain of leaders, due to their unique access to information, has been made available to all stakeholders of an organization through internet technologies. The implications for leaders are myriad and require a different approach than what has worked in this regard in the past.

There has been some research done to examine social media and its role in sensemaking for online information for personnel selection (Berkelaar, 2014), for societal sensemaking of images (Izak, 2014), and as it relates to social media and newspapers (Kosonen & Ellonen, 2010). The literature on sensemaking and social media as it relates to leadership is sparse (non-existent) and this presents an opportunity for further research.

Mediating the widespread use and growth of social media for information sharing, personal networks remain a trusted and valued source of information. This is important from a leadership perspective because people use their personal networks to establish the credibility and perceptions of the information received and the sources from which it is received. Donath (2007) summarizes the importance of this when she describes the connection between information sharing and relationships:

Seeking information from acquaintances puts information giving and seeking into the social economics of the relationship; it is an exchange of favors, of revealing needs and providing assistance. Whether as a means for bolstering status, strengthening ties, or for showing one’s esoteric knowledge, people use information strategically (Burt, 1997; Paine, 1967, p. 246).
Social Media and Relationships

The relational component of social media is of direct relevance to this study. As a relational tool, social media has the capacity to introduce, foster, weaken, and even end relationships (Kaplan & Haenlein, 2010; Kim, et al., 2010). The primary avenue for involvement in relationships via social media is the Social Networking Site (SNS). Recent research on SNS indicates that strong and weak ties are supported by the use of SNS (Boase, Horrigan, et al., 2006; Ellison, Lenhart, & Madden, 2007; Steinfield & Lampe, 2007). “The objectives of the sites are to enable the formation of online communities, interactions among members of such communities, and the sharing of UCCs” (Kim, et al., 2010). Social networking sites enable members to share and become involved in their and others’ social networks (Boyd & Ellison, 2007). This is important because it facilitates connections between network members that may not have otherwise been made. Although research indicates that most social networking sites sustain pre-existing social relationships, the opportunity to broaden the social network and the associated introduction of new perspectives has the potential to strengthen or weaken existing relationships (cf. Boyd & Ellison, 2007; Granovetter, 1983); this includes the leader-follower relationship.

As indicated earlier in this dissertation, Kaplan and Haenlein (2010) classify social media into six categories based on four elements of social presence, media richness, self-presentation and self-disclosure (see Figure 1). I will now discuss each of these in turn to demonstrate their relevance to this study.

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7 Kim, et al., (2010) uses the term UCC – user created content rather than Kaplan and Haenlein’s (2010) UGC – user generated content. They are essentially the same thing.
Social presence is defined as “the acoustic, visual, and physical contact that can be achieved ... between two communication partners. Social presence is influenced by the intimacy (interpersonal vs. mediated) and immediacy (asynchronous vs. synchronous) of the medium” (Kaplan & Haenlein, 2010, p. 61). They go on to state that social presence is directly related to influence. Thus, it becomes an important factor in this study as influence and leadership are closely associated (Yukl, 2013).

Media richness is determined by the manner in which equivocality and uncertainty are managed (Daft & Lengel, 1986). Social media, with its capacity for immediate feedback, high number of cues, personalization and language variety can be considered within the highest richness classification, approaching the most productive medium; face-to-face (Daft & Lengel, 1986; Kaplan & Haenlein, 2010). This makes social media an exceptionally effective method of communicating ideas, sharing information and initiating and maintaining relationships. The capability of social media to enable rich interactions increases its importance to the relationship.

Self-presentation and self-disclosure are closely linked. Self-presentation is predicated on the idea that “in any type of social interaction people have the desire to control the impressions other people form of them” (Goffman, 1959 as cited in Kaplan & Haenlein, 2010, p. 62). They do this either to influence or to establish an identity and it is accomplished through self-disclosure which is “the conscious or unconscious revelation of personal information” (Kaplan & Haenlein, 2010, p. 62) which has been proven to be a critical factor in the development of meaningful relationships.
Research has shown that individuals tend to disclose considerable amounts of personal information on social networking sites such as Facebook (Christofides, Muise, & Desmarais, 2009). Christofides and associates (2009) go on to state:

Disclosing information is also an important part of building relationships. Previous research has shown that there is a reciprocal relationship between trust and self-disclosure in online communication. Information disclosure increases the impression of trustworthiness and results in reciprocal personal disclosure on the part of the conversation partner (p. 342).

This connection between the literature on trust and social media makes the relationship between social media and leadership evident and merits further research, which is the aim of this study.

O’Toole and Talbot (2011) also discuss trust as a foundational element in social networks and how social media enable the regular evaluation of the trustworthiness of the members of the social network. Recall that Rousseau, Sitkin, Burt, and Camerer (1998) describe trust as a psychological state in which one is willing to be vulnerable under conditions of risk and interdependence. In terms of SNS, the condition of risk is derived from the uncertainty of the other members of the network to act appropriately (according to the accepted norms of the site) and interdependence, which is the reliance on the others in the network to contribute in meaningful ways to the furtherance of the goals of the site (which may implied or explicit). Rousseau and colleagues go on to describe relational trust as developing over time through repeated interactions between the players as they build reliability and dependability and raise mutually positive expectations within the relationship. "Information available from within the
relationship itself forms the basis of relational trust” (Rousseau, et al., 1998, p. 399 emphasis in original). The relational trust element within the leader-follower relationship is of particular interest to this study as social media, through its relational capabilities, can affect this aspect of the relationship. But how does one develop or elicit ‘trust’ through an electronic medium such as a SNS?

Becoming a member of a SNS requires disclosure of certain personal information that in and of itself does not develop trust as these profiles can be misleading or created to gain access to the community (Christofides, et al., 2009). However, most SNS involve connections with other members of the community and it is through these links to other members, and their implicit acceptance or acknowledgment that your self-disclosed information is valid, that acceptance into the community and a level of trust is generated (Donath & Boyd, 2004). SNS, through their expectations and self-enforced social norms, offer the combination of risk and interdependence necessary to develop trust among participants, even those with weak ties.

Weak ties, described as distant and typically of infrequent interaction by Granovetter (1973), especially those that are trusted, offer valuable (and often novel) information, as they bring new and diverse perspectives and useful knowledge from outside the community (Levin & Cross, 2004). This is in contrast to strong ties, typified as being close and having frequent interaction (Granovetter, 1973) where daily connections are made, trust is expected and nurtured through personal interactions on the SNS and through other communal connections. These strong ties, by virtue of their strong community connection, do not often provide the diverse perspectives and new knowledge offered by weaker ties (Donath, 2007). Both contribute to the richness of the
SNS in different ways and consequently, both contribute to the development of relationships via social media.

Social media and SNS provide the technology necessary to establish online communities and social groups. Since social groups or teams have, as one of their essential characteristics, a leader (Hogg, Martin, & Weeden, 2003, p. 20), and teams have become widespread throughout organizations (Kirkman & Shapiro, 1997), social media use becomes central to understanding organizational relationships in contemporary organizations and more specifically, to understanding the leader-follower relationship.

The literature and research completed to date has provided quantitative and qualitative evidence that social media has direct and impactful connections on communications, information sharing and relationships. In the relatively short time that social media has become ubiquitous in contemporary business and social life, it has proven to be very effective in each of these areas. Although considerable research has been done on determining the impact of social media on multiple and varied aspects of organizational behaviour, research connecting it with leadership has been sparse. This is confounding because as I have shown there are strong and apparent connections between leadership and communications, information sharing and relationships. The common associations that social media and leadership have with these elements of organizational behaviour require further investigation.

**Synopsis of Literature Review**

From the preceding review of some of the relevant extant literature on social media and leadership, it can be seen that each has a sound and well-researched
connection to communication, information sharing and relationships. The link to communication can be easily made for social media as it enables users to contact their friends and associates with ease, regardless of geographical or temporal separation (Kim, et al., 2010). This also holds for organizational communications for all stakeholders. However, social media removes previous constraints and allows intra- and inter-stakeholder communication beyond previously held organizational constraints (Seivert & Nelke, 2011).

Similarly, the connection between leadership and communication is well-established. Many researchers have confirmed, quantitatively and qualitatively, the correlation between effective leadership and effective communication (cf. Fairhurst & Connaughton, 2014). The association between communication and leadership has been made using essentially every leadership theory and approach, and it was confirmed by the GLOBE studies that this link transcends cultures and boundaries. With the introduction of social media to the contemporary organization, it becomes necessary to identify how this has impacted communication as it relates to leadership. Currently, there is a gap in the literature in this area.

Equally, the research and literature on social media and information sharing is readily available, as are numerous studies on leadership and information sharing. Through the development and ability to include UGC, social media offers a rich, new and very effective method of sharing information within a social network and between social networks (Kaplan & Haenlein, 2010). This has the inherent ability to influence perceptions inside and outside an organization. Information sharing is equally critical to leadership as it is directly related to a leader’s ability to influence (Huffaker, 2010) and,
like communication; it contributes to the leaders’ role as sensemaker (Maitlis, 2005). The ability to readily and richly share information can impact the leadership dynamic within a group and the development of shared leadership approaches (cf. Pearce & Conger, 2003) address this. What has not been specifically addressed is how leadership roles are effected in the context of social media and how both relate to information sharing.

The relational aspects of social media and leadership respectively are also well-researched. Social media enables the user to establish, build and maintain or end relationships (cf. Boyd & Ellison, 2007) through engagement in SNSs. SNSs offer the ability to reinforce and maintain strong ties while also cultivating and developing weak ties (Lenhart & Madden, 2007). Each of these relational ties offer different perspectives and have complex impacts on the behaviour of the user. This has direct implications for leadership as the behaviour of the follower is key to the relationship between the leader(s) and follower(s) (Hollander, 1992).

The importance of the relationships to leadership has been well researched (e.g., Brower, Schoorman, & Tan, 2000; Graen, 1976). Mary Uhl-Bien proposed a Relational Leadership theory in 2006 that asked a key question “How do people work together to define their relationships in a way that generates leadership influence and structuring?” (p. 668) and she offers that this can be addressed at an individual or collective level. This study seeks to address this question in the context of the introduction of social media in the contemporary organization. The common interfaces of social media and leadership with communication, information sharing and relationships require investigation to determine if any interdependence exists.
The Gap in the Literature

Social media defines the social networks in contemporary organizations. Extending on this theme, this study seeks to fill in a research gap that exists wherein social media, which offers communication, information sharing and relational capabilities, and enables the establishment of social networks and cross-social network interactions, has a direct correlation to the related leadership research. Leadership or more specifically, the relationship between the leader and follower in the 21st century organization has not been studied to determine how leadership is conducted in the contemporary context which includes social media. By examining leadership and the use of social media in a contemporary organization undergoing a significant change, this gap will be addressed by this study.

There has been extensive research regarding the leader-follower relationship (e.g., Graen & Uhl-Bien, 1995). Similarly, research on social media has been very vigorous since its introduction in 2004 with an almost exponential rise in the past four years (e.g., Keitzmann, Hermkens, McCarthy, & Silvestre, 2011). However, research that focuses on social media and leadership in any form is much less abundant. There are studies on developing a personal social media strategy (Dutta, 2010), and the relevance of social media to senior leaders (Deans, 2011) but there are few or no peer-reviewed publications and research on “leadership and social media” or “relationships and social media.”

A Web of Science search combining all three primary terms (leadership, relationship, and social media) produced only 37 relevant peer-reviewed articles, all published since 2010. None of these papers or studies explores how leadership is
enacted in a social media context or the ways in which social media affect the leader-follower relationship. Five provide supporting perspectives for this study and have been reviewed in more depth in this chapter. Most cover unrelated topics that, while interesting have little connection to the topic under investigation here. For example, there are five papers related to social media and politics that explore social media as a PR tool for politicians (Momoc, 2012), the role that social media played in two national general elections (UK - Ampofo, Anstead, & O’Loughlin, 2011; and Turkey - Bayraktutan, Binark, Mutlu, et al., 2014), the use of social media to increase voter participation (Firestone & Hadders, 2012) and an Australian study on how social media was used in the GetUp! movement by the leaders and campaign entrepreneurs to successfully promote their personal stories. Another concentration focuses on the social media and marketing where five papers investigate marketing concerns such as global online marketing strategies (정의섭; 문선주; 김찬호; et al., 2013), luxury brand loyalty and social media users lifestyles (Park, Song, & Ko, 2011), a quantitative study of how YouTube data impacts content propagation in social networks (Yoganarasimhan, 2012), the connection between social media marketing and managing customer relations (Kim & Ko, 2010) and how (oral) communication correlates to influencer construction(Huang, 2014). A third concentration is centred in the health care field with studies looking at using social media to connect patients (Verkamp, 2010), considering whether a physician would benefit by having a social media presence (DeCamp & Cunningham, 2013), and an essay on how social media and informatics are transforming the hospital experience for patients and improving revenue streams (Wagner, 2010).
Others look at how social media has impacted the diffusion of news (Kim, 2011), how the HR profession could use social media to enhance its position as thought leaders within an organization (Ochetan & Ochetan, 2012), how the social media can be used in the Public Relations field (Hwang, 2012; Sweetser & Kelleher, 2011) and a number focusing on the communications aspect of social media, particularly in crises (Atkinson, 2014; Verhoeven, Tench, Zerfass, et al., 2014). Of the five that are of direct relevance to this study, none consider how leadership is conducted in the context of social media or look specifically at the leader-follower relationship in the 21st century reality of a digitally connected world.

This study addresses this gap and investigates the link between leadership and social media by exploring the relationship between the leader and follower in the contemporary reality constructed in part by social media. Thus, it offers practical evidence that provides support for, and adds to established perspectives on leadership, followership, and influence as they pertain to the contemporary borderless organization. It also adds a scholarly perspective to the corpus of leadership knowledge and contributes to the literature on social media, social networking and organizational behaviour and communications.

I approach this by addressing my primary research question:

*How is leadership conducted in a social media context?*

From this review, the primary question can be addressed by looking specifically at the areas of communication and information flow, influence, and perceptions as they relate to the leader-follower relationship. The following secondary research questions focus on these areas:
1.a. How is the communication and information flow within an organization conducted in the context of social media? The introduction of social media has facilitated communication and information sharing between constituents within an organization such that previously established communication paradigms no longer hold. The question relates to how and when messages are transmitted or received – or what is contained those messages.

1.b. How is the influence dynamic within the leader-follower relationship realized in an environment where social media is readily available? Related to the previous question, the presence of social media reduces control of messaging by leaders. This question looks at how leaders influence perceptions and opinions among the members of an organization in a context that includes social media. How does the leader(ship) maintain the role of primary influencer (sensemaker) in the relationships extant within a contemporary organization?

1.c. How are participants’ perceptions of the other actors in the leader-follower relationship affected by the presence of social media? Perceptions of the other in a relationship are a key determinant of the strength of that connection. In an environment where social media is readily available, how are the actors in the relationship influenced and impacted by the information available on social media? And what does this mean for both parties in the relationship?

In this literature review I have provided a perspective on the relevant literature in order to situate this study in the understanding of leadership and social media. This led to the formulation of the research questions that will be the focus of this study. In the next chapter, Methodology, I explain the approach I took and the methods I used to address these research questions and explore how leadership is conducted in a contemporary organization where social media is part of our reality.
CHAPTER 3 – METHODOLOGY

Background

In the previous chapter I reviewed the literature that has the most direct relevance to this study: that on leadership and social media and their association with communication, information sharing and relationships. The review has enabled me to position my research in the gap left essentially unexplored by other research to date. I will achieve this by addressing the primary research question *How is leadership conducted in a social media context?* and the associated secondary questions:

1.a. How is the communication and information flow within an organization conducted in the context of social media?
1.b. How is the influence dynamic within the leader-follower relationship realized in an environment where social media is readily available? and
1.c. How are participants’ perceptions of the other actors in the leader-follower relationship affected by the presence of social media?

In this chapter, I discuss in detail the research strategy and methodology that I adopted to answer my primary and secondary research questions. This includes describing the ontological and epistemological positions I adopted, my choice of research strategy, and the methods I used to gather and analyze the data. An important part of understanding why I chose this approach is explained in my reflections of conducting this research, which are included throughout this chapter.

As Bryman and Bell (2011) posit in their chapter on Business Research Strategies, there are five influencers on business research: Theory, Personal Values, Practical Considerations, Epistemology, and Ontology (p. 29). I will examine each of these influencers in describing how I chose and implemented the methodological
approach used in this study. In the next section, I explore the epistemological and ontological perspectives that I applied in this study and I reflect on how my personal values and mental models influenced the choice of these fundamental elements of research. With this established, I explain how these influenced my research strategy and take into consideration the practical aspects of the context within which the study was conducted. I then offer a description of my research methods, including a detailed explanation of how the interview instrument connects with the research questions. This is followed by an account of the data collection processes and the subsequent analysis and connection with the literature. Throughout the chapter, I reflect on how I personally affected the research and was personally affected by the research. At the end of this chapter, I gather those reflections as a way of collating them for consideration in future research.

**Research Philosophy and Assumptions**

In this section I will describe the philosophical underpinnings that drove the selection of my research design and analysis. A review of the leadership literature reveals two distinct camps on how best to research the phenomenon of leadership. A positivistic/post-positivistic approach that employs a scientific paradigm employing reductionist (primarily quantitative) techniques to explain cause and effect relationships between a leader’s action and an organizational outcome – or a naturalistic/constructivist paradigm that uses primarily qualitative methods that consider the interrelatedness and interdependence of the actors, the context, reality and the observer. While each paradigm has its merits, from my personal research on leadership it is evident to me that leadership is a process embedded in our interactions with each
other and within the world in which we live (see definitions of leadership selected as the foundations for this study for more eloquent descriptions). Thus, for me, it becomes impossible to understand leadership by removing or reducing it to specific variables because each variable within the entire system impacts all of the others in some manner. This interdependence leads me to adopt a social constructivist perspective.

Constructivists hold that meaning is constructed through our interactions with each other and with the world and we categorize (make sense) of this through a lens crafted by our experience and social perspectives (cf. Berger & Luckmann, 1966; Lincoln & Guba, 2000). Combining my social constructivist approach to leadership and focusing on the relationships and perceptions of the actors, this research required an approach that accepts that our reception of information is interpreted through a lens shaped by our previous experiences and knowledge (Fleetwood, 2005). Consequently, I have chosen a qualitative approach that provides a more holistic and richer appreciation of the data and its analysis. This is in concert with Guba and Lincoln (1982), who argued that “[f]inding a paradigm that can tolerate real world conditions surely makes more sense than manipulating those conditions to meet the arbitrary design requirements of a paradigm” (p. 234).

The ontological position I have adopted is aligned with those who see leadership as a social construction (e.g., Fairhurst & Grant, 2010; Grint, 2005; Meindl, 1995; Uhl-Bien, 2006). As such, in order to study it effectively, I sought to understand the relationships and human interactions that occurred in the complex and dynamic process of leadership.
By starting from the assumption that reality, society and self are socially constructed, my research reflects this in its symbolic interaction approach to studying leadership. “Symbolic interactionism assumes that human action depends upon the meanings that people ascribe to their situations. These meanings derive from shared interactions …” (Charmaz, 1990, p. 1161). Consequently, my principal approach was through the gathering of qualitative data that provides insight into the perceptions, reactions, perspectives, and interactions of the actors.

As one of the initial steps of this study, I sought to position it within existing literature on social media and leadership. This is when I identified the gap and thus decided to adopt a quasi-grounded theory approach. Combining this with the constructivist ontological position I had taken required a constructivist grounded theory approach which drew me to the work of Kathy Charmaz (1990) wherein she describes the ‘grounded’ nature of the constructivist grounded theory as:

three-fold: (1) researchers attend closely to the data (which amounts to ‘discoveries’ for them when they study new topics or areas), (2) their theoretical analyses build directly on their interpretations of processes within those data, and (3) they must ultimately compare their analyses with the extant literature and theory” (p. 1165).

In later work, Charmaz (2006) discusses that constructivists generally seek to get as close to inside the experience as possible which rang true for me as I had a unique opportunity to study a phenomenon within an organization with which I had had direct and lengthy experience (RCAF) and in a location in which I was immersed on a daily basis for my primary job. The combination offered a rare opportunity in which to conduct constructivist grounded theory research. I elaborate on this opportunity further below.
Constructivist grounded theory approach is centred in the interpretivist traditions (Charmaz, 2006). This also aligns very well with my personal epistemological perspective and reflects what I have adopted in this study. An interpretivist epistemology provides a liberal approach that acknowledges the relative nature of truth. Truth is relative to a person or a culture and when conducting research with humans (particularly qualitative research) it is important to remain cognizant of this relative perspective. The perceptions and interpretations of an individual are as true to them as an opposing view is to its source. The importance of this for this study is in the adoption of an inductive research methodology that takes into account the relative nature of truth when exploring the leader-follower relationship in the a context where social media is a factor.

The interpretivist approach to knowing and gaining understanding (epistemology) requires the researcher to interact and in some ways, become interdependent with the research participants (Guba & Lincoln, 1994). My background and position relative to the participants at the time of the study enabled a depth of interaction and interdependence that added to the understanding and the richness of the data. This does not mean that I can fully understand the ‘truth’ or ‘reality’ as they see it, for I have my own perceptual lens shaped by my experiences. It does however, enable me to interpret the meaning behind their words and actions in a manner that is more reflective of their truth/reality. In essence, I am interpreting their reality by constructing my own reality based on their construction of their own realities (Geertz, 1973; Schwandt, 1994). That said, it must be made clear that the interpretation of the data that follows was done
through my personal lens, impacted by my mental models and experience and should be considered on this basis entirely.

**The Selection of the Case**

I conducted this study, as described in the introduction, within a unit of the Canadian Forces (CF) for a number of reasons. First and foremost, the research questions that were developed from completing the literature review induced me to seek a situation where I could explore how leadership was conducted in a context where social media was a ‘new’ entry into the context and a primary means of communication within the group. I needed a situation where the introduction of social media would be discernible in terms of how the participants interacted. By that I mean, the use of social media was relatively new to the organization and thus I sought an organization that had been established prior to the advent of social media. I knew from my research and my experience that a government institution, such as the military would fit my research needs very well. I also wanted to be clear I was examining leadership so I sought a situation that involved change because leadership is about dealing with change (Kotter, 2008).

The military, as a bureaucratic, hierarchical institution with well-established protocols and practices, especially as they relate to leadership, communications and information-sharing was an ideal fit for this research. My initial assumption was that the introduction and adoption of social media into their procedures and practices would present a significant challenge for an institution with such ingrained bureaucratic policies and procedures. I assumed that because of these established policies and practices discerning how social media was introduced and how it influenced leadership
would be readily achieved. As it turned out, the CF was more adaptable than I had anticipated.

I chose to use a single case to study as I was exploring a phenomenon that had not previously been studied and I had a unique situation in which to observe and document how leadership is effected in the context of social media. I saw, and still see this as a first step in developing further research and understanding and theory around leadership in the 21st century context. All of these factors (cf. Yin, 1994) supported the selection of this particular case for my study.

**The Influence of My Personal Perspective**

Before I discuss my Research Strategy in the next section, I think it is valuable at this point to describe my personal connections to the study to understand how it informed and influenced the strategy chosen. I conducted my research within the CF generally, and within the Royal Canadian Air Force (RCAF) specifically. As the primary researcher, it is important to highlight the fact that I am a retired member of the Canadian Forces with 30 years experience as an officer in the RCAF8. As an ex-Air Force officer, I brought an in-depth understanding of the culture and structure of an Air Force unit to the study. The terms and nuances of the lexicon used by the participants were familiar to me in a way that can only be gained through years of being immersed in the same environment. This was critical to understanding the ‘meanings behind the words’ that were expressed during the interviews. This connection was key as it enabled me to gain access and develop a level of trust with the participants that are not

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8 The Air Force branch of the Canadian Forces reverted back to the Royal Canadian Air Force (RCAF) in 2011 but while I served in the Air Force it was Air Command within the Canadian Force (CF). Throughout I will use RCAF as it reflects the institution more accurately and is more current.
often afforded to one from ‘outside’ of their community. This resulted in a degree of
candor in the responses that would not likely have been provided otherwise.

Additionally, this understanding of the culture and structure enabled me to tailor
my semi-structured interview questions in an effective manner that derived direct and
relevant responses from the participants, including their openly suggesting additional
potential interview candidates. When reflecting on the responses from the initial round
of interviews, I was able to modify and adapt the questions to delve deeper into
unanticipated areas of inquiry that emerged. Without an in-depth understanding of the
culture and ethos of the participants, these additional research lines of inquiry may have
been overlooked or not explored with the same rigour, resulting in a less complete
picture of what was happening in the context of the study.

This ‘close’ connection to the subjects and organization under study may have also affected my personal understanding of the information presented in a negative
manner. That is, since I entered the study with some preconceived ideas and
perspectives of the RCAF, its members and operations, I was expecting certain
responses and reactions. It is possible that this connection may have affected the type
of data I collected and was offered by subconsciously influencing the respondents
(Chew-Graham, May, & Perry, 2002). Conversely, my prior knowledge and pre-formed
mental models may have impacted how I interpreted the data and reacted to the
participants’ responses and/or observed reactions. McGhee, Marland, and Atkinson
(2007) studied this in considering how it (and conducting an a priori literature review)
may impact grounded theory research. They concluded that the constant comparison
process of a grounded theory approach requires an integral element of reflexivity and
that this reflexivity is a key to overcoming the potential to jeopardize the data collection and analysis. Throughout this study, I maintained a reflective journal and remained cognizant of the potential for my biases to affect my interpretation of the data. In this way, I sought to minimize the potential negative impacts of my connection with the target population and situation.

Finally, one of the premises of the leadership definitions that form the basis for this study is that leadership resides in the perception of the participants in the relationship. My background and connection to the participants garnered as a result of my having been ‘one of them’ enabled a deeper appreciation of their perceptions, thus enhancing my understanding of the leader-follower relationships during the period under study.

During my career in the Air Force I spent eight (8) years at locations outside of Canada and one year at the location where the research was primarily conducted. Since the research was conducted on RCAF personnel stationed at the NATO Air Base in Gielenkirchen, Germany from 2011-2013, this factor is relevant to the study in two important ways. First, as a member of the RCAF, being posted outside of Canada puts you in a unique environment. There are a number of expectations and demands placed on you that are not extant at a base in Canada. Additionally, there are opportunities and shortcomings that are distinctly different at each location and from those available within Canada. These include but are not limited to housing, transportation, language, travel, promotion, and media, for example. As with any location, some are advantages and some disadvantages dependent on the personal perspective of the individual.
One of the unique aspects of being posted outside of Canada that was common to all positions was the role of ‘ambassador’ that was inherent in every position. Each Canadian was considered an informal ambassador and was expected to act accordingly by displaying the best attributes of what it means to be Canadian. Having been an ‘ambassador’ for Canada, and having experienced the pros and cons of being posted outside of Canada, I could relate directly and intimately with the participants. I had been there, and more importantly I had been in (and was now in) Geilenkirchen (informally referred to as GK). This impacted this study in a number of ways which will be discussed in more detail throughout this chapter and in the data analysis chapter which follows.

Being posted to GK was in itself a distinctive opportunity due to the uniqueness of the job and the relationship with NATO. It was a highly sought after posting and only those in the upper tiers of merit in the RCAF were considered for a posting to GK. Through circumstance, I was working in close proximity to RCAF members at the NATO base in GK. This provided me unfettered access to observe the actions and the reactions of the members being affected by the change at the contextual center of this study. It also enabled me to fully understand what it meant to live and work at GK. This added significantly to my ability to understand and interpret some of the respondents’ perspectives more fully.

Although I was working in close proximity to this group, it is important to note that I was not a part of the group, nor did I in any way influence or have influence over any member of the group. As I was a civilian and the group members were all military, I did not hold any position of power over any of the members. This enabled participation by
Practical Assumptions

From a practical perspective, I assumed that social media had an effect on the leader-follower relationship in the context under study. I anticipated that this impact would be manifested in how leaders and followers interacted, and in how they perceived themselves and each other. Similarly, I intuitively assumed that social media had affected the control and flow of information within the organization. As such, I assumed that this change in how information was controlled would affect the influence dynamic as it related to the leader-follower relationship. I also assumed that there were other unanticipated effects of the introduction of social media. These assumptions contributed to my adoption of a quasi-grounded theory approach so that I could remain open to exploring these as they emerged during the research. This is explained in further detail in the following section when I uncover how I developed my research strategy for this study.

Research Strategy

In this section I discuss the research strategy that I adopted in developing the methods I used during the study. Using my constructivist ontology and my interpretivist epistemology as the basis for my strategy, I offer further detail on how and why I selected the methods and approach used in this study. My reflections and personal preconceptions toward the subject matter and the research are included as part of the detail below.
As previously stated, the constructivist ontological perspective I chose drove me to ask how leadership and organizational relationships are developed and maintained after the introduction of social media and further, to understand why it is conducted in this manner. Asking how and why type questions are in the nature of constructivists (Charmaz, 2006). Similarly, my perception of leadership as being socially constructed in the relationships between leaders and followers required a research strategy that enabled me to gather information about that relationship.

From my literature review I knew that there had been little or no research done on this specific question, consequently I adopted a qualitative approach (Creswell, 2009). Prasad and Prasad (2002) indicates that a qualitative approach is warranted when the researcher is seeking to understand an organizational phenomenon that is socially constructed. As I was exploring new ground in the leadership field, I understood that first I would need to try to understand the phenomenon before I could begin to construct theory. This led me inexorably to a qualitative approach to gathering data.

Although ontology and epistemology do not necessarily lead to specific research methods (Denzin & Lincoln, 2000), my constructivist view of leadership would not be satisfied with a quantitative method that reduced the relationship to a set of variables related to cause and effect. In adopting a relational approach to leadership, I was seeking to understand relationships by delving into the conversations to discover the meaning behind the words (cf. Alvesson & Kärreman, 2000). The perceptions of the actors in the relationship were equally important in gaining an appreciation for the salience and value of the relationship to each (Meindl, 1995). This study provided an opportunity to explore this phenomenon in a real-life context. Understanding
conversations, perceptions, meaning behind the words, all led me to select a qualitative approach that would allow participants the opportunity to tell their stories.

To be even more precise, I selected a subset of qualitative research - that of interpretive research. Interpretive research requires that one “start from the position that our knowledge of reality, including the domain of human action, is a social construction by human actors” (Walsham, 2006, p. 320). Since this was perfectly aligned with my personal perspective, I adopted this approach and I acknowledged my role in the process, particularly in interpreting the data during the collection and analysis phases.

Another important aspect of interpretive research is summarized by Prasad and Prasad (2002) in the introduction to a special edition on Interpretive Research when they state:

The goal of the researcher, therefore, is not to capture some pre-existing or ready-made world presumed to be available out there but to understand this process of symbolic “worldmaking” (Schwandt, 1994) through which the social world is ongoingly accomplished. This ontological and epistemological commitment is at the heart of interpretive research and renders positivistic questions about its reliability and generalizability somewhat pointless (p. 7)

Thus by choosing this strategy, I am clearly and definitively setting this study apart from a quantitative, positivistic study and squarely placing it in the qualitative, constructionist, interpretive arena. This is the best approach to understand how the relationship between leader and follower in a contemporary organization is developed and maintained when social media is present. The question of generalizability of the findings is addressed in the concluding material.
Combining this interpretive approach to this study with the previously identified dearth of research in this particular area of study, I determined that the most appropriate method for this study was to use a grounded theory approach insomuch as it provided the structure to gather and simultaneously interpret data. I understood that this was an exploratory study and that I would not be developing theory from this study. The approach espoused in grounded theory provided the structure around which I could conduct my exploratory research.

Traditional grounded theory was first proposed by Glaser and Strauss in 1967, when they sought to understand what was happening instead of trying to fit what they observed into extant theories. Using their approach, the researcher conducts the research before conducting a review of the literature to determine if and where the observed phenomenon fits. Doing research without a priori knowledge of the relevant literature enables the researcher to allow the theory to fit the data and not vice versa.

Because I completed a research proposal, which required a literature review, in advance of conducting my research, I was not technically conducting true grounded theory research as proposed originally by Glaser and Strauss (1967). However, Strauss went on to develop his perspective on the use of literature, which differed from that of Glaser. This can be seen in Strauss and Corbin (1990) where they offer some advantages of conducting a literature review in the early stages of grounded theory research to stimulate ideas for inquiry, and to focus theoretical sampling. Suddaby (2006) concurs and questions whether reasonable research can even be attempted without prior knowledge in the field under study. McGhee, Marland, and Atkinson (2007) compared two grounded theory research studies, each of which employed one of the
contrasting approaches regarding when to conduct a literature review. They conclude that the most important thing to maintain when conducting grounded theory research is that the theory must emerge inductively from the data regardless of when the literature review is conducted. Locke (2001) concurs with this sentiment when she suggests, “Whatever style researchers arrive at for helping them to think creatively about what is happening, as always, insights generated must be worked out in relation to the data” (p. 91) and not the other way around. Hence, using the term grounded theory to describe my approach is applicable, although modified somewhat from the intent of the original (i.e., Glaser & Strauss, 1967).

Charmaz (2006) offers a constructivist grounded theory approach, which is the approach that I have adopted in this study. A constructivist grounded theory approach differs from the classical grounded theory method proposed by Glaser and Strauss (1967). They described an inductive method of data collection and analysis that enabled the researcher to induce the connections between the data and extant theory and/or research aims as they emerged during the study rather than ‘forcing’ the data to align with established theories or prescribed hypotheses. Grounded theory as described by Glaser and Strauss maintains that theory emerges from the data as it is collected and analyzed independent of the observer.

Charmaz (2006) extends the Glaser and Strauss grounded theory approach by providing a constructivist approach in which the researcher is intimately involved in the process because “[w]e are part of the world we study and the data we collect. We construct our grounded theories through our past and present involvements and interactions with people, perspectives, and research practices” (p. 10 emphasis in
A constructivist grounded theory approach aligns perfectly with my constructivist epistemology and interpretive ontology.

A constructivist, modified grounded theory approach enabled me to simultaneously collect and analyze data as it emerged during the study as per regular grounded theory and it allowed me to let any new lines of inquiry emerge from or fit with the data. However, unlike the grounded theory approach advocated by Glaser and Strauss (1967), I am seeking primarily to explore in an attempt to understand how the relationship between the leaders and followers in a contemporary organization is achieved in the context of social media and not seeking a specific goal of developing new theory. This is an exploratory study and much work remains to be done before theory can be developed regarding this subject.

The selection of this research strategy led to the development of specific data collection methods and to an informed approach to data analysis. In the next section I provide a detailed explanation of the data collection methods that were developed and implemented as a result of this strategy.

**Data Collection**

When the idea for this study first emerged, I made some initial assumptions (described earlier) regarding the context within which I would conduct the study: the Royal Canadian Air Force (RCAF). In essence, I assumed that social media has had an effect on the leader-follower relationship. These assumptions affected how I approached the study by influencing the construction of the interview instrument and colouring how the questions were presented to the participants. Similarly, they were manifested in my verbal and non-verbal responses to the participants’ perspectives and
responses. In most cases, this was beneficial as it improved the connection between me and the participant as it built up the level of trust and opened new avenues of questioning. The opposite effect may have occurred but I did not observe it.

The data collection consisted of three different methods – semi-structured interviews, qualitative observation, and document review. I will now provide an explanation why these methods were chosen and how they were conducted.

**Semi-structured Interviews**

I chose semi-structured interviews for a number of reasons. I knew that I needed to get the stories from the participants’ point of view. I wanted their perceptions, reactions and feelings about how social media had affected how they communicated, shared information and how they related to each other and to the leadership. Creswell (2009) indicates that interviews provide information and data that is filtered through the personal lens of the participant which is precisely what I was looking for. The question was what type of interview would be best suited for this research – structured, semi-structured or unstructured?

Considering that I had already decided on a qualitative approach for the reasons outlined above, my focus was on the participant and not on me, the researcher, and I wanted to provide a situation where the participants stories could unfold in a way that allowed unanticipated information to emerge. Thus, I did not choose a structured interview as the most appropriate method for my research. Therefore, it was a decision whether to go with semi-structured or unstructured interviews.
Unstructured interviews, although an excellent method for gathering the interviewee’s perspective and story, lacked the level of discipline I was seeking. While I was very interested in the participants’ stories, recollections and perceptions, there were specific topics that I needed them to cover so I could position their responses in relation to my research questions and relative to the other participants’ responses. In a semi-structured interview “[t]he researcher has a list of questions on fairly specific topics to be covered ... but the interviewee has a great deal of leeway in how to reply” (Bryman & Bell, 2011, p. 467). This fit my needs perfectly as I also wanted to leave open the possibility of exploring new and unanticipated avenues of inquiry as they arose. Consequently, I chose the semi-structured interview as the primary data collection method.

The semi-structured interview provides a flexible yet focused means of gathering data. It affords both parties in the interview the opportunity to expand or deviate from a prescribed instrument while maintaining a scope or range that keeps responses and questions relevant to the research (Bryman & Bell, 2011). The researcher is seeking rich, detailed answers that can add to his/her understanding of the topic under investigation (Creswell, 2009). In keeping with constructivist grounded theory approach, semi-structured interviews allowed me to ask new questions and explore emerging data to determine if there was information that would add to my understanding of the situation under investigation. Additionally, this approach allowed me the opportunity to revisit specific participants to clarify and add to their responses in light of codes or categories that emerged from other interviews during the study. There are however, disadvantages to this method of data collection. As Creswell (2009) points out, the mere
presence of the researcher can influence the participants’ response, and not every respondent provides the same level of clarity or depth of perception. As a researcher, I was fine with proceeding with the semi-structured interview despite these potential limitations because I was confident in my ability to discern the meanings intended by the respondents due to my experience in the RCAF and I was equally secure in my capability to generate a comfortable and safe environment for the interviews.

Having made that decision, I was now faced with developing an interview instrument that would enable my participants to tell their story without restriction while still eliciting answers to my research questions. I started, as Lofland and Lofland (1995) suggest, by asking myself: “Just what about this thing is puzzling me?” (p. 78) and used my own answers to develop questions relevant to my study. As per Bryman and Bell (2011), I developed the questions to elicit perspectives, feelings, descriptions, and reactions from the respondents and I placed an emphasis on seeking to understand how the participant framed events and their recollections of those events. Since I was coming into the study with an in-depth understanding of the background, culture and in some cases, personalities of the participants, I developed the interview questions to provide space and opportunity for them to tell their stories.

My initial assumptions (described earlier) informed the development of the initial interview instrument used during the study. In this iteration, in addition to gathering data, I was seeking to uncover and explore the validity of my assumptions. I developed two similar but different interview instruments – one for those I had identified as leaders and
one for those I classified as followers\(^9\). The difference between these two instruments was essentially the perspective from which a question was asked (see Table 2 for examples). Focused on the research questions, the interview questions were designed to elicit responses that would reveal the participants’ perceptions and understanding of the situation as it unfolded. In particular, the questions sought to generate disclosure regarding how they reacted to the situation and to their leader or followers respectively during the uncertain circumstances surrounding the withdrawal of Canada from the NATO AEW&C Force and how these circumstances and reactions affected their relationships. Throughout, the role of social media was tied into these questions.

After having my interview instrument reviewed by an independent reviewer for relevance in the NATO context, I was prepared to trial it on real participants. The initial instrument developed based on my assumptions was used exclusively during the first three (3) interviews, which became essentially a pilot study. It served its intended purpose well in that the participants were encouraged and able to respond openly about the circumstances and their perceptions of the leadership during the period under study. It also revealed that there were additional areas of inquiry that needed to be explored. Specifically, it became apparent that the maturity and experience of the followers was a significant factor in how the relationships evolved and were sustained. This prompted a modification to the interview instrument to enable the exploration of the significance of the maturity and experiences of all parties in determining how the organizational relationships played out in the context of social media.

\(^9\) As described in detail later, I identified the leaders as those who were on the leadership team of CCNAEWF – that is, those who met with Commander regularly to make decisions regarding the contingent and the withdrawal. The majority of the remainder were considered as followers for this study. Some participants were asked questions as leaders and as followers due to their responses and their position in the CCNAEWF hierarchy.
Similarly, it emerged from the interviews that there were a number of external stakeholders impacted by the Canadian decision to withdraw. These included primarily the families of the military members and their associated social and professional networks such as schools, clubs, employers, and landlords. While these external stakeholders were not directly involved within the scope of this study, their influence on the players within the leader-follower relationships under study was of interest. Consequently, I modified the interview instrument to enable exploration of this aspect of the participants’ perspectives and what part social media played when considering the external stakeholders.

The second iteration of the instrument was used for the next eight (8) interviews. In addition to the questions on how their maturity and experience impacted their responses, the way the questions were posed enabled me to explore other ideas that I uncovered during my review of the first three interviews. By rearranging and re-emphasizing certain aspects of some questions (e.g., probing how social media was used by the members and not just if they used it) I was able to discern the relative importance of social media to the group in general and their aversion to using it for work-related communication. What surfaced from this line of inquiry added support to the importance of maturity and experience and provoked a further change to the interview instrument. Expressly, it meant adding a question that probed the perceptions of social media in general and a question on the ways they used social media irrespective of the withdrawal. My review of the second round of interviews also prompted a revisit to two of the interviewees of the first round to gather their
perspectives on the added lines of inquiry around maturity, experience, and social media use.

The third and final version of the interview instrument was used for the last four (4) interviews. It proved to be quite effective in gathering data and providing ample opportunity for the participants’ stories and perspectives to come out. One of the second-round interviewees was re-visited with the new interview instrument as I felt he could offer a valuable perspective based on the additional/modified questions. The final version of the interview instrument is at Appendix A. Table 2 below provides a mapping of the research questions to the interview questions, while the instrument I used in the field did not.

<table>
<thead>
<tr>
<th>INTERVIEW QUESTIONS AND ASSOCIATED RESEARCH QUESTIONS</th>
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<tbody>
<tr>
<td><strong>Section 1 – Housekeeping, Stage Setting /Closing</strong></td>
</tr>
<tr>
<td>1. Introductory remarks – including context of study, structure and time of interview, voluntary participation (in whole or in part), consent form, recording method, and use of responses.</td>
</tr>
<tr>
<td>2. Opportunity for questions by the participant</td>
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<tr>
<td>3. How long have you been at NAB Geilenkirchen?</td>
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<tr>
<td>5. How long have you been in the military? Can you briefly describe your career?</td>
</tr>
<tr>
<td>20. Do you have any other comments you would like to add or questions for me?</td>
</tr>
<tr>
<td>1.a. <strong>Section 2 - Relates to Research Question 1.a.</strong> How is the communication and information flow within an organization conducted in the context of social media?</td>
</tr>
<tr>
<td>The introduction of social media has facilitated communication and information sharing between constituents within an organization such that previously established communication paradigms no longer hold. The question relates to</td>
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how and when messages are transmitted or received – or what is contained those messages.

6. For Follower - Please, in your own words, describe the leaders/leadership structure of the Canadian contingent at NAB Geilenkirchen – in terms of structure, communication, influence, effectiveness
Leader - Please describe your position as the leaders/leadership of the Canadian contingent at NAB Geilenkirchen.

7. How did you first hear about the announcement regarding the Canadian withdrawal from the NATO E-3a programme? Leadership? Other? Was this the normal method of receiving news/information? If not, how did it differ?
Leader – Please describe how you transmitted your knowledge about the withdrawal to your followers.

8. Was social media a method of obtaining and deciphering information regarding the withdrawal? If so, please describe the role social media played in how you gathered information about this issue. If not, why not?

9. Are you a frequent user of social media? If so, what types of social media do you use (e.g., Facebook, Twitter, email, other)? For what purposes? If not, why not?

10. In your own words, please describe how the leadership provided information regarding the withdrawal. Was this different from the norm? Was it an effective method? How could it have been done better? What did you like best about how the information was transferred?
Leader – In your own words, please describe how the followers reacted to the information regarding the withdrawal. What was your perception regarding this reaction?

11. Were there instances when rumours spread through channels such as social media caused stress and confusion within the contingent? If so, please describe your perceptions of these situations, including the reasons and your reaction/action to resolve the confusion.

12. As decisions were made regarding the withdrawal, what was your most reliable source of information? Why?

Section 3 – Relates to Research Question 1.b. How is the influence dynamic within
the leader-follower relationship realized in an environment where social media is readily available? Related to the previous question, the loss of control of messaging intuitively must impact the ability to influence perceptions and opinions among the members of an organization. Does this diminish or just alter the ability of the leader(ship) to be the primary influencer (sensemaker) in the relationships extant within an organization?

11. How did you first hear about the announcement regarding the Canadian withdrawal from the NATO E-3a programme? Leadership? Other? Was this the normal method of receiving news/information? If not, how did it differ? What was your reaction?

12. Was social media a method of obtaining and deciphering information regarding the withdrawal? If so, please describe the role social media played in how you gathered information about this issue. If not, why not?

13. In your own words, please describe how the leadership provided information regarding the withdrawal. Was this different from the norm? Was it an effective method? How could it have been done better? What did you like best about how the information was transferred?

14. As decisions were made regarding the withdrawal, what was your most reliable source of information? Why?

15. Were there instances when the information received via social media contradicted the information provided by the leadership? In your own words, please describe instance(s) when this occurred and how you reacted.

16. Which source did you trust more – social media or the leadership or other? Why?

Section 4 – Relates to Research Question 1.c. How are participants’ perceptions of the other actors in the leader-follower relationship affected by the presence of social media?

If social media has impacted the leader(ship)’s ability to be the primary sensemaker in an organization, has this changed how followers perceive the relationship with their leader(s)? If so, in what way(s) and what does this mean for both parties in the relationship?

17. Were there instances when the information received via social media
contradicted the information provided by the leadership? In your own words, please describe instance(s) when this occurred and how you reacted.

18. Which source did you trust more – social media or the leadership or other? Why?
19. Did this sequence of events affect how you viewed the leader? If so, please describe how it affected your perception of the leader(ship).

Table 2 – Mapping the Interview Questions to the Research Questions

As can be seen in Table 2, the interview instrument was slightly modified for questions posed to leaders and those posed to followers. In order to capture their respective perspectives, it was important to initiate dialogue differently with each group. Although, all members of the contingent were leaders in some capacity, it was my delineation of each prior to and during the interviews that determined which set of questions were presented.

It was challenging to separate the participants into the two categories of leader and follower. Due to the nature of their jobs, their position, rank, and background they all at one time or another had been or were currently leaders. In the end, I made the choice based on who was on the decision-making team during the course of the withdrawal. The decision-making team was comprised of five (5) individuals of varying ranks who met regularly to discuss the strategy and approach that would be taken regarding the withdrawal. In this way, my previous experience and knowledge affected my perspective and coloured the research and consequent results, which is an inherent factor in qualitative research (Bryman & Bell, 2011; McGhee, Marlin, & Atkinson, 2007).

The primary differences in the questions posed to each group can be found in asking about their perceptions and reactions. A prime example of this can be seen in the penultimate questions where the leaders were asked about the effect the sequence
of events had on their perception of the follower(s) while the followers were asked about the impact on their perceptions of the leaders. Additional or different questions were also asked of each group. For example, the followers were asked about how they received information about the withdrawal and if it affected how they viewed the leadership. Knowing how the information was transmitted, the leaders were asked instead about how they perceived the followers’ reactions to the information when it was transmitted. Thus, dialogue was not initiated in the same manner with each group.

Interestingly, although different questions were posed to each group, their responses covered similar territory and perspectives. As the interview sessions were designed to let them tell their stories within certain constraints set by the questions, each respondent added their perspective on a wide range of topics and elements relevant to the situation under study. Their free-form responses reduced the impact of my preconceived ideas regarding leaders and followers within the contingent. This is discussed in more detail in the Data Analysis chapter which follows.

The semi-structured interviews were the primary method of data collection and they were augmented with Qualitative Observation and Document Review to provide additional perspectives and information to inform the data and its analysis. This was done to triangulate the findings by corroborating or negating them based on information available from different sources (cf. Bryman & Bell, 2011). As per Jick (1979), I used multiple data collection methods that each provide a unique perspective on what transpired and how people reacted. Triangulation serves to make the conclusions easier to reach, more robust and improves their clarity and relevance (Scandura & Williams,
2000). With this in mind, I will now discuss how and why data was collected using the Qualitative Observation method.

**Qualitative Observation**

Direct observation of the individuals under study is a well-founded qualitative method for collecting data in the field, a characteristic of qualitative research as described by Creswell (2009). I chose to add observation as a research method for number of reasons. Other than triangulation, which is described above, I thought it important to observe the actions and reactions of the members of CCNAEWF in order to put their interview responses in context and to gather data and impressions that were unadulterated by the personal lens of the participants. Through my own observations of the situation and participants, I was able to garner a better understanding of when the participants were presenting a biased view, or when they had neglected or enhanced their recollection to fit their personal needs (Fitzpatrick & Boulton, 1994).

Bryman and Bell (2011) explain that there are essentially three types of observation research: Structured (or systematic), participant, and non-participant (or unstructured). Structured observation requires the researcher to have a set of prescribed rules to guide the observer on what to look for and how to record it. This implies / requires a preconceived set of observation criteria and goals that the observer is seeking to observe and measure or quantify. As this runs counter to my research approach and my ontological and epistemological perspectives, I did not use structured observation technique.

My observation technique falls somewhere on the continuum between participant observation and non-participant observation (see Fig. 2). The difference between the
two is subtle as different authors have defined each in slightly different ways (cf. Atkinson & Hammersley, 1994; DeWalt & DeWalt, 2010). The differences in the definitions reside primarily in the level of participation that the observer assumes while conducting the research. Becker and Geer (1957) see participant observation a longitudinal participation in daily events while Dewalt and Dewalt (2010) concur in principle with this, they add that the observer can use it as a means of understanding the culture of the participants under study. Full participant observation is most often employed in anthropological or ethnographical studies, which this study is not. I would not classify my observation as full participant observation for reasons I will explain in the following paragraphs.

Figure 2. Participation / Observation Continuum

In my position at NATO Air Base Geilenkirchen, I worked on a daily basis with the members of the Canadian contingent under study. I was able to observe their actions and reactions, and the actions and reactions of others in the NATO community, as they pertained to the Canadian withdrawal from the NAEW&C Force. I did not participate in the daily activities of the Canadian contingent as my role was in a civilian capacity within the headquarters of the NATO base, external to the contingent. This would be more in line with what Fitzpatrick and Boulton (1994) termed as non-participant observation which “allows the researcher to remain as an accepted outsider, watching and recording the interactions” (p. 110). The Canadian contingent certainly
knew of my presence since all Canadians were known to each other within the relatively small community. Thus, I was not a participant but I was not exclusively an observer either.

My role as a senior (civilian) officer within the NATO Base hierarchy provided me access to a wide range of formal and informal meetings. I was present at ceremonies, social events and informal gatherings of community members. Additionally, I played on the Canadian hockey team representing GK (comprised in large part of members from the Canadian contingent), which offered a frank ‘locker room’ perspective as events were unfolding. This access provided constant and continuous opportunities to observe how the Canadians (leaders and followers) were acting, interacting and reacting to developments pertaining to the withdrawal. I was privy to formal announcements at Base and at NAEW Force-level leadership meetings and to informal conversations between and with Canadians at all rank levels. These could be classified as ‘conversational interviews’ which took place over a period of time but contribute to the whole picture (as per Dalton, 1959). This allowed me to observe for myself what was going on, and it helped in understanding and positioning the data received during the interviews. On the continuum in Figure 2, I would place my research activity closest to Observer as a Participant, since I was participating in the daily activities on the base but I was not deeply involved with the daily activities of the Canadian contingent under study.
During the period of purposeful observation\textsuperscript{10} I kept field notes on what I observed and used these notes to aid in the development of the interview questions and to focus the document review. The field notes mainly consisted of anecdotal recollections of events, conversations or observations of decisions, announcements and the subsequent reactions of the Canadian contingent and leadership. As with the selection of leaders and followers for the interviews, these notes were recording my perceptions through my personal lens shaped by my experience, expectations and knowledge. Thus, when I used them to inform the interview questions and the subsequent data analysis, I was seeking to confirm or add to what I already thought to be the reality I had constructed. In some cases, this was borne out by the other data, and in others, I had to adjust my perceptions to make sense of what I had observed and collected. More detail on this process is provided in the Data Analysis chapter. Next I will describe the document review process I conducted as a part of this study.

\textit{Document Review}

To augment the interviews and observations conducted in this study, I also conducted a review of relevant documents that could add to understanding the context and how these impacted participants’ perceptions of what was happening during the period under study. A document review as a research method can provide important background information and historical descriptions of organizations and situations, offer insights into decisions and help understand the sequence of events as they transpired in the situation under study (Bryman & Bell, 2011). Scott (1990) classifies documents

\textsuperscript{10} I was at NATO Air Base Geilenkirchen for one year (August 2012 – August 2013) during which time I observed the Canadian contingent on a daily basis. However, the period of purposeful observation for this research (primary data collection) was between May and August 2013.
into personal (e.g., diaries, journals) and official (e.g., organizational, policy) and he offers four criteria for assessing the quality of documents used in research: authenticity, credibility, representativeness, and meaning. In this study I reviewed only official or public documents as they are described by Creswell (2009). These included meeting minutes, local newspapers, official letters, and correspondence (Canadian and NATO), and policy documents. All of these documents were authenticated by an external agency such as the NAEW&C Force Commander or the Department of National Defence (DND) of Canada. This made them credible and representative and because of meeting these criteria their meaning was clear and comprehensible.

The document review process took place over three months between May and July 2013. As a NATO member, I had a NATO SECRET security clearance so I had unrestricted access to all the necessary documents. Additionally, as the head of the Requirements Division I had a seat at, and access to, all essential meetings and materials pertaining to the NAEW&C Force including semi-annual Board of Directors meetings, monthly Force Commander boards, and weekly Component Commander meetings (see Appendix B for a depiction of the NAEW Force structure). I also had access to DND publications and correspondence.

My personal connections with some members of the Canadian contingent, garnered through previous associations while I was in the RCAF, also provided opportunities to read and review correspondence from within the contingent including letters and official responses from the senior leadership of the RCAF at the time. Security and privacy protocols prevent me from identifying some of the documents specifically but as stated, they included minutes reflecting decisions and discussions
regarding the Canadian withdrawal from the NAEW&C Force, correspondence to and from the Commander CCNAEWF, and DND policy documents including for example, the Policy on social media use in the Canadian Forces (see Appendix C). All of these documents added to my personal understanding of the situation and enabled me to put a number of responses from the interviews in the proper context and timeline. As such, they contributed to the richness of the data collected and to the depth of the data analysis.

The combination of semi-structured interviews, qualitative observations, and document review provided a more complete picture of the situation, actions and reactions of the Canadian contingent during a time of great change. More importantly, for my study, they offered insights into the perceptions and perspectives of the leaders and followers of the contingents as they related to their experience within the relationships that constituted the Canadian contingent at GK. I will now describe in more detail the steps I took to gather this data, in particular the semi-structured interviews.

**Approach**

As previously described, I adopted a modified grounded theory approach so I could remain open to exploring unanticipated effects and themes as they emerged during the research. Throughout the study, I followed interests, leads, and hunches that emerged or were identified in the data. Then I gathered more data, asked more questions, and reviewed the data periodically, constructing codes and eventually developing categories. The emergent codes and categories helped explain and conceptualize the data, provided a common sense understandings of the data and other theoretical interpretations (adapted from Charmaz, 1990). This entailed conducting the
research while completing initial coding, raising codes to potential categories, continuing the research and focusing the coding, and refining conceptual categories. In so doing, I played an active role in shaping both the process and the product of the research. These steps represent the fundamental strategies of constructivist grounded theory and inherently provide the requisite level of data analysis as I conducted my exploratory study (See Fig 3).

![Grounded Theory Process](from Charmaz, 2006)

As proposed by Charmaz (1990, 2006), by taking this approach to the data collection, transcription, and initial analysis I was able to discover the social processes within the data and inductively construct codes, categories and concepts that informed follow-on interviews. To aid in the construction of codes, categories and concepts, I kept
a reflexive journal to monitor progress and identify the various choices and decisions that I made as a researcher during the course of the research (as per Ortlipp, 2008).

**Interviews**

I conducted 15 in-depth, semi-structured interviews over a period of five months. All of these interviews were done individually with military members of the Canadian contingent at Geilenkirchen and they lasted between 44 and 74 minutes with an average time of 55 minutes. Three of the interviewees were re-contacted at a date subsequent to their initial interview for clarification and supplemental questioning. The interview questions were focused on the communications and relationships between the leadership and the military members of CCNAEWF during the two-year period from May 2011 to May 2013. The final version of the interview instrument, discussed earlier in this chapter, is included at Appendix A for illumination purposes. All interviews were recorded on a digital voice recorder and I took notes during each interview. All interviews were transcribed and the transcriptions used in the data analysis.

Due to scheduling issues, there was an unintended and unanticipated gap of about seven (7) days between the first three (3) Interviews and the subsequent round. This gap provided an opportunity to review and reflect on the information gathered during the first round of interviews. The participants during the initial round of interviews were all classified as “followers” in the context of the Canadian contingent in Geilenkirchen.

Upon reflection and review of the recorded interview and notes, some initial findings were compiled. These results instigated a modification in the interview instrument which was, in effect, the addition of two questions; one focusing on the
maturity and experience of the participants and how that affected their perceptions of the situation and the leadership and the second considering the impact on ‘elements’ on the periphery of the military community (e.g., wives, schools, other military, etc.) were included in the instrument. This modified instrument was used during the next round of interviews.

The second round of interviews consisted of eight (8) interviews. They were conducted over a two-week period and involved six (6) followers and two (2) leaders from the Canadian contingent. All interviews were recorded and notes were taken during and after each interview. The perspectives gained during this round (especially from the leaders) prompted a pause in the research to review and reflect on the instrument once again. During this review, the initial coding was conducted using the audio recordings and the researcher notes. Some of the codes developed during this review raised questions about possible relationships to existing theories. A short literature search focused on the areas in question revealed some potentially significant relations to, or possible extension of existing theories (LMX, Situational, and sensemaking) that warranted further exploration during upcoming interviews. The result of this work was a further modified interview instrument that was used during the ensuing round of interviews. The modifications included questions to leaders and followers (slightly modified for each) regarding their use of social media and the decision-making processes used because of, or in spite of, social media and message control. The role of sensemaking in the context of this situation was elevated in importance as it became clear that considerable confusion existed at various points of the change process under study.
The updated interview instrument was used during the final round of four (4) interviews. In this round, some of the key players (i.e., the leader and his senior team) were interviewed. The modified instrument worked very well for these participants in that the additional lines of inquiry produced significant data that illuminated the rationale behind the decisions and communication strategy. Additionally, the exploration of the maturity and experience of the leaders and followers garnered some very intriguing responses that informed the data analysis.

**Data Analysis Process**

Following the last interview, a summary reflection and review was conducted wherein all the interview recordings were reviewed again and compared to notes in the research journal. From this, a more focused coding was developed and categories were refined.

Each of the interviews was transcribed and the transcriptions were reviewed individually. I then conducted a complete review of all the interviews as a collective whole to refine the coding previously developed and to discover any new codes or categories that were missed during the initial reviews. From the transcripts, after rationalization of the initial 30+ codes by identifying common themes, words, phrasing, and relation to context, eighteen (18) codes emerged. These codes were further analyzed for similarities and significance to the other findings. These codes were raised to six (6) categories for further analysis. These six categories are described in detail in the following sections.

These categories and codes also revealed some areas that required further exploration or clarification to complete the study. This required the reconnections with
four (4) of the participants to clarify and or extend their responses provided during the initial interview. In one case, it also provided the opportunity to ask the participant the questions that were added to the research instrument after his interview. These categories were also used as a basis for further exploration of extant theories of leadership, sensemaking, social networking, attachment, and relationships. A discussion of the analysis and connections to extant theories is provided in the Data Analysis chapter which follows in the next chapter. In the next section, I describe how I approached sampling and selection of participants for this study.

**Sampling and Selection**

In deciding how to approach the population of interest (i.e., the Canadian Contingent at GK), I considered a number of factors related to the size of the group, the places individuals worked on the NATO base, their rank level, their role in the NATO and Canadian communities, and their availability to be interviewed. Reflecting on the purpose of my study which was to gain an understanding of an as-yet unexplored phenomenon through collecting the perspectives and recollections of those directly involved, as per Hennink, Hutter, and Bailey’s (2011) description of qualitative research, I was not so much concerned with getting a large number of participants as getting the ‘right’ participants. Those whose stories and perspectives would add depth to my understanding of how the leader-follower relationship in the Canadian contingent at GK was conducted with social media as an existing factor. This is termed purposive sampling by Bryman and Bell (2011) as participants were chosen “in a strategic way, so that those sampled are relevant to the research questions being posed” (p. 442).
The overall Canadian military population at the NATO Base in GK fluctuated over the years since 1982 with around 110 personnel working at the Base at any one time. With the announcement of the withdrawal from the NATO E3-A programme in June 2011, the contingent began to draw down its complement by not replacing Canadian Forces (CF)\(^{11}\) members as they were posted out of GK. In 2012, when this study began, there were approximately 76 military personnel remaining at GK. While this is a relatively small overall population, the variety of jobs, backgrounds, and ranks offered the opportunity to get diverse perspectives on the situation under study.

The CF members at GK worked in a wide variety of positions including operational (pilots, navigators, air combat control officers and operators, etc.) and support (technicians, security, administration, training, etc.). This meant that they were dispersed across the base and that they worked at different times and on different days since the operations at the Base could often be 24/7. It was important for me to get participants from each of these areas so I could assess if the relationships were similar across the contingent or differed because of their location/work hours, etc. I also needed to understand if the withdrawal had similar impacts on the different areas of employment for the contingent members. The participants I did interview were representative of a wide cross-section of the contingent population at GK.

Similarly, the rank levels of the contingent members provided a broad spectrum from which to draw perspectives. They ranged from Colonel to Master Corporal, a range of eleven levels\(^{12}\) that includes senior and junior officers, senior non-commissioned

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\(^{11}\) Here I use CF instead of RCAF as some members of the contingent were from other branches in the Canadian Forces such as the Navy or Army.

\(^{12}\) Of these eleven different ranks in the range, only nine (9) were present at GK due to the aforementioned developmental levels of the members of the contingent.
officers, and junior non-commissioned ranks. This is important for this study as each rank level had its own issues and concerns and was involved with the contingent and the Base in different ways. These experiences and perceptions shape the lens through which these individuals construct their reality and offer valuable perspectives on the relationships and effects of social media at GK. As such, I was very interested in interviewing at least one from each rank level. Fortunately, I was able to interview representatives from eight of the nine rank levels present at GK during this study.

CF members at GK assumed various roles on the NATO Base and within the Contingent. These roles were not always associated with rank (for example, the head of a committee could be someone from the junior ranks with senior officers working for them). Like rank, these roles affect the networks, experiences, and relationships within and outside of the Canadian contingent. Therefore, it was important for this study that I was able to reach those members of the contingent that held key roles on the Base or within the contingent. Again, I was relatively successful in achieving this objective with eight (8) of those interviewed holding (or had recently held) a key role on the Base or in the Contingent.

Overarching all of these criteria, however, was the contingent member’s availability and interest in participating in the study. Having identified what Morse (1994) describes as “a good informant” by using the sampling criteria just described, I was then reliant on their availability and goodwill to participate and provide their perspectives.

For this study, I also employed a secondary selection method of advertising and soliciting participants via email and word of mouth using local electronic and social
networks. This is described as secondary selection by Morse (1994, in Denzin & Lincoln, 1994).

In keeping with my modified grounded theory approach, my approach to identifying and selecting participants was in line with sampling as advocated by Glaser and Strauss (1967) which “is built upon two key concepts: “constant comparison,” in which data are collected and analyzed simultaneously, and “theoretical sampling,” in which decisions about which data should be collected next are determined by the theory that is being constructed” (Suddaby, 2006, p. 634). The aim of theoretical sampling is to develop concepts, discover avenues of inquiry, and make relevant connections within the data through the optimization of data collection opportunities (Corbin & Strauss, 2008). They go on to state that “[t]heoretical sampling is especially important when studying new or unchartered areas because it allows for discovery” (p. 144). This is very apropos to this study as I am studying an area that is heretofore unexplored and I am seeking to understand how the leader-follower relationship is developed and maintained in a context that includes social media.

Theoretical sampling techniques in grounded theory research are cumulative in that as each piece of data is collected it is analyzed and that analysis informs follow-on data collection and analysis in an iterative cycle that continues until the point of data saturation is reached (Hesse-Biber & Leavy, 2006). In order to make theoretical sampling successful, effective recruitment of participants is critical. My purposive sampling recruitment techniques generated the ‘right’ candidates for the interviews in terms of the aforementioned criteria and enabled the effective application of theoretical sampling during the interview stage of this study.
I ended up with 15 interview participants who fit all or most of my sampling criteria and I used the data collected to inform the follow-on collection and analysis (further description of this process is included in the Data Analysis chapter). As previously stated, I also had an indeterminate number of what I term as ‘conversational interviews’ with individuals who were either not available or unwilling to conduct a more formal interview. These conversations were reflected in my field notes and are included in the Data Analysis chapter that follows.

I considered the data collected sufficient as no new concepts or ideas were emerging from the data and the information gathered became repetitive. This is known as the saturation point for data collection (Bryman & Bell, 2007; Corbin & Strauss, 1998; Hennink, Hutter, & Bailey, 2011). As this was a relatively homogenous and contained group, I felt that the saturation point had been reached with the participants that I had interviewed. Further discussion of data saturation is provided in the Data Analysis chapter.

**Description of Participants**

In order to appreciate and situate the perspective and responses highlighted in the Data Analysis chapter which follows, I provide here a general description of the participants. Due to confidentiality requirements, these descriptions will be broad enough to offer some insight into the position and background of the individual but will not divulge sufficient amounts of information to enable specific identification of a particular participant. Pseudonyms will be associated with each description and these pseudonyms will be used during the data analysis to help locate the response within the
context of the phenomenon and the study. A more detailed description of the participants is at Appendix D.

As stated, the participant pool was representative of the contingent in that it provided perspectives from the leadership and the followers at all levels and ranks within the organization. It also provided a breadth of perspective from across the NATO base at GK. That said, there was an element of homogeneity to the group. All participants were white, mature, male\textsuperscript{13}, Canadian citizens, with over ten years in the CF. The homogeneity of backgrounds of the participants inherently means a commonality of experiences and the development of a collective perspective or lens through which they view the world and construct their realities. Understanding this is important for data analysis and for appreciating the values and cultural aspects of the contingent. Fortunately, my personal background was very similar, and I had a deep understanding of how they viewed the world. This provided me, as an interviewer, with the familiarity and connection that enabled deeper understanding of the stories and insight into the meaning behind their words. It offered a level of comfort for the participants that allowed them to speak candidly and ‘in their own language’ because there was no need for them to explain context, background, operations, and they could use the acronyms so widely employed in the CF and NATO.

Five (5) of those interviewed were considered leaders for the purposes of this study and the remainder were classified in the follower category, although each interviewee had elements of leadership and followership within their assigned duties. There were five (5) Non-commissioned officers (NCOs), six (6) junior officers and four

\textsuperscript{13} The absence of female participants was a concern and I addressed this missing perspective through conversational interviews done \textit{ad hoc} during the study. Overall, in the Canadian contingent at the time of this study, females constituted approximately 5\% of the total population.
(4) senior officers interviewed. I am using these terms very loosely here to delineate the ranks and associating them with the position each held within the contingent. In regular parlance, the terms NCO and senior officer would be used to designate some of the individuals differently. I interviewed three people each from the Support, Training, Technical, Operations and Administration wings of the NATO base. Again, these terms are used loosely as some individuals’ duties blurred the lines between wings. All but two of the individuals were married and had their families with them at GK. Further description and details about the interviewees are included at Appendix D and expanded upon in the Data Analysis chapter.

This description of sampling, data collection and the participants provides insight into how the research was conducted in situ. I will now provide some further insights into the ethical considerations and other challenges I faced in undertaking this study.

**Ethical Considerations and Challenges**

This study dealt with the perceptions and opinions of individuals regarding a particular set of relationships within their work environment. As such, it had the potential to cause some harm if negative or derogatory comments were made available to others within the organization. Consequently, I followed a rigorous ethics protocol to ensure confidentiality and anonymity were assured for the participants.

The Research Ethics Board (REB) at the University of Guelph where I am taking my PhD, has a very meticulous procedure that must be followed prior to commencing any research involving humans. This procedure focuses primarily on three aspects of ethics in research: confidentiality, anonymity and informed consent. Through this focus they seek to ensure that any potential harm to participants can be identified and
mitigated before and during the conduct of the research. I adhered to and met the requirements of the REB procedures throughout this study and received their approval to proceed before conducting my interviews.

Additionally, in order to conduct social science research with DND personnel, I was required to acquire approval from the Social Science Research Review Board (SSRRB). The ethics requirements are essentially the same as the University of Guelph REB in that the researcher is responsible to design and conduct a study that will do no (or minimal harm) and follows established ethics protocols in accordance with the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans. The Defence Administrative Orders (DAOD) that apply include DAOD 5061-0 Research Involving Human Subject, DAOD 5061-1 Approval Procedures, DAOD 5062-0 Social Science Research and DAOD 5062-1, Conduct of Social Science Research. DAOD 5062-1 (2014) which refers to the requirements and protocols of acquiring SSRRB approval states that “[t]he SSRRB reviews a proposal on the basis of its technical merits, including ethics, design and methodology, relevance and timing” (p. 1). An added element to the SSRRB requirements is that the research must not compromise operational security. The full policy statement from DAOD 5062-0 is included at Appendix E.

A specific requirement to conduct research within the CF is to secure a Level One (L1) Advisor. In this case, L1 refers to a General Officer holding a designated leadership position within the CF “including VCDS, Environmental Chiefs, Chief Military Personnel (CMP) and Departmental Assistant Deputy Ministers (ADM) ...” (CFJP 1.0, 2008, p. 21). Among the responsibilities of the L1 Advisor are two key elements:
“ensuring the project is of interest and value to their organization”, and “granting approval in principal for access to research participants” (DAOD 5062-1, 2014, p. 7). In my case, I was fortunate to get the Director of Air Personnel Strategy to agree to act as my L1 Advisor. This enabled the approval of my application for conducting research on human subjects within the CF.

This study was designed to present minimal risk to all parties involved. While there is always a risk when conducting research involving humans, in this case, the risk of harm was considered negligible. The interview questions were designed to avoid entering into personal or sensitive areas of a person’s perspective. If this had occurred, I was prepared to immediately cease the interview and minimize any harm; fortunately there was no need to do so during the study.

All participation was completely voluntary and no retribution or consequences were intended or will result as an outcome of participation or non-participation. Each and every participant was provided with a written statement of voluntary informed consent. As Thorne (2004) states regarding informed consent, the basic elements include:

- fair explanation of the purpose of the research and the procedures to be followed; a description of the risks and benefits which might reasonably be expected; an offer to answer any inquiries concerning the procedures; and instruction that the person is free to withdraw consent and discontinue participation in the project at any time (p. 160).

Participants were required to read, indicate that they understood and then sign the consent form (for a copy of the Informed Consent form, see Appendix F). Each
participant was given the opportunity to ask any questions they wished prior to signing the form and they were able to withdraw at any time without repercussions. I verbally reminded each of the participants of this in the preamble to each interview. Due to the nature of the participants (i.e., educated, English-speaking, employed) there was no instance of misinterpretation of the form or misunderstanding of the concept of voluntary participation and informed consent.

Every possible effort was made to ensure confidentiality of the information and anonymity of participants. All interviews were conducted in a separate location from the workplace thus minimizing any possible stigma attached with participation. All interviews were recorded with a digital recorder that was password protected and maintained under strict security when not in use (i.e., personal possession or in a safe). The identities of participants were and are being kept confidential through the use of code words and pseudonyms. No information is directly connected with any informant at any time. Information gathered in the interviews has not been nor will it be shared or disseminated without the prior consent of the participants and even then, it will be general in nature and non-attributable to a specific individual. Prior to publishing the findings, all participants will have the opportunity to review the draft report and elect to have their contribution modified or removed if they so wish. However, through the use of coding and other measures, it should be nearly impossible to determine the source of any of the reported comments.

In summary, all information and participation has been and will be handled with utmost respect and protected to the best of my professional ability. Given my experience handling classified information at the highest level for the past thirty years, I
am confident that I can maintain confidentiality of the information gathered during this study.

**Other Challenges**

This study presented a number of challenges, including the ones previously described. Directly connected with the ethics approval process, was the primary challenge of time. Time to receive approval, time to reach the intended candidates, time to conduct the interviews – it all added up to become a major concern for the ultimate success of the study. Thankfully, I was able to overcome these obstacles and in doing so, learned a few lessons.

When I was considering how and where to conduct my study into social media and leadership in the 21st century organization, I was seeking a situation or organization in which the affects of social media would be discernible on the leadership relationships. This required a combination of elements that were difficult to find and recognize from outside of an organization. There would have to be a challenging or changing circumstance where the need for leadership was evident and there would have to be known use of social media by the members of the organization. When I arrived in GK in August 2012, I was still looking at a number of situations in Canada and monitoring them as potential candidates for my research. Thus, it took me a few months of being at GK before I realized the ‘perfect storm’ was literally at my fingertips. This was late November 2012.

The challenge then became to get approval to conduct the study from three different agencies – my PhD committee, the University of Guelph REB, and the SSRRB
for the CF. It was not getting the approvals that was the challenge; the challenge lay in
the timeliness of those approvals. Since the initial announcement of the Canadian
withdrawal from the NATO AEW&C Force occurred in May 2011, a lot of time had
passed, decisions had been made and actions were already underway which were
impacting my ability to do effective research. The chief activity was the phased
withdrawal of Canadian personnel from GK, which had begun in the summer of 2012.
Already about one-third of the Canadian contingent had left GK to go back to Canada or
to other postings around the world. And another 40% were due to leave in the summer
of 2013.

The opportunity to conduct timely and concerted research in the context where
the phenomenon had occurred was rapidly diminishing. I knew if I did not receive the
necessary approvals before the summer of 2013, a prime research opportunity would
be lost. This did not mean that it would gone forever, it just meant that gathering the
data would be significantly more difficult, costly and time-consuming. It also meant that
conducting face-to-face interviews with prime candidates would be jeopardized due to
location, time elapsing, and connection. I had to act fast but unfortunately, the urgency
was not at the same level for the other three agencies involved in the equation.

I sought approval first from my committee and sufficiently convinced my advisor
that I needed to begin the ethics review and approval process before final approval of
my proposal was received from my committee. This was unusual but since my proposal
was written and the delay was being caused by scheduling and coordinating calendars
of the multiple players on the committee, she indicated that I could begin the ethics
processes before completing my oral defence of my proposal.
As previously described, I had to conduct and receive approval from two different ethics review boards – and the SSRRB would not proceed without prior approval from the University of Guelph REB. Thus, I had to start the Guelph REB process post-haste. Concurrently, I began soliciting for an L1 Advisor from within the CF. Fortunately, my previous connections from my 30-year career in the CF paid dividends, and I was able to secure a sponsor and expedite the SSRRB approval process. Once Guelph REB approval was granted, I sent the paperwork to SSRRB just in time for the final Board before their summer break (otherwise, my approval would have waited until September). Again, my connections and knowledge of the CF system enabled me to ensure my application was reviewed before the summer.

The approvals were all obtained in time for me to conduct my study at GK before the second tranche of the Canadian contingent departed. A few of the key players that I wanted to speak with left before the approvals were granted, however in anticipation of the approvals, I spoke to these individuals and arranged to meet with them after their return to Canada. By exchanging contact information, we facilitated our eventual meeting and interviews and I was able to gather the final pieces of the puzzle and complete my study.

For me, the lessons learned were to be proactive with all parties involved in achieving my goals, understanding that not everyone shares my personal urgency but will understand if given sufficient information and planning ahead with contingency planning enabled the achievement of goals despite missing a deadline. By speaking with my committee in advance and apprising them of the situation, I was able to gain the support of my advisor and proceed to REB in advance of completing my proposal. This
saved me valuable time in the process and enabled completion before the summer. Through explaining to them the situation in GK and impressing upon them the need to complete not one but two Ethics reviews, the committee understood the time crunch and the potential negative impacts on my proposed study. Their support was crucial in the ultimate success of this study.

Similarly, my previous experience and connections within the CF system – both as a researcher and as a member of the Air Force paid dividends in making the approval process moved uncharacteristically quickly. The cooperation I received from a number of agencies and people within the system reminded me of the value of social networks and of adopting a collaborative attitude. Both elements are valuable in conducting research and succeeding in life. In this case, they came together to provide timely support for my study and enabled me to achieve my research goals in GK.

My social network proved invaluable in getting agreement from the two key players who left GK before I received the approvals to proceed with my study. Again, connections, a collaborative attitude and previous goodwill all contributed to gaining the support and cooperation of these individuals. When we did eventually meet to conduct the interviews, both parties were extremely helpful and had actually done some processing in advance to ensure their memories of events and actions were as accurate as possible. As stated, their contributions to study were invaluable because of the roles they played in GK and because of their candid responses to my questions.

For future research, I will remain cognizant of the time required to achieve necessary approvals and factor that into my personal and research timelines. Explaining
and sharing circumstantial and contextual information helps others understand your personal needs and urgency. We cannot expect others to see the world through our eyes; they are busy constructing their own realities. Consequently, the value of cooperation, collaboration and communication is not restricted to organizational pursuits alone – researchers must keep these valuable social skills at hand in order to succeed in studying human being in real-life situations.

The other significant challenge I faced as researcher during this study was dealing with my personal preconceptions and assumptions about the CF, RCAF, NATO and about social media, its use and power. This was an on-going challenge that extended from the initial stages of the study right through to the data analysis and even in the writing of this report.

As previously described, I was a member of the CF/RCAF for 30 years. This close relationship to the organization caused the formation of some perspectives and assumptions about the institution that I had not confirmed or challenged for many years. One regarded the close management of information. The very nature of information in an organization that deals with national and international security means that tight control is required to maintain the integrity and security of the information. Although this tight control was not required for all information, the practices and procedures for classified information were so entrenched in the day-to-day operations that virtually all information ended up being handled in the same manner. I had assumed that this was still the case and did not seek to confirm or refute this assumption, even though I had retired from the RCAF five (5) years earlier. This despite my exposure to fundamental changes within the organization before I had retired. My assumption was that the
changes would not be sustained in the culture that I perceived in the RCAF. I was incorrect in this assumption and it impacted how I approached this study.

The changes which were underway prior to my retirement have taken hold in the RCAF and the management and sharing of information has become much more inclusive and open. The treatment and handling of classified information remains as strict and tight as ever, but the transmission and sharing of unclassified information is much more relaxed. Leaders readily share information with their subordinates in order to increase engagement and because they understand that they can no longer control this type of information as they once did. My perceptions of the reasons for this change are described in more detail in the data analysis section. For this discussion, it is sufficient to understand that I had to overcome my preconceived notions about information handling in the RCAF in order to understand the situation under study more fully. This was a pleasant learning opportunity for me.

Throughout the study, I had to constantly remind myself to look at the data and hear the participants with an unbiased and open mind. My preconceptions about the military, like my assumptions regarding information handling, may no longer be valid. And regardless of their validity, they had to be put aside so I could accept, process and report the data in manner that is as unbiased as possible – understanding the impossibility of doing so. This was a constant and on-going challenge that I relished while struggling to achieve.

In a similar manner, I had to overcome my preconceived ideas about the use of social media by the members of the CCNAEWF at GK and CF members in general.
Social media was a new concept in my final years in the CF. It had not been embraced by the military establishment and it was viewed as another form of media of which to wary. In general, the military (and the CF in particular) did not view the media (in any form) as a friendly advocate. The media was more often seen as another tool in the military arsenal to be used to manipulate or extend psychological advantage over an adversary. This generated a perspective that this could be reciprocated disadvantageously at any time. Hence, when social media emerged the negative aspects of its use were the primary focus in the CF. Remember that I am speaking from my personal perspective and recollections, shaped through a lens primarily shaped before the advent of social media. Consequently, when I approached this study, my assumption was that this was still the prevailing attitude toward social media in the CF.

As I was shaping my proposal and connecting with the members of CCNAEWF on a personal level, I discovered that the use of social media was widespread throughout the Canadian community. I did not join their networks, which was a mistake. Had I done so, I would have understood how, when and why they used social media. My assumption was that it was primary means of communicating information within the community. As described in the data analysis section in more detail, this assumption was incorrect. It was a means of communication but only for select information that was unrelated to the withdrawal. It took me a while to grasp the subtle difference and the immense importance of this to my study.

**Chapter Synopsis**

In this chapter I have provided a description of the methodologies I adopted to answer my research questions as presented at the start of the chapter. This, in
essence, explains how I chose to address the research questions that emerged from the literature review completed in Chapter 2. I have detailed the theoretical underpinnings including my interpretivist epistemology perspective and my constructivist ontological approach that informed my research strategy for this study. Further, I used these foundational elements to build a case for my choice of a modified grounded theory approach to conducting this exploratory study. Due to the literature gap, there was little theory available to inform this study and combining this with my social constructivist approach to leadership, a modified constructivist grounded theory approach was chosen as a framework upon which to base my exploration of the phenomenon under study. This method fit very well with my personal and professional perspectives on leadership and qualitative research.

The modified grounded theory approach was conducted using three interconnected methods of research: semi-structured interviews, qualitative observation and a review of official documents. These, combined with my personal background, created an opportunity to understand the how and why of the situation and gather the depth and richness of the participants’ perspectives. This data is vital to addressing the research questions effectively.

I then described in more detail how the study was conducted, highlighting the sampling techniques and offering a description of the participants to help develop a deeper understanding of the context. I also discussed how my personal involvement and mental models impacted the research while it was being conducted and how it affects the data analysis which follows in Chapter 4. I concluded this chapter with a discussion of the ethics review process and the major challenges that I had to overcome.
to conduct the study in a timely and effective manner. This leads to a discussion of how the data that was gathered was analyzed and applied to addressing the research question “How is leadership conducted in a social media context?” That is provided in the next Chapter – Data Analysis.
CHAPTER 4 - DATA ANALYSIS

If the distinguishing feature of quantitative evidence is the manipulation of numerical data then qualitative analysis is characterised by the development and manipulation of concepts. (Fitzpatrick & Boulton, 1994, p. 110)

Introduction

In this chapter I offer a description of my analysis of the data gathered during my study. I say “my analysis” because it is precisely that – an analysis of the data through my lens using my mental models and perspectives. I begin by describing how I approached the analysis. This is done primarily because a common criticism of qualitative research papers is the lack of rigour and detailed description of the process used to reach the conclusions (cf. Denzin & Lincoln, 1994). By providing a description of my process, I aim to avoid such critiques of this study. Following the account of the analysis process, I provide an explanation of the themes, codes and categories that emerged from the data and use those as the central points for relating the findings I derived and then connect those to the extant literature reviewed earlier in this dissertation.

The Analysis Process

In this section I describe the process I used to analyze the data gathered during the study. The type of qualitative data gathered during the interviews and observations influenced the data analysis, requiring the identification of categories and codes. “Qualitative codes take segments of data apart, name them in concise terms, and propose an analytic handle to develop abstract ideas for interpreting each segment of
These codes and categories provided an analytical theoretical understanding of what was occurring with regards to the perceptions of the actors and how they viewed social media, leadership and relationships within their organization. The codes and categories or themes were used to develop conclusions regarding how the leader-follower relationship was enacted in the environment (which included social media) under study.

Throughout the data gathering process, I was reviewing, collating, correlating and coding information. To be clear on what this means, I provide here a description of the coding process I used. This will be followed by an account of how the coding evolved during the data gathering and analysis processes.

As soon as I began collecting data, I was reviewing and considering it in context. By context I mean two things: first, the context or environment in which the study was taking place, and second, in context of the other data I was continuing to gather. Each context had an impact on how and what data I collected. For example, as I began observing the actions and reactions of the leadership and constituents of CCNAEWF it coloured how I interpreted the data I collected and then, after the initial (and each periodic) review of the data, my perceptions and my data requirements were impacted by how each review changed the perceptual context in which I was now conducting the study.

The primary data was collected during the interviews as described in the Methodology chapter. The analysis of the data collected in this phase of the research was done in multiple steps. The first step was to listen to each recorded interview within a day or two of it being conducted. From this initial review, I gathered highlights that
were relevant to the research questions and noted those responses that were unexpected or that opened up new areas of potential investigation.

As previously noted, there were two unplanned gaps in conducting the interviews. During these gaps, all the interviews conducted up to that point were replayed and the notes from each compared. This resulted in the generation of my initial codes and corroboration with memos from my field notes. Each iteration of this process resulted in a refinement of the codes and raising of some codes to the categories as described below. These reviews also resulted in the modification of the interview instrument as discussed in the methods section. Each round of interviews enabled a more focused coding of information as the interview instrument was refined.

When the initial round of interviews was completed, I began a more structured and purposeful process of developing my initial codes. As Bryman and Bell (2011) state, “[c]oding is the starting point for most forms of qualitative data analysis …” (p. 584). This was done by identifying natural groupings within the data collected to that point. Reviewing the data, grouping it to identify common words and themes, and comparing consistent ideas with the memos I had written in my field notes enabled me to select, separate and sort the data so I could begin a preliminary analysis and identify any emergent categories (as per Locke, 2001).

The transcriptions of the interviews were each reviewed individually and noteworthy phrases or responses were highlighted for their significance and relevance to the codes that emerged during the aural review of the interviews. After a complete review of every transcript, I then listened to the recording of each interview while reading its associated transcript. This was done to listen for and note any nuances or
emphasis in the speech patterns of the respondents that could signal significant importance or reluctance to respond to any of the questions and/or identify particular areas of common methods of response (e.g., pausing, emphasizing, etc.). After this process I ended up with 32 codes which were rationalized and amalgamated to around 18 codes of interest including positioning, family, financial, rumours, transitioning, leading, information management, maturity, experience, culture, belonging, trust, relationships, denial, using social media, and networking.

Throughout this process, I was cognizant of the importance of remaining true to the data I had collected and not impose any theories on it. I wanted to understand the perceptions of the participants and how they recalled the situation and their reactions to the events. As Kathy Charmaz says “What people tell, when they tell it, and how they tell it all matter” (2006, p. 45). Thus, I wanted to remain open to all theoretical and analytical possibilities.

I continued to refine and review my codes while ‘living’ with the data. This focused coding was a more selective process in which I used the most frequent and significant initial codes to sort, synthesize, integrate and organize data into natural groupings or conceptual categories (Charmaz, 2006; Locke, 2001).

As my initial codes matured through constant review and revision, I began to develop conceptual categories into which the codes naturally fit. I then used these categories to compare and categorize other data that was collected. This helped to clarify what I perceived in my data as I compared for the categories with the new data looking for similarities and for differences (as per Locke, 2001). For example, I noticed a connection between discussions of trust, leadership, and relationships within the
community. Theses eventually became part of my final code “the leader-follower relationship.” Similarly, each participant felt the need to tell the story of the withdrawal from their perspective despite the fact that they knew I was already aware of the situation. While this provided a richer contextual understanding, the data I initially coded as interesting merged into a description of the circumstance and contributed little else to the findings as they related to the research questions.

From these reviews, the refined codes and categories were developed and compared to the field notes to ensure that all codes identified in each data pack were considered and collated as appropriate. The refined codes and categories that emerged from the data were principally centred on six themes as shown in Table 3. These themes are discussed in detail in a subsequent section – Categorized Findings.

In their 1967 treatise, Glaser and Strauss discuss the two types of categories that are created from the data: in vivo categories that “arise from the languages, meanings and perspectives through which we learn about the empirical world, including those of our participants as well as our own” (Locke, 2001, p. 47) and theoretical categories which “reflect the particular disciplinary and theoretical sensibilities of researchers” (Locke, 2001, p. 65). Hennink, Hutter, and Bailey (2011) refer to the two types of information as inductive codes and deductive codes, respectively. The six categories I developed were a combination of these two types of data. For example, the Leader-Follower Relationship is an in vivo code comprised exclusively of perspectives and meanings derived from the participants regarding their relationships within the CCNAEF community. Conversely, the Maturity and Experience Levels is a theoretical category.
generated as a direct reflection of my theoretical understanding and interpretation of the data I collected during the study.

<table>
<thead>
<tr>
<th>Codes /Categories</th>
<th>Description</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using social media</td>
<td>How, when and how often social media was used by the contingent members. What constituted social media for them.</td>
<td>Includes their perceptions of social media and its use.</td>
</tr>
<tr>
<td>Information Flow</td>
<td>Describes how information moved between constituents within CCNAEWF.</td>
<td>Includes descriptions of before, during and after the withdrawal announcement.</td>
</tr>
<tr>
<td>Leadership decisions/action</td>
<td>What leadership actions were taken and why and the impact they had on the followers and the reactions /consequences for the contingent and the leader-follower relationship.</td>
<td>Includes descriptions of the rationale for the decisions, how and the perceptions of the followers regarding these leadership decisions/actions.</td>
</tr>
<tr>
<td>Managing the Message</td>
<td>Regards the use of framing, communication timing, descriptions, decisions and language used by leadership.</td>
<td>The reasoning of the leadership, the reactions of the followers and the consequences for the contingent regarding the withdrawal.</td>
</tr>
<tr>
<td>Maturity and Experience Levels</td>
<td>Maturity, experience, expertise and motivation levels of the followers and the leaders within CCNAEWF.</td>
<td>Discussed for two reasons – to explain the reaction to the withdrawal and the leadership; and to contextualize the perceptions and use of social media.</td>
</tr>
<tr>
<td>The Leader-Follower Relationship</td>
<td>Primarily focused on the elements of trust and reciprocity within the relationship and how the withdrawal impacted them.</td>
<td>Garnered from the perceptions of the actors within the relationship.</td>
</tr>
</tbody>
</table>
For me, this development of codes and categories was a very interactive process involving constant revisiting and immersion in the data while interviewing, interacting and observing the participants. In this way, I was able to develop a deeper understanding of the data and the perspectives from which the participants viewed their respective realities. It also prompted me to begin considering the theoretical characteristics and underpinnings that were emerging from the analysis.

As I completed the reviews and development of the categories from the data, I transitioned them from conceptual into the six substantive categories detailed in Table 3. This is the second stage of Glaser and Strauss’ (1967) four-stage process in the development of a grounded theory. At this point, if I were to follow their prescribed process, I would move on to develop theoretical categories or directions. However, I am not at the point of generating a theoretical direction, as this work requires further development and sampling across different settings before a formal theory can be developed or proposed (as per Locke 2001).

As with most qualitative studies, I ended up with more data than I had originally envisioned and more data than I needed to fully address my research questions. The sheer volume of data was overwhelming at first but the use of rudimentary codes and regular periodic reviews of the data enabled me to categorize and align data into manageable ‘chunks.’ Glesne (1999) recommends writing monthly reports to “examine systematically where you are and where you should consider going” (p. 133). Following this recommendation (although my ‘reports’ were just bullet-point summarizations) helped me to arrange my thoughts and adjust my research focus via modifications to the interview instrument as described previously in the methodology section.
Sufficient Data

The data generated some intriguing results; some that supported the initial assumptions and some that did not. Overall, a total of 15 participants were interviewed from a potential pool of 75 people (~20% of the population). I considered the number of interviews sufficient for three primary reasons.

First, the population under study was, as previously described, relatively homogeneous comprising almost exclusively white, male, military members with many common experiences. Population homogeneity intuitively reduces the breadth and variety of perspectives that can be expected from a population of this nature. This reduces the requirement for a larger sample (cf. Bryman & Bell, 2011).

Second, the 15 participants came from a representative cross-section of the population. The participant pool was comprised of five representatives from what was considered the “follower” segment, five were from the middle segment of the population (sometimes leaders, sometimes followers), and five were leaders. It is challenging (and in some cases, unfair) to rank the respondents in such terms as they often filled the other roles, and this is presented here only to provide a deeper understanding of the source of the data that follows. In order to help position the participants relatively, an organization chart of CCNAEWF is included at Appendix B. Additional information regarding each participant is provided in Appendix D to help the reader understand the perspective from which their responses were generated.

The third, and most important reason that no further data was collected is because the information received from the participants became repetitive; indicating the saturation point of the research had been reached. In this instance, saturation “means
that sufficient data to account for all aspects of the phenomenon have been obtained” (Morse, et al., 2002, p. 18) and the collection of more data was unlikely to provide any new insight (Creswell, 2009; Mason, 2010). As Corbin and Strauss (1998) offer that a researcher could collect data infinitely but at some point has to acknowledge that the concepts under study have been sufficiently well researched and accept that every study has its limitations. The combination of no new data and my personal perception that the concepts were sufficiently developed led me to conclude that I had reached the theoretical saturation level for this particular study. The implications of this will be discussed under limitations and further research opportunities later in this dissertation.

**An Iterative Interdependent Process**

I conducted the analysis in multiple overlapping stages. As there were three different methods of data collection, the analysis of the data collected in each method influenced the collection of data in the other two. For instance, prior to and while the interviews were being conducted, I was observing the consequences of the CCNAEWF leadership actions and decisions. I reviewed these field notes weekly and this influenced the development and subsequent modification of the interview instrument. Similarly, my review and analysis of relevant documents regarding the withdrawal and CF policies resulted in changes to the interview questions and impacted how I viewed the activities, reactions, and responses of the members of the Canadian contingent.

The field notes from the observations were reviewed periodically (at minimum once per month, often more frequently) to identify any patterns of response by either the leadership or the members of CCNAEWF. Each action or decision by the Commander or leadership team was reviewed specifically in terms of the timing, method of
transmission to the members, and the members immediate, and then longer-term reactions were noted. The decisions or actions were categorized in terms of their impact on the members of the contingent (i.e., did it alter the understanding and knowledge of the circumstances in a significant manner) and their relative importance to the withdrawal plan and/or sequence. The reactions of the contingent members to the announcement of these decisions or actions were correlated to develop a summary view of the followers’ response to the leadership.

My observation notes were compiled from passively observing in my normal capacity as a civilian officer on the Headquarter staff. I was doing so without causing any harm or intervention. No one was aware that I was keeping notes of what I observed during this period. The observations occurred in formal and informal settings. As previously described in the Methodology Chapter, in my capacity as a senior civilian officer I was a participant in and had access to all levels of meetings within the NATO AEW Force. As a Canadian, I also had open access to many (but not all) Canadian social and formal events. As a researcher, this unique situation offered multiple and varied opportunities to observe the actions and reactions of the leadership and members of the Canadian contingent and their NATO partners at GK.

Concurrent to the field observations, I conducted a review of some relevant documents associated with the withdrawal. These included the Canadian Forces social media policy and the related Queens’ Regulations and Orders (QR&O). I also reviewed a copy of the different official announcements regarding decisions by the Canadian government pertaining to the withdrawal of Canadian support to the NATO AEW&C Force. Minutes from various meetings at the Component and Force level (e.g., Board of
Directors, Force Review Boards, etc.) were also reviewed to gather supporting contextual information relevant to the withdrawal and the reactions by Canada and the other nations in the Force. These documents supplemented my knowledge of the withdrawal and clarified to some extent, the rationale behind the Canadian government decision and the timings of the various official announcements. This provided valuable context and deeper understanding of the situation and aided in the development of the codes and categories that emerged from the other data collected.

The Data collection and Data Analysis processes occurred concurrently as can be derived from this description. This is common in qualitative and grounded theory research (Charmaz, 2006). It is often challenging to describe where one started and the other stopped. The iterative, immersive process provided a research perspective that I had not anticipated at the outset. I felt much more connected to the members of the contingent, despite the fact that the withdrawal did not affect me in any personal or professional way. I will now describe what I found from the rich data I collected and analyzed during this process.

**General Findings**

**Sequence of Events**

From the data collected, the sequence of events became clear, as did the people’s perceptions of those events and their perception of the leadership and how they handled the situation. The sequence of events (see Appendix G) provides a contextual framework for understanding how people heard about and reacted to the information pertinent to the withdrawal.
**Reaction to the Withdrawal**

Before discussing specific findings and relating them to the research questions, it is important to understand the context within which the responses from the participants were provided. The decision to withdraw from the NAEW&CF was a significant event from a number of perspectives for the Canadian personnel and their families. In general terms, a change of this magnitude – and the end of an era for the Canadian Forces at Geilenkirchen – impacted them financially, personally, professionally and emotionally. Some of the recollections and stories related during the interviews provided interesting insight into the emotional depth that this change reached for the participants. Some of the reactions were akin to Dr. Kubler-Ross’s (1969) five stages of dying including denial, anger, bargaining, depression and eventually, acceptance.

When most of the respondents first heard of the decision to withdraw, their initial reaction was disbelief. Sometimes this was in spite of their experience and/or background, and some had even done previous work on analysis of options to withdraw from the program. Even when presented with a letter signed by the Prime Minister of Canada, they continued to act on the premise that a mistake had been made. Regarding the first reaction to hearing of the withdrawal, one participant I will call “Ivan” was a senior NCO in the Tech element said:

> The first thing was disbelief. I hadn’t heard anything like this. You figure that the boss would have known first before anybody there, but that turned out to be wrong. Politics are what they are. Yeah, at first it was disbelief, and then it was confusion. It was like ‘Oh, that’s not a good sign.’ A little bit of confusion, I don’t know if confusion is the right word,
but we all, because nobody wanted to believe it I guess, we all thought ‘Oh no, they’re just referring to [another NATO unit].’
Concurrent with the disbelief were feelings of betrayal, disappointment, and anger. When finally, it was confirmed that Canada was indeed withdrawing from the NAEW&CF program, the leadership and the members began bargaining – bargaining for a phased withdrawal, bargaining to stay longer, bargaining to continue flying, etc. As George stated:

There was a lot of to-ing and fro-ing and it was a long negotiation with regards to ... right down to the specifics of which positions, when ... the buildings, liability, and the concerns amongst the Board of Directors as to how the withdrawal would take place ...

At this point, the bargaining was focused on minimizing the impact on the personnel and the operations. There was no evidence gathered to support any indications of depression but the acceptance stage was clearly evident once that had been reached in late 2012. This is relevant for this study as it provides context within which the leader-follower relationship was set. It also helps explain why the leadership took the steps they did, when they did.

**Scope of the Change**

Similarly, it is important to note that, as a number of participants remarked “everyone was in the same boat” or “we were all in it together” and other similar sentiment as Moe, an officer on the Support side of the contingent summarized:

I think that people here, although frustrated with the situation, were comforted that they knew as much as anybody else here did. You can

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14 The other NATO unit is not named here due to classification of the information.
moan and complain about it but if your commander is in the same boat, you can only complain so much if he’s in the exact same situations as you are, then you reflect it past him ...

That is to say, this was not a downsizing or restructuring effort that affected some but not all. Every Canadian military person, regardless of rank or position was leaving the E-3A component. So, the leaders were not trying to ‘sell’ something or convince only a portion of the organization to change. They were all being affected equally. This became a form of social identification which strengthened the individuals' connection with the group and caused them to see their individual actions as a reflection of the group (cf. Mael & Ashforth, 1992; Pratt, 1998). This, as it turns out, was a contributing factor to the acceptance of the decision and a positive contributor to the strength of the leader-follower relationship in this situation.

**Categorized Findings**

Given this context, I will now examine the codes and categories that emerged from the data using the six themes as identified in Table 3 above: the use of social media, information flow, leadership decision/actions and their impact, managing the message, the maturity and experience level of the leaders and followers, and the leader-follower relationship. The following provides insight into how these categories or themes were manifested in this study.

**Using Social Media**

The impact of social media in this situation was more implicit than explicit. There were three primary factors which contributed to this outcome: the ubiquity of and ease of access to information, the Canadian Forces social media policy, and the users'
experience with media and social media. The information access and flow will be discussed in detail in the following section. Here I will address the CF social media policy and the members’ experience and perspectives regarding media in general, and social media in particular.

The definition of social media that was used to develop and pursue this study focused on social networking sites such as Facebook. However, the participants indicated that they considered social media in much broader terms to include social networking sites, e-mail, and the internet. Essentially, anywhere they could reach out and retrieve or transmit information electronically. As Moe stated:

I’m not sure about social media but yeah … I don’t know the whole insides of it but a lot of people here are on. It’s an easy way for everybody to communicate. In the past, like when we have Unit Fund trips or something, I would send an email out to all the members. Some members don’t communicate that to their spouses as much as maybe they should but this, as soon as it’s out now, it’s out. It’s on Facebook ... and everybody knows. I’m on Facebook, but I can get better information elsewhere.

Facebook, Twitter and other forms of social media were not their primary means of communication as it pertained to work-related information. E-mail, secure networks, formal messages, and word-of-mouth were more relied upon for relaying information related to the operations or the work environment. This was due to a number of factors which will be explained in ensuing paragraphs. Social media was used extensively for non-work related exchange of ideas, information and personal communication.

Their personal social networks, sustained by e-mail primarily, were used by a majority to connect with their previous units or friends back in Canada. Facebook, in
particular, was used mainly for social events and sharing non-work related information, for reasons that will be explained later. From the data gathered, it was clear that this was due to two factors: their maturity level and the CF policy on the use of social media.

Every member of the CF contingent at Geilenkirchen was an experienced service member. Their time in the CF ranged from approximately ten years to over 30 years. Additionally, a posting to Geilenkirchen was considered a ‘plum’ posting, so, the members selected to go there were, as some respondents described them, primarily “high achievers” and “top tier” personnel. They also had to go through a fairly rigorous screening process after being selected to go but before they could depart Canada. This involved assessments for medical, social and psychological health, and personal and family stability. As one respondent put it, they were “stronger performers and understand the agency and the corporation better than others.” This was important because they were also seen as what a couple of participants termed as “ambassadors” for Canada.

This maturity level impacted this study in two ways. One was in terms of how they responded to the change (discussed later) and the other was in how they viewed and used social media. Although a majority of respondents indicated that “everybody” in the community was on Facebook – and 13 of the 15 indicated that they had a Facebook page – no one used it to discuss or find information about the withdrawal specifically. As ‘Oscar’, a junior member of the contingent on the support side stated “there wasn’t much requirement for it because of all the other sources of reliable information readily available” (e.g., Commander’s Call, BBQs, social events, etc.). This was a surprise as I
had anticipated Facebook to be a primary method of communication within the
Canadian community.

As it turns out it was; just not for work-related information. As Moe indicated "a lot
of people here are on" and this was confirmed by the majority of the participants
including Chuck, one of the senior leaders in the contingent, who remarked “Facebook?
Everybody was on it. We knew it but we didn’t use it for passing military information.”
Due to the maturity level of the members, the restrictive and quite clear CF policy on
social media (see Appendix C), and the constant awareness through Operational
Security briefings coupled with recent operational indiscretions by other members of the
NATO community\textsuperscript{15}, the Canadian personnel did not use Facebook (or Twitter) to
communicate about the withdrawal or any other work-related subject. To quote one
response by “Bill” a junior officer from the Technical element:

I didn’t really speak too much about social media because we don’t use it. I have seen some things circulate in the CF in terms of what was
acceptable to put on social media and stuff like that, and proper
behaviour and stuff. But we don’t put too much into it because we don’t
put anything on Facebook. We just don’t seem to use it. We say ‘Hey,
don’t do this’ and then we don’t officially use it. I wonder if we officially
used it, would they have to do more of that? Because you get this
perception that when you’re home or on your mobile phone, that ‘I’m not
at work. I can say what I want and get away with it.” ... We haven’t gone
there yet, because we’re not really using social media to pass that
information.

\textsuperscript{15} In the 18 months since the announcement of the withdrawal, there had been two significant breaches of
operational security through inappropriate use of social media by members of the NATO AEW&C Force. This
resulted in heightened awareness and reinforcement of security and social media through mandatory briefings and
other measures to raise the awareness of every member of the Force to the vulnerabilities of social media.
Another participant, “Karl” a pilot from the Operations and Training Wing, echoed Bill’s comments and added that “there was concerns raised about (social media) before we got to the withdrawal – about Facebook and security because we were in Afghanistan and other things.” Yet another respondent, “Abe” an officer from the operational squadron who had been an NCO earlier in his career said he was “leery to use social media because it made me feel like it was a mine field.” Chuck also indicated that he would caution his members who used social media “to ensure they restricted it to something they actually knew ...” and “to be careful what they post.”

Interestingly, the spouses and family members of the CF service personnel who were transferred to Geilenkirchen were also subject to the Code of Service Discipline while they were posted there and they were all made aware of that. What that means for the family and spouses of the military members is that if their spouse or family member acted in contravention of the Code they could be charged under that Code (including fines and imprisonment). An infraction would most certainly have meant an immediate return to Canada for the family. This awareness ensured that social media was not used by the family members for “official” business in any way.

That said, when discussing the initial announcement of the withdrawal, Abe remarked “It was all over the place on Facebook in a very short amount of time. Everybody asking “What’s happening?”” but this was not followed up with any sustained response or discussion thread – which is indicative of a mature, aware user of social media and the related policies. This adherence to security and policy was evident in the fact that Facebook was used extensively in the Canadian community but only to promote social events, trips, share travel experiences in Europe, etc. However, this
does not necessarily mean Facebook did not influence the leadership, as will be discussed later, it just indicates that the demographics of the population and the awareness of the potential dangers of social media impacted how and when it was used.

It is important to note here that within the Canadian Forces there exists a very risk-averse culture when dealing with media of any kind. The Somalia affair, in the mid-1990s, changed how the leadership and the CF in general regarded and related to the media. The excessively negative reaction of the Canadian public to the events and actions of the members of the CF in Somalia in 1993 changed how leaders within the CF made decisions.

Prior to the Somalia affair, it was rare that any CF activity made headlines or garnered much public interest in Canada. Consequently, decisions in the CF were made primarily based on operational requirements and the politics of the decisions were left to the very high-ranking officers and the elected government officials in Ottawa. When the spotlight was placed on the CF in the aftermath of the Airborne Regiment’s actions in Somalia, many of the internal ‘imperfections’ of the institution were exposed, and the leadership of the CF became acutely aware of the power and importance of the media. As a consequence, the term “Does it pass the Globe & Mail test?” became a common phrase in any decision-making process within the CF. The “Globe & Mail test” refers to the consideration of every decision-maker to contemplate the consequences of their potential decision and how would it look as a headline in a national media outlet such as the Globe & Mail newspaper.
This changed the culture within the CF at that time and it endures today. The Commander of CCNAEWF and most of the members of the contingent were in the CF during those difficult days. They remember the negative backlash from the public and media very well. (I was a member of the CF then as well and I remember it very clearly. They were very dark days for the military in Canada). CF members at all levels are now trained in how to deal with the media and about the importance of being cognizant of the potential media reaction or spin that could result from a military decision. This “Globe & Mail test” became a part of the CF’s decision-making process.

As a consequence, when social media emerged in 2004, it was viewed as yet another medium of which to be wary and to use with extreme caution. This was doubtless a factor in the development of the CF Social Media policy. The combination of this culture and the inculcated practice of adherence to policy (which is also a staple of the CF), were major contributing factors to the way social media was used by the members of the Canadian contingent at GK.

The relevance of these findings to the research questions of this study is examined in detail under Discussions of the Findings. In general, the findings on social media use within the Canadian contingent provide insight into how, when and why it was used by the members. Because social media was not used as a primary communication tool for work-related or withdrawal-related information, it had negligible direct effect on the leader-follower relationships within the context of the withdrawal. However, as part of the system which was CCNAEWF, there are other indirect effects that emerge in the following discussion.
**Information Flow**

The flow of information within an organization is key to managing the message (Maitlis, 2004, 2005) and ensuring organizational goals are met. Accessibility to social media impacts how information is made available to every level of an organization (Li, 2010; Sievert & Nelke, 2011).

In this situation, information about the withdrawal was available through a variety of formal and informal modes of communication including internet, internal e-mail and other correspondence, Commander’s Calls\(^\text{16}\), social functions, briefings by Supervisor(s), Canadian Forces Network (local radio station), word of mouth, etc. The formal communication was comprised of written, electronic and verbal communication from the leadership through the established chain of command. This consisted, as much as possible, of direct communication from the Commander to ensure that there was no misinterpretation of the message. In cases where the Commander was not able to deliver the message in person, his appointed Deputy would deliver the message after consultation with the Commander. Each instance of a verbal delivery was followed up with a corresponding e-mail for those members that were unable to attend and hear the message directly from the leadership.

The Commander developed his communication strategy based on, as he described it, “openness and capacity of information” – that is, they would control the flow of information only as much as deemed necessary and they would get what they knew out to the other members of the community as quickly as possible. Social media played a part in the derivation of this strategy in that the Commander was aware of

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\(^{16}\) Commander’s Call is term used to describe a formal briefing, usually given by the Commander to the entire corps of the contingent. It is considered a ‘parade’ in that attendance is mandatory, however operational and other reasons often preclude full attendance.
social media, its capabilities and inherent power to influence. They purposely did not use Facebook because they, in his words, “did not have control of what was on Facebook.” While social media was considered a factor in deciding to release information as quickly as possible, it was not the primary factor in this decision.

When questioned about using social media as a means of communicating, the members of the leadership team indicated that it was not discussed specifically. This was attributed (by them) to their age and their experience with using social media. Moe captured the overall sentiment in his response when asked about using Facebook as a method to communicate with the community:

> Not that I’m aware of – it was never discussed specifically. I don’t know if that’s … how do you say? The age of the leadership … I’m sure they are on it like so many people nowadays … I think that part of that is like we were talking about earlier how this is still a very tight-knit close community. You can get in touch with everybody here. You can get face-time almost with everybody here … I think maybe because of that there wasn’t much requirement for it or we never saw the requirement because of that nature. I think maybe back home on a big base or something, maybe it would have been different.

The fact that there were already well-established methods of communicating and that there was a pre-existing strong relationship within the community meant, as Moe indicated one “there wasn’t much requirement for it.” Dick, a senior NCO from the Tech element, when asked about the role of social media and how it impacted the flow of information, offered:

> I don’t know if social media had any effect. Well, maybe it did have an effect on it because he (the Commander) knew he had to stop stuff because as much as our generation doesn’t like getting into the playing
all day on Facebook or whatever, I think we are smart enough to recognize that it is happening and it just makes the rumour mill that much bigger, and that's a good way to squash it” (referring to the communication strategy adopted by the leadership team).

Additionally, the Commander had, in previous leadership roles, employed an open communication strategy to successful ends and so he was already inclined to use it in this instance. The Commander’s previous experience played a large role in the overall success of the transition and this will be discussed in more detail in the following sections.

Those on the receiving end of the communication strategy perceived the leadership to be very open and authentic with the information. They understood that they were getting the information as quickly and as accurately as the leadership team was able to convey it. There was a sense of a new approach to sharing information. As Karl remarked:

I think they were pretty up front with that ... in the past they hung on to information as a control mechanism or something ... but they (the leadership team at CCNAEWF) didn't do that. I can see the difference, do you know what I mean? Because people weren’t ... they weren’t as pissed off, they weren’t as heated about things. There wasn’t as much gossip.

The Commander repeatedly used the phrase “I’ll tell you what I know, what I don’t know and what I think.” This was appreciated by the followers as they were getting information that was timely, accurate and if there were questions, they were answered in a forthright manner – including being told if the leadership did not know the answer. The timeliness and accuracy of the frequent transmissions by the leadership team
worked well to obviate the need for gossip. As Grosser, Lopez-Kidwell, Labianca, and Ellwardt (2010) provide in three of their six functions of gossip: it can be used to share information, gain influence, and to maintain group values and norms. As gossip travels through informal communication lines, it tends to be quicker than formal communication. “It doesn’t matter how reliable the information is if a manager is getting it too late to respond effectively to it.” (Grosser, et al., 2012, p. 53). Intuitively understanding this principle of gossip and social media’s ability to promulgate it was a factor in the formulation of the communication plan by the CCNAEWF leadership. Collaterally, it helped strengthen the leader-follower relationship through the building of trust. It also reinforced the established group norms regarding the sharing of information and the adherence to policy and their own accepted modes of behavior.

As mentioned, this built up the trust level of the leadership among the members of the contingent as evidenced by phrases such as “I’d wait for it to come down from the Commander before I did anything,” or “information was coming from the leadership as quickly as they were getting it” and “I give him credit for his ‘open book’ policies.” These phrases indicate a perception that the leadership were doing all they could to support the members of the contingent. This built trust in the leadership among the followers. The aspect of trust will be explored more fully in the section on the leader-follower relationship.

The primary flow of information was from the leadership team through the established chain of command to every member of the contingent. The preferred method was through face-to-face briefings (formal and informal) followed by a repeat of
the message via electronic media (e-mail). Ivan described the information flow in this way:

As far as the flow of communication, I think it was effective on both sides (Note- here he is referring to the Ops side and the Tech side of CCNAEWF). The Tech element side seemed to be a little bit more, not seemed to be, they were definitely quicker to get information from top to bottom and then back again. We were always much quicker to respond than the Ops guys. The reason is the Tech side is very 8-4 type thing with the guys who work shift and maintenance of course, but it's still, you know ... We're here, where the Ops guys are always coming and going and their schedules are forever changing, that kind of stuff.

However, because the leadership at GK was not in complete control of the message, social media did affect how information got to the members of the contingent. On a number of occasions, a NATO member from another nation would present a Canadian service member with some new information the NATO member had received through another channel, either officially (via their embassy) or unofficially (via social media or other means). As one member, Karl related his experience upon returning from a deployment:

When I landed after coming home from the Sandbox¹⁷, I was met by my Italian buddy from Training Wing who said he had a Tweet from someone in his embassy that the Canadians were leaving at the end of the month – ‘Is this true?’, he said. I told him I didn’t know anything about it – but if it was true, I knew where to find out. He insisted it must be true because his embassy ... or someone there had said it was – or stuff like that ... I told him “Don’t count on it – unless you heard it from the Ops Commander directly because he is the one who knows” – he

¹⁷ ‘Sandbox’ is a colloquial term used by the Ops members to describe Afghanistan where they often deployed.
was pretty insistent though ... so I asked around the other Canadians
and they hadn’t heard a thing so I wasn’t too concerned ...

Interestingly, information received in this manner did not generate rumours or
heighten tension among the Canadian contingent. This was due to two factors: the
maturity and experience of the members, and the communication strategy of the
Canadian leadership. Both factors led to the members of the contingent not spreading
rumours or gossip. This aligns with Michelson, van Iverton, and Waddington (2010)
when they discuss gossip at an organizational level where context and trust are factors
in determining group norms regarding the accepted exchange of gossip.

In fact, when questioned about rumours and gossip during the interviews,
multiple respondents reacted quickly and negatively with comments such as “it was
more like speculation – it didn’t last long enough to be a rumour” or “there were more
questions than gossip” and “it wasn’t rumours as much as it was questions.” This
speculation and questioning appeared on Facebook but it did not spread because no
one knew the answers and because they were all too experienced to spread
speculation. This was reinforced by the Commander when he asked the members to “if
you can, stop the rumours on Facebook, or at least stop the spread.”

The leadership communicated what they could, when they could, but as is
common in times of change, and according to the respondents, there were “peak
periods of information followed by long periods with no information” so there was, as
they described it, “a lot of sitting back and waiting.” These periods of ‘no information’
caused some confusion and raised the stress levels of service members and their
families as speculation grew. As one respondent expressed initially “everybody had bits
of information but nobody had the clear picture.”
The leadership did a good job of managing the message and convinced the followers that they were getting everything, however the leadership did withhold some information that they deemed unnecessary to share with the members. These decisions were made to lessen the stress and to control the level of questions. Once the Commander gained their confidence and the message of clear and open communication was received and accepted, the contingent became more assured that, as Ivan described “they were giving us every bit of information they could.”

In contrast, and to highlight the effectiveness of the communication strategy within the contingent, on the periphery of the contingent were a number of other agencies affected by the withdrawal. One of these was the school attended by the children of the contingent members. Initially, the Commander did not include the school in the formal transmission of information. The school’s primary source of information came second-hand via social media. As with any re-transmission of information, there was some distortion of the message. The school, having no means to verify the information they were receiving, reacted quite differently from the members of the contingent. An example of this is how they reacted to speculation on social media regarding the departure dates for the Canadian military from GK.

Around September/October 2012, significant speculation rose regarding when the military members of the contingent would cease operations at GK. In formal and informal settings, it was a topic of conversation. This speculation was augmented by the presumption that if the Canadian involvement in operations ceased, then the military members would be sent back to Canada immediately. The speculation centred on Canada ending their financial contribution to the NATO AEW Force in February 2013.
Members of the school community, fueled by rumours on social media, believed the departure date was going to be in February (the middle of the school year). They began contingency planning to provide billeting and alternate transportation arrangements so the kids could finish the school year before returning to Canada. Basing their plans on speculation on social media, they rapidly developed options for each Canadian child. Planning was well underway when the Commander of CCNAEWF contacted officials at the school to advise them of the actual departure dates. This alternate reaction demonstrates the power of social media and emphasizes the effectiveness of the communication strategy used by the leadership of CCNAEWF.

The prompt and purposeful reactions and decisions of the CCNAEWF leadership regarding what and how to communicate proved to be very effective. Their awareness of the presence and potential of social media and its widespread use within the community, combined with their experience and the close-knit nature of the contingent, influenced their decisions. They knew they had to ‘stay on top’ of the information and rumours and advised their people to seek confirmation and to not spread speculation. The experience of the members of the community contributed positively to the outcome as they understood why and adhered to the direction/requests of their leadership. The culture of the institution provided a climate of risk aversion to media, which also contributed to the effective management of information despite the presence of social media. The implications of this are discussed further under Discussion of Findings.

**Leadership Decisions/Actions**

Recall that Hosking (1988) offered that one of the three most widely accepted conceptualizations of leadership is that it “has the effect of structuring activities and
relationships, and related sensemaking processes” (p. 152). The leadership team in this instance had the task of structuring the activities and managing the reactions of the Canadian contingent as it faced a major change (i.e., the withdrawal). As Kozlowski and Ilgen (2006) stated “... the team task determines the workflow structure and coordination demands (i.e., exchanges of behavior, information, etc.) necessary for accomplishing individual and team goals ...” (p. 80). Thus, in order to understand how and why the leadership made their decisions and the consequent reactions to these decisions by the membership of the contingent I focused on this as a key category in my analysis.

The leadership decisions surrounding the management of communications and relationships during this time of change were critical to the overall reduction of unnecessary stress and confusion, and minimize the potential for rumours. The key decisions fall into two main categories: 1) how to communicate internally and externally to the community, and 2) how to plan and execute the withdrawal. The experience level of the leaders and followers had a significant impact on the course chosen and the methods of communicating decisions and information.

The leadership decisions regarding how, what, and when to communicate were based on what the Commander called a “common sense” approach which is very much a reflection of his character. Repeatedly, in the interviews, across all categories of respondents, terms such as “focused on facts”, “consistent”, “clear”, and “open” were used as descriptors of the communication. This was intentional on the part of the leadership team and perceived as such by those in the roles of follower.

The intention to be open and consistent with their message was a conscious decision by the leaders. Harry, a senior leader and operator, said:
It was a conscious effort to try to stay on top of it ... anyone can recognize that this is a monumental event unfolding ... at least from the lives of the people that are here ... we wanted to assure in a conscious way proactively that, “Hey, when we get the information, we’ll let you know and we’re not going to wait for information. We’re actually going to push out to say please somebody tell us something.”

The leadership team remained in constant contact and checked with each other prior to the release of any new or supporting information. This was not a simple feat in the environment at GK due to operational demands, deployments, and other NATO duties which frequently required members of the CCNAEWF leadership team to be away from GK for extended periods of time.

Following the initial indication of the Government’s decision to withdraw, the Commander gathered his leadership team and they discussed options for handling the information. It was decided that the best policy would be an open and, in the words of Joe, one leadership team members “an authentic approach ... that dealt with every individual, individually.” The “strategy of openness and capacity of information” as they termed it, included providing what they could to their constituents in the clearest possible manner available to them.

This did not mean, however, that they would let everyone know everything; rather it meant they would release as much information as they deemed necessary and that they could confirm. An example of this was the letter from the Prime Minister. The team decided that they would not release the letter to the contingent, but they would interpret it and pass on the message and intent of the letter to the CCNAEWF members. The rationale for this decision was that the letter could fuel rumours and resentment among
the members and according to one leader “there was no gain to be had from having a letter signed by the PM floating around who knows where.”

For all other rumours, the Commander decided that he would tell them, in his words, “what I knew, what I didn’t know and what I thought it meant”. This proved a very effective communication and leadership tactic as the membership, who already had a high degree of trust in the Commander, responded with comments such as “he gave us every bit of information he could,”, “they gave us all they could at the time” and “he reassured us.” Karl, a junior officer from the Operations side summed it up quite well in his response:

Once we reached a point where it was well-known that this was going to happen, information flowed, I would say, quite quickly and directly. At no time, or not very much time anyway, did the Commander or the command team know something and we weren’t informed.

The Commander felt that the last part of his approach “... and what I think it meant” was especially effective in controlling rumours and managing the message. The Commander was well-known for his experience and he had a well-earned reputation as one respondent called him “a straight shooter.” This held him in good stead with the members and when he told them ‘what he thought it meant’, that, according to the Commander “seemed to satisfy them, for the most part.”

At the initial meeting, the leadership team decided to hold an “ad hoc” Commander’s Call as soon as possible to announce the Government decision to withdraw from the NATO E3A program. This was out of the normal sequence for Commander’s Calls, which were scheduled at regular intervals (approximately 6-8 weeks) published well in advance. By holding one out of sequence, they sought to stem
the speculation and to indicate to the membership the significance of the announcement.

The leadership team understood that they did not have complete control of the situation and that decisions were being made without their input or consultation. As one leader remarked “despite being puppets on a string, we decided to control what we could – the situation and people in Geilenkirchen.” Given that they, the leadership team, were also being impacted by the decision, it was easy for them to relate, understand and sometimes pre-empt the reactions of the contingent members. This provided the members with perception of strong leadership – as Dick, an NCO technician said, “it was very clear who was in control of the people – them!” (meaning the CCNAEWF leadership team at GK). This strengthened the trust of the members in their leadership team and as consequence, instilled a sense of obligation on the leaders to supply accurate and timely information.

Once the initial message had been transmitted and the fallout managed, it fell to the leadership team to manage the withdrawal. There was very little direction coming from Air Force Headquarters regarding the withdrawal itself because as a number of the leadership team indicated “they were caught off-guard” by the political announcement as well. Understanding the military as he did, the Commander knew that it would, as he stated “be better to propose a plan than to wait and have one imposed on us.” Consequently, he and his leadership team began the process of designing a withdrawal plan that would minimize the impact for everyone involved – the people, the governments, NATO, and the operations at GK.
They designed an initial withdrawal plan that would phase out the Canadian participation at GK over a three-year period, by re-deploying 33% of the contingent each year starting in the summer of 2012. This plan was proposed to the leadership at Air Force headquarters and at National Defence Headquarters where, after some negotiation it was accepted with minor modification of the phases to 30/40/30\(^\text{18}\) to provide clear indication to the Canadian Government that their direction was being actioned.

In order to determine who would leave GK when, they conducted a survey of all the members of the contingent and asked them about their personal circumstances and their operational job. This survey was done primarily through face-to-face interviews with each of the members by their direct leaders throughout the CCNAEWF chain of command at GK. They considered all aspects of the impact to the individual and to the operation including personal, family, financial, schooling, time at GK, importance of position to the operation, ease of replacement, training, etc. This garnered considerable respect and support for the leadership decisions when the plan was implemented. As Ivan noted:

> he was doing the best he could to keep people here as long as they could and at the same time support the Component. It’s just not about people, it’s about the mission. It’s a balance between the two.

By asking each individual and showing respect for their concerns, the leadership gained considerable respect and trust from the membership. This inclusive approach garnered comments from respondents such as “our plan worked well”, and “I think it

\(^{18}\) 30/40/30 refers to the phased withdrawal of 30% of CCNAEWF personnel in 2012, 40% in 2013, and the final 30% in 2014.
worked well for all of us.” The language (‘our’ and ‘us’) they were using in these responses is indicative of the ownership and attachment to the plan and to the community. As one respondent, Moe summed up:

No one was left out there. We were all in this together ... in the same boat. The leadership was doing as best they could to keep us informed ... we will deal with it together as a group. I think that perspective allowed us ... as frustrated as some were, and disappointed and all that stuff, to understand that the leadership was doing the best that they could.

Striking this balance by including everyone’s input was the masterstroke of the leadership team. Through inclusion, participation of, and consideration for the multiple actors and factors in the equation, they developed a plan that was acceptable to all parties and, even more importantly to some respondents once it was developed “they stuck to it.” This helped engender confidence, respect, and trust and further strengthened the leader-follower relationship.

The leadership decisions and actions of the CCNAEWF Commander and his team had the intended effect of structuring and giving purpose to the activities and strengthening the relationships within the contingent (as per Hosking, 1988). By managing the flow of information and formulating a plan through inclusive involvement of all their constituents, the leadership team were able to develop a sense of purpose and pride within the community to “Finish Proud, Finish Strong” – the mantra adopted by the contingent as they handled the withdrawal. This message, initiated by the leadership, became a key tool in enabling them to make sense of the situation and to
motivate their followers. This will be discussed in further detail in the Managing the Message section that follows.

**Managing The Message**

Message management and sensemaking are interactive, narrative processes that involve interpersonal and organizational conversations and communication using all manner of personal and social communication – verbal, non-verbal, written, and (applicable to this study) electronic (Balogun & Johnson, 2005; Gioia & Chittipeddi, 1991). Despite not having complete control of the information due to social media and other sources (e.g., from other nations), the leadership were able to manage the message quite effectively during the period of the withdrawal.

From the start they made the decision to, as the Commander described “get a grip on this” and “to spread the word that “we don’t know the facts” and “to be patient.” The leadership team worked closely together to manage the message and to control speculation. This enabled the leadership to retain the role of sensemaker for the contingent membership. They used face-to-face briefings or meetings as the primary means of communication because, according to George, a key member of the leadership team:

It’s difficult to put things in writing, because when you send out an e-mail, it’s sent. You have to choose your words very carefully but you can never choose them carefully enough. You can’t convey tone; you can’t convey body language in an e-mail.

The leadership team were in agreement on this point and the Commander indicated in his response during the interview that he was “reluctant to put too much in an e-mail or
Facebook, other than acknowledge facts.” This was supported by my observations during the study.

The Commander stressed the importance of the leadership team all being on the same message consistently and a protocol for transmission of information was established. The phrase “here’s what we know, here’s what we don’t know and here’s what I (we) think” was repeatedly mentioned by every respondent on the leadership team and the majority of the followers who participated in the study. By being the ones who delivered the message – in the terms and manner that they wanted it delivered to their members, the leaders were relied upon by the followers to make sense of what was going on and construct the reality for their followers. As one follower, Ed, a senior NCO in a support role offered:

It got so as I would wait until I heard it directly from my Chief – who always got it from the Colonel. There were lots of people saying lots of things at different times, but once I went to the first Commander’s Call and then heard the Colonel talk at the barbeque, I said to my wife, “Let’s just wait to see what the he says from now on.” She liked that idea because on the spouses’ net and Facebook and stuff there was always somebody saying something, so she was pretty mixed up at first.

The Commander expressed his focus about staying on message during the interview when he described how he was cognizant and always, as he said “making sure that all of the senior leadership were on the same message. This is what we know. Does everybody understand what we know and what our message is?” Each time before the leaders within the chain of command were faced with questions or had new information to transmit, they checked with the Commander or his appointed Deputy
before answering or transmitting any information “to ensure we were all on the same page,” a phrase used repeatedly by a number of the leaders interviewed. When asked if they ever felt if they (the leadership) lost control of the message Harry replied “I don’t think so. I think the benefit was that we stayed with the same message the whole time – “we’ll tell you what we know, what we don’t and what we think it means.” It seemed to work.”

In addition to the managing of speculation with requests from the Commander such as “if you can, stop the rumours on Facebook, or at least stop the spread” and controlling information with directives like “if you don’t hear it from me (or the chain of command) then do not repeat it until confirmed,” the leadership team developed a core message that carried the contingent through until the end of the withdrawal: “Finish Proud, Finish Strong.” This was a rallying point for the members of the contingent to show the professionalism and dedication of not only them but of all the Canadian service personnel who had served at GK. This strengthened the social identification within the contingent.

Tajfel (1982), citing his earlier work, defines social identity as being “that part of the individuals’ self-concept which derives from their knowledge of their membership of a social group (or groups) together with the value and emotional significance of that membership” (p. 24). He adds that within a social organization there exists a “need to preserve or achieve a ‘positive group distinctiveness’ which in turn serves to protect, enhance, preserve, or achieve a positive social identity for members of the group” (Tajfel, 1982, p. 24). Within CCNAEWF, this identity was multi-layered – one from the institutional values and norms of the CF and strengthened by the pride and uniqueness
of being in the Canadian contingent in GK. Bob described the connection to the CF very well when he stated:

What’s interesting is that I’ve always viewed being in the military as something that’s 24/7. If I go downtown, I cannot act like I’m not in the Canadian Forces. And not just being here in Europe, but even back home. I can’t go downtown and act like a hooligan or whatever else ... because I’m expected to carry myself in a certain way, because I’m in the Canadian Forces. With social media, I look at it and say it’s the same thing. You can’t get on social media and trash the CF or the government ...

Within CCNAEWF, there was a pre-existing social identity that was generated and cultivated over the 30+ years that Canadian Forces had been with the NATO NAEW Force. Throughout those years, Canadians had established themselves as a reliable, high-quality, and hard-working member of the Force. One who readily assumed a leadership role and set the standard for operational effectiveness and community involvement. Canadians at GK were widely recognized for their contribution and professionalism and they took great pride in that reputation.

The announcement of the withdrawal threatened this identity by shifting the focus from operations and the NATO mission to more personal concerns as expressed earlier in the description of the reaction to the announcement. The leadership recognized the danger and re-focused their followers on maintaining their high standards and leadership role within the NAEW community. The mantra “Finish proud, Finish Strong” was a rallying ‘cry’ for the remaining members of the contingent to uphold the well-earned reputation of the Canadian contingent and maintain it through to the last mission and the final departure of the Canadians in August 2014.
Hogg (2001) addresses this as a method by which leaders can be effective by affecting the social cognitive processes in which followers “conceive of themselves in terms of the defining features of a common and distinctive in-group (i.e., self-categorization, or identification, in terms of the in-group prototype)” and/or “cognitively and behaviorally assimilate themselves to these features (i.e., cognitive and behavioral depersonalization in terms of the in-group prototype producing in-group stereotypic or normative perceptions, attitudes, feelings, and behaviors)” (p. 186). The leaders of CCNAEWF effectively utilized the established social identity of the group to motivate and focus their efforts on achieving the desired organizational goal to “Finish Proud; Finish Strong.”

In addition to being the ‘message’, it was also a control mechanism in that it encouraged every member to manage themselves and what they said and did with pride and professionalism. This included not sending messages on social media, responding to Tweets, and reacting to information from “outside” sources. The leadership team managed this message particularly effectively, repeating it at every formal and informal meeting with the personnel of the contingent and displaying it on their correspondence.

The actions of the leadership to “get on top of” the message and maintain the role of sensemaker within the CCNAEWF community was a key factor in reducing or eliminating the potentially harmful effects of social media. By advising and directing their membership to “stop the spread” and then becoming the most reliable source of information, the leadership were able to refocus the attention of the membership to finish the Canadian presence at GK as they had started and built it – proud and strong.
This was particularly effective and made even more so because of the maturity level of the followers, which I will discuss in more detail in the next section.

**Maturity and Experience of the Leaders and Followers**

The Situational approach to leadership (Blanchard, Zigarmi, & Nelson, 1993; Hambleton, Blanchard, & Hersey, 1977; Hersey & Blanchard, 1988) suggests that the developmental level of the followers has a significant impact on the effectiveness of different styles of leadership in particular situations. In the change situation under study, the maturity and experience of the leaders and followers was a significant factor in how the leadership approached the situation. Due to the high levels of capability and confidence of the followers to do their primary job, the leaders appropriately adopted a delegating style. This approach was used for the majority of situations at GK however, in instances when the factors and consequences were less well understood but the commitment of followers remained high – such as the withdrawal – the leaders had to adopt a selling or telling style of leadership. In a similar fashion, the maturity and experience of the leaders and followers at CCNAEWF impacted the use of social media and mitigated its effect on the situation.

As previously stated, every military member of the CCNAEWF had at least ten years of service and some had over thirty years in the Air Force (e.g., the Commander had 34 years of service). In addition to time in the service, they also had a breadth of experience and expertise that set them apart as above-average achievers, and accomplished administrators, technicians or operators in their area of specialty. This depth and breadth of experience, and the requisite age needed to gain that experience
had a direct impact on and reduced the anticipated use of social media as described earlier.

It also had a major impact on the leader-follower relationships within CCNAEWF. The followers’ reaction to the announcement of the withdrawal and their subsequent response to being involved with the plan are clear indications of the maturity level and experience of the participants. Comments such as “he’s been through this before”, “I’ve got 21 years in the military, not much surprises me anymore”, and “it is what it is, we just have to soldier on” are indicative of the reactions of the contingent members. As one member of the leadership team, George, remarked about receiving and delivering unanticipated news:

This is what we do – we deal with asymmetric information all the time. Military members tend to absorb it and reflect on it. They are used to having abnormal information being passed to them and they are very good at coping with unusual information.

This helps explain why rumours were not propagated through social media or other social networks. It also contributed to the strength of the leader-follower relationships extant at GK.

The maturity and experience of the followers was complemented by the maturity and experience of the leaders, which resulted in good communication and a measured reaction to a very traumatic change. The members, as one respondent described “sat and waited, but did not panic” because they had a level of trust that was reciprocated by the leaders in their strategy to provide (almost) complete disclosure to their followers. This strengthened an already strong relationship and resulted in a very successful implementation of “their” withdrawal plan.
The Leader-Follower Relationship

The relationships that existed between the leaders and followers within CCNAEWF were already well-established and quite strong prior to the announcement of the Canadian withdrawal from the NATO E3A program. The Commander arrived at GK approximately one year prior to the announcement of the government decision to withdraw from the NATO E3A program. This enabled him to establish his credibility and build trust among the military members and their families at GK. During the time prior to the major change, he built the relationships that were critical to the successful leadership demonstrated during the withdrawal. The Commander expressed the importance of building the leader-follower relationship when he said:

I think it’s important when you have opportunities to talk to people to tell them what’s on your mind. To tell them what you see from your level of the organization where you see things going, where you see things that might influence them or interest them. Sometimes you tell them more than you really need to, in my opinion, but that’s okay because it helps them to get to know you, and it helps them trust you so that when you do make decisions that affect them without consulting them, hopefully they will default to “Well, every other decision he’s made when he’s talked about it, I understand where he’s coming from, I trust him.”

From the perspective of the members of the contingent, the relationship with their leadership was already strong prior to the start of the withdrawal. As Bill remarked during his interview when asked about the leadership at GK, “I felt like there was a steady hand on the tiller” and this reflected the sentiment expressed by the majority of the followers. When questioned about that relationship, other respondents offered comments such as “I had a really good relationship with ...”, “I could talk openly with
them”, “I got a very positive sense of reassurance that the chain of command here had our best interest in mind”, “the boss is always very approachable”, “I've never seen this type of cohesiveness in a unit” and or as Oscar summarized:

The level of trust was very high when I came here because of the reputation of the officers being very professional and even the Colonel was held in very high regard at every rank level and position. This was echoed by Ed, an NCO on the support side, when asked about his trust in the leadership, he said:

That’s how I built my trust with him was that when I approached him with the rumours and he would say, “Oh yeah, that rumour got started because of this or that was going on” he painted the picture and connected the dots for me and I said, “Okay, I can see that.” I think that really helped in building the trust and me realizing that yeah, I did trust them all.

This is important because, as the Commander said, “if people know you and trust you when everything is okay, then hopefully, most of them will trust you when things aren’t so okay.”

Reciprocally, the leadership had a high degree of trust in their people. The overall tone of the response in the interviews was one of mutual respect and from my observations, this was reflected in how they interacted with each other on the base. One leader from the Ops element, Liam summarized the prevailing sentiment when he responded:

I think if anything it just reaffirmed for me how good they all were. People didn’t get really negative or anything, they maintained a good attitude. We were able to speak openly – everybody was really reasonable about expressing their concerns and questions and
particulars, specific priorities and so on. It made it as easy as it could possibly be, really – when you get it right.

This strong bond amongst the members at all ranks of the Canadian contingent helped them deal with the major change with which they were faced. As stated, the social identification amongst the members of the contingent was quite strong – fostered by their pride in what they had accomplished operationally and how they represented Canada professionally. As Pratt (1998) indicates when an individual’s perspective of a group is reinforced, they base their own personal schemas on belonging to that group and associating with the achievements of the group as their own (see also Wang, et al., 2005). The leadership team was intuitively well aware of the connection and took that into account when devising their communication strategy and when developing the withdrawal plan.

When devising an approach to developing the implementation plan, the Commander directed them to “understand the hopes, wishes and dreams, aspirations of all your people” so they could develop a plan than minimized the impact on each individual as much as possible. The followers were aware of this (each one was interviewed) and responded by providing their support for the withdrawal plan – “it was the best plan possible and people understood it was”, “the plan overall ... was widely accepted as a good plan” and “people were supportive to say, you know what? We understand and support what we had to do.”

It was these close ties within CCNAEWF that obviated the need to turn to social media as a primary source of information. As Moe remarked, when asked about why social media was not a bigger factor in the community’s reaction to the withdrawal, “it
was because of the communication opportunities and the close-knit community, there wasn’t much requirement for it.” This was evident in the communication strategy and in the way the members responded to directions regarding social media and the rumours/questions that emerged on it. The pre-existing close ties also were evident in the readiness with which the “Finish Proud, Finish Strong” mantra was embraced.

The strong leader-follower relationship that existed was built on a mutual trust that had been cultivated over many years in the military and during the time at Geilenkirchen. The aforementioned maturity and experience of the leaders and the followers also contributed to the reciprocal bond of trust that existed. Research on change management has shown that when faced with major change, unless an inclusive approach is adopted by the leadership, members tend to become demotivated, risk averse, and resistant to the change (Allen, 2003). Thus, it might be expected that the member’s level of trust would decrease or waver and they might turn to other sources of information (e.g., social media) in times of uncertainty.

However, the opposite occurred in this situation. The strong bonds and high level of trust were actually strengthened due to the inclusive and open approach implemented by the leadership team. When queried on trust levels, respondents in the ‘follower’ category offered “I think the bond of trust was even strengthened because of his actions...”, “I would say it (the level of trust) rose”, “I think that it (honest communication) really helped in building the trust”. Similarly, from the leaders’ perspective responses included “I think it went up ... I know I gained a lot of respect for [them] because of the way [they] handled it”. This was attributed to the open and
authentic communication and to the inclusive approach to planning used by the CCNAEWF leadership team at GK.

The combination of an open communication strategy, highly developed connections to the institution and the unit, and strong levels of mutual trust resulted in a cohesive and effective organization that faced major change with little additional undue stress. This negated the potential negative impact that social media could have produced and has in other such situations. The cultivation and maintenance of the strong bonds between the leaders and followers in CCNAEWF was direct result of the actions and reactions of the leaders and the followers. As Liam offered, “It made it as easy as it could possibly be, really – when you get it right.”

This chapter provided detail on the data analysis process and how I took an iterative and reflective approach during and after the data collection process. It then describes how I developed initial codes and refined them until I was able to develop six main categories from the wealth of data collected. These six categories were used to conduct the analysis starting with a discussion of the general findings and leading to a description of the categorized findings. This section of the chapter examined the data in relation to the six categories that emerged from my analysis. Taking this information and analysis in a larger context, I will now consider the data and how it can inform responses to my research questions. This is done in the Discussion of Findings section of the next chapter – Concluding Material.
CHAPTER 5 – DISCUSSION and CONCLUSION

Introduction

In this concluding chapter, I provide detailed answers to the Primary and Secondary research questions from the data gathered during this study. Before doing that, I offer a brief overview of each of the preceding chapters to situate the research questions and their corresponding answers that follow. In the final section of this chapter, I reflect on my personal perspectives and experiences during this study and then present what contributions can be derived from this study. Lastly, I offer some implications and potential avenues of future research.

How I Got Here

From my initial questions and curiosity about leadership in the presence of social media that emerged from witnessing and hearing about numerous disparate instances around the globe, I developed a primary research question “How is leadership conducted in the context of social media?” I then developed a plan of research by identifying a unique opportunity to study leadership during a time of change in an environment where social media was widely used – the RCAF unit (CCNAEWF) in GK. I chose this unit for specific reasons but most importantly because I saw the military (CF) in general as a prime candidate to explore how leadership is conducted in an industrial age institution now that social media has been introduced to the context. My assumption was that a bureaucratic institution would find including social media into their well-established protocols and procedures a challenge. I further refined the scope of the study by defining the major terms and describing the context in Chapter 1.
Chapter 2, Literature Review focused on positioning this study in the extant literature on leadership and social media. In this chapter, I provided a review of the relevant aspects of the leadership literature through an examination of leadership and relationships, trust, influence, and perceptions which included the connection to the leader as sensemaker. I also reviewed the body of leadership knowledge at it pertains to leadership and information sharing, and leadership communications as they become germane to this study in the connection to social media. By focusing on the relational aspects of leadership and these related areas of research, I was able to identify a gap in the literature that involves the consideration of leadership relationships in the context of social media.

The second part of Chapter 2 focused on a review of the literature on social media and I provided a connection to the leadership literature by examining similar areas of interest – communication, information sharing, and relationships. The literature review revealed a strong connection between these two bodies of knowledge and a lacuna where the connection between the two has not been developed. The research questions I included at the end of this chapter were designed to address this gap.

Having established the focus and rationale for my study in Chapters 1 and 2, I then turn to explain how I approached and conducted my study in Chapter 3, Methodology. In this chapter, I provide an account of my research philosophy and assumptions. Here I explain how my constructivist ontological perspective is in concert with other researchers who view leadership as a relational process. Combining this with an interpretive epistemological stance led to my selection of a quasi-grounded theory approach (as per Charmaz, 2006) to this study. This informed the development of my
interview instrument and the approach I took to gathering qualitative data. Additionally, I described my personal connection to the study and discussed how this may have introduced biases in the gathering and interpretation of the data.

In the next part of the chapter, I provided a detailed description of the methods I used to gather the data during the study – including semi-structured interviews, qualitative observations, and document review. The grounded theory approach was used to describe how and why I developed and modified my methods during the data collection process. As themes and new avenues emerged, I was open to exploring them in more depth and revisiting previously collected information to determine any connection. This iterative, interdependent process is described in detail and led to the development of codes and categories that were used in the data analysis that followed. I concluded this chapter with a discussion of the ethical considerations and other challenges that I faced during the conduct of this study.

In Chapter 4, I described in detail the data analysis process. I began with a description of the process I used to analyze the data I had collected during the study. I explained how this analysis process was on-going and iterative as it began from the first interview and continued through the data collection process, with each new piece of information affecting my perspective on the data already collected. This process was followed until my initial codes emerged and these codes were refined and themed until six categories were developed. The six categories are Using Social Media, Information Flow, Leadership Decisions/Actions, Managing the Message, Maturity and Experience of Leaders/Followers, and the Leader-Follower Relationship.
I follow up the description of the six categories with an explanation of how, due to the homogeneity, representativeness of participants, and the repetitive nature of the data being collected, I considered it sufficient and that a saturation point had been reached. I then described some general finding from the data including a sequence of events around the major change, how the members of CCNAEWF reacted to the change, and how the scope of the change affected all members of the contingent. This provided a context in which I could then provide an account of the categorized findings of the study using the six categories I had developed. These findings offer some intriguing implications for consideration in addressing the research questions of this study.

**Discussion Of Findings**

To focus the discussion on the implications of these findings, I return to my Research Questions and seek to address them using the data gathered during the study. The primary research question *How is leadership conducted in the context of social media?* can be answered by developing responses to the secondary questions:

1.a. How is the communication and information flow within an organization conducted in the context of social media?

1.b. How is the influence dynamic within the leader-follower relationship realized in an environment where social media is readily available?

1.c. How are participants’ perceptions of others within the leader-follower relationship affected by the presence of social media?
1.a. Information Flow

A well-managed flow of information is a critical element in the ultimate success of an organization (Dutta, 1997; Senge, 1990). The introduction of social media has direct consequences for managing the flow of information and managing the message that the leadership intends to generate from that information (Li, 2010). The consequences of immediate and widespread access to information for leaders are complex and varied. In the context of this study, an open communication strategy worked well due to a number of factors that are worthy of exploration in more detail.

In order to understand how the information flow was affected by the presence of social media, it is required to know how it flowed under normal circumstances and determine the differences. The normal ‘flow’ or rhythm of communications within CCNAEWF had a regular pattern. Commander's Calls (CC) were used as the primary means of transmitting information to the military members. They were also used as an opportunity to recognize achievements (medals, awards, etc.). Usually they were held on a pre-scheduled basis approximately every 6-8 weeks and consisted of a formal briefing by the Commander or a designate, followed by an information session with a question and answer period. The second part of the CC was opened up to the spouses and families of the military members, when the medals and other awards were presented to the member in front of their family and community. Normally, attendance at a CC (although a parade\(^\text{19}\) was around 50-60\% of the contingent members.

\(^{19}\) In military terms “a parade” means attendance is mandatory by all available personnel, however, this is not strictly enforced in most instances.
Routine and daily information and correspondence was done primarily by e-mail, through the established systems on the base. For CCNAEWF, there were three separate email systems: the regular NATO e-mail system for daily NATO and operational information traffic, the BASS secure system for the passage of classified information, and the Defence Wide Area Network or DWAN, an exclusive Canadian network used primarily for communication with other Canadian military installations and personnel.

Information within the Canadian community at Geilenkirchen was also passed informally during the monthly community barbeques held at the Support unit, and at other social functions. These were used primarily for social news and events such as departure and arrival celebrations. There was usually no formal structure or briefing associated with these events.

Under normal circumstances, information received by the Commander and his leadership team that was of interest or import to the rest of the contingent would be reviewed, processed, and then disseminated as required and appropriate. If it was of any significance but not of immediate importance, the announcement or information would likely be saved for briefing at the next Commander’s Call. If the Commander was not available or present, his Deputy or another leader in the senior echelon of the contingent would publish or push the message, often without his pre-approval. The normal method of dissemination for routine information was via e-mail.

In the case of the withdrawal, the concern about “getting a grip on this” and “keeping speculation down” was paramount as the leadership team understood the
significance and impact this information would have on the contingent and community. Although they did not expressly consider social media in devising their communication strategy, it is clear from the comments of each member that they were aware of its presence, capability and potential for meaning making. Comments such as “it’s out there, you have to be aware of it”, “Understandably, they have what they want on the Internet and that’s how they get it” and “social media in general terms … has changed things dramatically for a military leader” echoed the sentiment repeatedly expressed by members of the leadership team in responses during their interviews.

The Commander had considerable military experience and had successfully used an “open and authentic” communication strategy previously in his career and so he favoured that approach instinctively but did acknowledge that social media was “helping the jungle drums beat quickly on the drummer side as opposed to on the answer side …”. The combination of the significance of the information regarding the withdrawal, the availability of the information through other sources (including social media), their prior knowledge of the power of social media, and the Commander’s preference resulted in a revised communication strategy that was “open and authentic” and proactive. In his words “it was important to actually get out in front of everybody and to talk about it … and just look everybody in the eye to do it face-to-face.”

Evidence of the revised ‘open and personal’ policy can be seen in the ad hoc holding of an unscheduled Commander’s Calls, the increased frequency of CCs, briefings by the Commander at social events and a consistent managing of the message by now having to clear everything through Commander before dissemination. As one respondent noted, “I always checked with [the Commander] before going to my
people” and this was echoed by the Commander when he consistently asked, “Do we all know what our message is?” during his frequent leadership team meetings.

Further evidence is provided by the addition of the Commander making announcements and answering questions at social functions such as BBQs and community events. All briefings were followed up by an e-mail and every member of the leadership team directed each of the “subordinate” leaders on their respective teams to ensure that all members were informed and all questions answered or brought to the leadership. Additionally, to minimize the potential of confusion and ensure their message was heard, members of the leadership team personally met Canadian members returning from deployments away from GK. This was out-of-the-ordinary, but this ensured that the military members heard it directly and could ask questions of the leaders.

This strategy was implemented very effectively as evidenced by the comments from the followers, “I knew as much as they had available” and from the leaders, “I think the communication flow was good … people knew we cared, and that made a winning combination – open and trusting climate.” It was also evident in the increased attendance at CCs (over 80% at times) and the reliance on the Commander’s word, and the lack of turning to other sources, such as social media. The open and authentic communication built trust, developed respect and improved the relationships. As one follower remarked, “I respected them even more for how they handled it” and this was reflected by Liam, a leader who offered, “It just reaffirmed to me how good they all were …”
To demonstrate how it could have gone, one only needs to look at the school that the children of the military members were attending. Lacking the immediate and close connection (and frequent updates) with the CCNAEWF leadership team, the school staff relied on multiple sources of information and speculation fueled by Facebook and Twitter. As described earlier, this caused confusion and unnecessary reactions in a very short period of time and the Commander of the contingent had to personally contact the School leadership and provide them accurate information. Without the benefit of the close connection, strong relationship and open communication that existed within the Canadian contingent at GK, the school reacted quite differently to the information that was available via social media and the social networks.

Social media, as another tool in the communicator’s box inherently has the capability to impact the flow of information. “[O]ne goal of communication is the resolution of ambiguity and reduction of uncertainty, and nothing is more confusing than contradicting messages across different channels” (Kaplan & Haenlein, 2010, p. 65). Thus, social media must be considered and integrated into any effective communications strategy. The CCNAEWF leadership team did this instinctively. As mentioned, the experience with the media and the development of a media-wary culture on the CF combined with the constant briefings and reports on operational security breaches through inadvertent social media leaks produced a healthy respect for the power of social media. Having learned of and experienced the capabilities of social media for almost a decade, their establishment of an open and inclusive approach to information sharing obviated the need for their membership to turn to alternate sources,
such as social media. These findings provide empirical evidence of the effectiveness of an open and inclusive communication strategy in the presence of social media.

1.\textit{b. Influence Dynamic}

In the past, knowledge and information have been associated with power – having one generates the other (Gordon & Grant, 2004) and leaders have used information and controlled its dissemination through various means in order to manage the message and retain the position of ‘sensemaker’ for the organization (Maitlis & Lawrence, 2007; Morgan, 1986; Smircich & Morgan, 1982; Weick, 1995). With the introduction of new technologies, including the internet and social media, leaders have very limited ability to maintain exclusive access to information (Kaplan & Haenlein, 2010; Li, 2010). This has necessitated a change in how power and influence through control of information are wielded in an organization. The situation under study is a good case in point.

Upon receipt of the official confirmation that Canada was indeed withdrawing from the NATO E3A program, the Commander and his team met to discuss their approach and agreed on a “strategy of openness and capacity of information.” They recognized the need “to get in front of this otherwise it’s going to get out of control” and to “get a grip on this” as soon as possible because their members were already getting information from other sources (e.g., radio, other nations, back home, etc.). Rumours and speculation were already starting to circulate and so a Commander’s Call was scheduled as soon as possible. In the Commander’s words, “It was, I thought, important to talk to the people face-to-face as soon as we could.” This was done so that he (the Commander) could tell the majority of the CCNAEWF contingent the news directly and
more importantly, to advise them that “if you didn’t hear it from me or from a member of
the chain of command ... saying it was from me, don’t believe it. It may or may not be
ture, but it’s not fact until you hear it from me.” His initial message was “to be patient”
and “if they have concerns to raise them to him or through the chain of command.” He
immediately adopted the “I’ll tell you what I know, tell you what I don’t know and I’ll tell
you what I think” approach and added “And if you’re not sure, ask. Because it’s
important to understand.” In this way, despite not having control of the information (or
even the higher level decision-making) the leadership of CCNAEWF were able to
maintain the trust of the members of the contingent. This becomes critical in an
environment where access to information and social media is uncontrolled.

When asked about social media, and its impact on their decisions and approach,
the comments from Harry were reflective of the majority of the leadership team, “my
view as a leader is that social media in general terms, not about this event itself, has
changed things dramatically for a military leader.” Harry went on to offer a more
philosophical perspective that also reflected the views of the others on leadership team:

... it has so dramatically changed how a leader views his people. His
people below him are as well-informed if not better, as well-educated ...
within reason, as well-educated, if not better. The old days of the leader
from on high passing out a message and, ‘don’t worry lads, I’ll get back
to you’ ... it doesn’t work. That dynamic doesn’t work anymore. I don’t
think. They’re so well-informed. You have to treat them not as equals
but you certainly have to ... treat them that they know. All you can do is
just again, be as truthful ... as possible, people can see that.

However, when questioned specifically about social media in this situation, the
Commander and others on the leadership team offered, “I wouldn’t say I gave it a whole
lot of thought at the time” and “it never came up,” however, in the course of their responses and descriptions of how and why they chose to do what they did and when, the presence and potential ‘threat’ of social media were already a part of how they approached communicating with their people. They were already aware and had adjusted to the presence of social media over the years prior to the withdrawal. Comments such as those from Joe, a senior leader on the Tech side, “I think everybody wants to have things immediately. That's also another characteristic of this day and age,” or as George stated, “they have what they want on the Internet and that’s how they get it. I think with social media being what it is, ... it’s going to cause more stress on the leadership because you’ve got to forever be on top of them about the nonsense that gets put out there.”

The decision to 'get out in front' of the rumours and reduce speculation by being as open, honest and transparent as possible worked well in terms of maintaining (and even, elevating) the level of trust within the leader-follower relationships in the CCNAEWF community. By doing so, the leadership team was able to show the followers that they were giving them all they had as quickly as they got it. This enabled them to maintain their position as the most reliable and trustworthy source of information in the perception of their followers. Hall, Blass, Ferris, and Massengale (2004) state that, “followers will be more likely to make positive attributions of the intentions of their trusted leaders” (citing Tyler & DeGoe, 1996). This is a position from which the leader(s) were able to maintain their power and influence despite not having control of the information or being in control of the higher-level decisions which were affecting their people. As discussed earlier, this reflects a change in methods of
communicating information within the military and within the leader-follower relationship in terms of controlling information flow and consequently, in terms of how trust and influence are maintained in that relationship.

It is difficult to measure how much of this approach was due to the presence of social media and how much was due to the experience level of the leadership team. In fact, the two are so inter-related, it is nearly impossible to separate them. Over the previous decade, the members of the leadership team had been in other leadership roles and had observed what worked and what didn’t. They had also seen (and experienced) the positive and negative impacts media and social media can have on individuals and groups. The Commander, by his personal nature is an open and honest individual who “liked talking with [his] people” and had previous experiences where an open communication strategy had been successful. Thus he was inclined towards an open approach.

The remainder of the leadership team, who were by nature (age, location, etc.) and position closer to the ‘followers’ in the contingent, were in favour of this approach as they had a better understanding of, according to a couple of them “what was going on out there.” They had heard the rumours, they were on Facebook, and they had been asked the questions regarding the withdrawal from the Canadians within their chain of command and by other NATO members at GK. They were members of the social network that existed at GK. They knew the impact this was having on everyone.

Social media and the availability of ‘everything’ on the internet was already a part of how they operated and how they led. The impact on their leadership styles and approaches had already been formed. So, their approach to ‘get in front of it’ and be
open and honest and transparent, resulted in a strengthening of the leader-follower relationship because, as Maitlis (2004) states, “[i]n contemporary conceptualizations, then, power and influence are seen not so much as what one has, but what one does with what one has” (citing Foucault 1980; Knights & McCabe, 1999).

The open and authentic approach to leadership used by the CCNAEWF leadership team was effective in this instance. It is indicative of the open leadership espoused by Li (2010) and reflects an inclusive and aware approach that acknowledges the accessibility of information and its potential impact on a leader’s ability to influence others in a contemporary organization. The success of the open approach used by the leadership team in GK warrants further investigation to empirically determine its applicability in other situations.

1.c. The Perception of Others in the Relationship

Perspective, or the perception of others in a relationship is a key factor in determining the strength of a relationship (Dansereau, Alutto, & Yamarino, 1984). Recall that from the entity perspective, the processes between individuals within a relationship are “centered in individuals’ perceptions and cognitions as they engage in exchanges and influence relationships with one another” (Uhl-Bien, 2006, p. 655), therefore the perceptions of others is a critical measure of a relationship. Measuring perceptions is challenging and problematic due to the subjectivity required to interpret responses and attribute meaning to them in terms that are themselves meaningful and relative to the relationship (Fairhurst & Uhl-Bien, 2012).

Recall that Bresnen (1996) described leadership as a concept that is constructed through the social filters, experiences and cognitive interpretations of the follower. Hall
and Lord (1995) also argue that when considering perceptions of leadership “both affective and cognitive reactions to leaders must be considered” (p. 266). In this case, the affective perceptions had already been formed well before the announcement of the withdrawal. Given the high level of trust expressed by the followers interviewed and the observations of this researcher, it was clear that the initial perceptions of the leadership were positively inclined. Initial perceptions form the basis for determining the strength of the leader-follower relationship (Liden, Wayne, & Stillwell, 1993), which at CCNAEWF was overwhelmingly positive. Thus, to determine / measure their perceptions of the leader-follower relationship during this event, I focused on the cognitive reactions of the followers.

Perceptions may be affected in a number of ways: direct experience, acquiring information, communications with others, and all are influenced by the perceiver’s own mental models (Jones, et al., 2011). Pastor, Meindl, and Mayo (2002) in discussing how social networks affect attribution posit that, “the opinions and beliefs of individual followers regarding their leader are viewed as conditioned by the social systems in which they are embedded” (p. 411). Other research has shown that members of organizations tend to think alike and have similar schemas (Rentsch & Hall, 1994) and this extends to leadership schema (Hogg, 2001). Extending Pratt’s (1998) discourse on social identification, and in concert with Hogg’s (2001) social identity theory of leadership, from my experience in the Air Force, there exists a common perception amongst the members of what constitutes a good leader and good leadership. This is further supported by Karp (2013) when he describes the identities that emerge from social interactions and offers that, “[s]uch identities are the leader and follower roles,
and these are co-created by processes of social interaction” (p. 6). The institutionally accepted leadership schema in the RCAF most likely played a role in establishing the foundations of the leader-follower relationship in CCNAEWF.

Lord and Maher (1991) posit that perceptions of leaders are often influenced indirectly through communications with others. This is particularly applicable in this case because the Canadian Air Force, despite its geographically dispersed footprint, is a relatively well-connected community. The implications of this here are that everyone at GK would have either known, or known of the Commander and the other members of the leadership team before their arrival in GK. Similarly, the leaders would have had prior knowledge of the members at GK. Through communication with others in their social networks, this knowledge would have contributed to the formation of their perceptions of these individuals.

The perceptions of leaders and followers are enhanced or negatively impacted by observed performance outcomes (Hall & Lord, 1995). Leader-follower relationships would be based on the perceptions inferred by these observations and the organizational standards and expectations for performance within the Canadian Air Force. The social identification evident among the contingent members helped reinforce the positive self and group concepts that prevailed in CCNAEWF. Again, the generally strong and positive performance outcomes of the Commander and his leadership team prior to the withdrawal were matched by equally strong performances by the Canadian followers at GK who performed at a consistently high level, often setting the standard for other NATO nations to follow. The result was a mutually respectful and appreciative leader-follower relationship in which the perceptions of each actor were positively
influenced by their observation of the others in action. Observations during the study and anecdotal information collected during my study resoundingly support this conclusion and empirically support the work of Pratt (1998) as well as Kark and colleagues (2003).

In order to determine if social media influenced perceptions and perspectives of the actors within these pre-existing strong, mutually respectful leader-follower relationships, I considered how the strength of these existing ties was impacted. In the course of the interviews and observations, a number of responses provide insight into the cognitive reactions of the actors. Responses such as, “I’d wait for it to come down from the Commander,” “we knew all that, it was laid out for us,” and “they gave us all they could at the time” provide indication of the trust held by the followers in the leadership at CCNAEWF. From a more institutional perspective one respondent offered “there has to be certain level of blind trust, regardless”.

When asked specifically about the level of trust or the strength of their relationship, responses such as, “I’d say it got better,” “it went up, if anything,” and as Moe offered, “it was already strong, but for me personally, I gained more respect for everyone in how they reacted, from the top right on down.” From these responses, it can be reasonably concluded that in this instance, social media, by contributing to the leadership decision to adopt an open and authentic communication strategy had a tangentially positive impact on the perceptions of the actors in the leader-follower relationship.
In general terms, the presence of social media could be perceived as having a positive effect on the leader-follower relationships in this instance. In fact, there is evidence that the mutual respect between the actors was enhanced by their response to not spreading speculation via social media and by the ‘counter-social-media’ approach of face-to-face communication. By enforcing and adhering to the established social media policies of the CF, all players responded ‘as expected’ by the others in the relationship and this consequently enhanced the social identification and the strength of the ties. Additionally, the pervasive ‘fear’ of the potential power of social media to make things worse, may have strengthened the social identification within the group in a common effort to “Finish Proud, Finish Strong.” This result can be interpreted as supporting research by Shamir, et al., (1998) and Shamir, Zakay, Breinin, and Popper (2000) which was extended by Kark, et al., (2003) who state that “leaders who raise followers’ identification with the group increase followers’ willingness to contribute to group objectives” (p. 248).

The Primary Research Question

Thus, I can address the primary Research Question “How is leadership conducted in a social media context?” by considering the entirety of these findings. Overall, it can be said that the impact of social media on the outcomes and relationships during this event was more implicit than explicit. The strength of the leader-follower relationship was not a result of the use of social media as much as it was a response to an awareness of the potentiality of social media. The analysis of the data, including interpretation of responses from the interviews, analysis of the field notes from observations, and an examination of relevant documents, indicates that while social
media presented an additional challenge to managing the message and controlling the flow of information, it was overcome by effective leadership and strong relationships that were extant prior to the announcement of the withdrawal.

The presence and knowledge of social media impacted the information flow by hastening the face-to-face contact by the leadership with the members of the contingent. Similarly, it contributed to the increased open, transparent and frequent flow of information from the leadership team to their followers. Because of the potential negative impacts that social media could have on the message that the leadership team were endeavouring to promote, the Commander modified the policy regarding release of information to ensure the message was clear and aligned with the meaning they were making at the time. Thus, social media changed how information was handled by the leadership because all parties in the relationship had access to the information.

The implicit nature of these impacts derives from the fact that the leadership team were well aware of the potential impacts (positive and negative) that social media can have on a message. This, combined with the existing CF social media policy had already impacted how they led and how they communicated with their people. Thus, when the withdrawal was announced, they did not explicitly address social media; social media was already a part of how they approached and managed communication strategy within their units.

Similarly, the cognitive effects of social media on the perceptions and perspectives of the actors in the leader-follower relationship were more subtle and somewhat surprisingly, more positive than had been anticipated. The culture and
institutional norms of the CF likely contributed to this, as the expectations and mental models of the players had already contributed to establishing a strong relationship between leaders and followers at all levels of the contingent. These strong relationships were, for the most part, enhanced by the common ‘threat’ and potential ‘dangers’ of social media, of which all members (and their families) were aware. The strengthening of the ties in the leader-follower relationships in CCNAEWF was a result of how they handled social media in conjunction with their communication strategy, not a direct result of the use of social media.

Thus, in this instance, leadership and the associated the leader-follower relationships were enhanced by the ‘open’ strategies employed by the leadership team. Social media, by its very existence, influenced the adoption of this open leadership approach and tangentially contributed positively to the outcome. The pre-existing strong leader-follower relationship that existed within CCNAEWF likely skewed the results of this study by enhancing the effectiveness of the open leadership approach taken in this situation. However, it can be concluded that the open communication and information sharing approach effectively negated the potential negative aspects of social media and contributed positively to the perceptions of the actors within the leader-follower relationships within CCNAEWF.

**Conclusions**

The results of the findings offer some implications for extant theories and the development of new or modified approaches to leadership. The introduction of social media to the leadership ‘tool box’ offers challenges and opportunities that require us to
re-examine some proven approaches to leading in contemporary organizations. As many authors (e.g., Kaplan & Haenlein, 2010; Li, 2010; Sievert & Nelke, 2011) have proffered, an open and inclusive communication strategy is now required if a leader expects to remain effective in today’s borderless organizations. The ubiquity and capabilities of social media have altered how information and relationships are handled. The results of this study provide evidence that a more open and inclusive approach can work well. Whether pre-existing strong relational ties between the leader and the follower is a requirement for such a leadership approach to succeed is an area that requires further exploration.

Similarly, managing the message or sensemaking in the face of pervasive information and rich, accessible means to share it becomes a challenge. As Maitlis (2005) and others have indicated, it is no longer a question of having the information, it is more important to understand what an effective leader does with that information. How this differs from the pre-social media era is that now, everyone has access to the information, therefore the leadership cannot parse out bits when and how they deem necessary. Now, leaders must get in front of the information and present themselves as the reliable source, the one to turn to for answers and to make sense of the context within which the information resides. Thus, framing and authenticity become hallmarks of effective leadership. This aligns with previous work by Weick and colleagues (1983, 1995, 2005), Fairhurst and colleagues (1996, 2010, 2014), Maitlis (2004, 2005), Smircich and Morgan (1982) and many others cited here who advocate for leaders as meaning makers through open communication and inclusive leadership. The results gathered here provide empirical support for the work of these authors.

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As this study took place in a military context, it is appropriate to consider the implications of the findings in that environment specifically. Social media represents a new capability from a military perspective – a capability to help and/or harm operations and consequently, personnel. The increasing importance and availability of information to modern military operations has impacted how they are conducted (Albert & Hayes, 2003). In effect, it has distributed and altered decision-making and empowered individuals at all rank levels and in all situations (e.g., Liddy, 2005; Schmidtchen, 2006). Social media offers another means of managing the diverse and asymmetrical information inherent in military operations.

Like the CF and other militaries, the US military has wrestled with the introduction of social media for the past 10 years. Their initial reaction was to ban, or at least severely restrict the use of social media by its members. This generated considerable protest and prompted a review and revision of the initial policies. According to Lawson (2014) this was primarily due to a difference in perspective regarding the term ‘information.’ One perspective views knowledge and information as data, a product or commodity that is transmitted and stored – and consequently is vulnerable to enemy acquisition or exploitation. The other perspective sees information/knowledge as a resource or process for shaping perceptions that, although accessible to the enemy can be used to win the battle for hearts and minds (cf. Mentzas, Apostolou, Young, & Abecker, 2001).

At its roots, this is an example of the divergence between the industrial age institution and the information age organization. The struggle to accept and adapt to decentralized control of information and knowledge involves changing the perceptions
of leadership, control, and power based on exclusive access to information. These paradigms are dysfunctional in the network-based, information age where leadership and power are based on perceptions of the value of your information and your ability to effective share/use that information (cf. Schneider, 2002; Uhl-Bien, Marion, & McKelvey, 2007). This study has shown that shared, open leadership that adopts the process view of information and knowledge for shaping perceptions can be successful in a context that includes social media.

The CF social media policy (see Appendix C) provides some leeway for the use of social media by its members but it is clear that the CF maintains the right to limit access to the internet for reasons of operational security. Proponents for the use of social media advocate that information available via social media and the internet can help the military gain its objectives through improved information sharing, real-time situational awareness, while also engaging all parties involved (military and civilian) for the battle for the hearts and minds. Finding the proper balance between unfettered, open use of social media and tight restrictions is the challenge faced by all militaries. However, most militaries have an 'ace in the hole' – their personnel.

“The complex environments in which soldiers operate require high functioning individuals who are able to adapt and apply their knowledge and experience in a variety of contexts” (O’Toole & Talbot, 2011, p. 44). This sentiment was complemented by George during his interview when he said:

This is what we do – we deal with asymmetric information all the time.

Military members tend to absorb it and reflect on it. They are used to
having abnormal information being passed to them and they are very
good at coping with unusual information.

These statements support the findings of this study that military members have the
capacity and capability to effectively manage social media, with all its potential
advantages and disadvantages. Their training, professionalism and sense of
commitment to their mission and their comrades provide a very high probability that the
misuse of social is unlikely. In this study, the CF members were all mature, experienced
and, as some participants indicated, “high achievers” and “strong performers (that)
understand the agency and corporation better than others.” This likely further mitigated
the risk of misuse of social media in this instance. From this it could be concluded that
the CF and other militaries should consider the capabilities and capacities of their
personnel when determining whether to embrace (rather than restrict) the capabilities of
social media as another ICT tool in their arsenal. It can be a very powerful instrument in
the battle for perceptions and message making – both key elements for effective
leadership.

A leader’s power and influence can no longer generate from control of
information. Social media is here to stay and as Kaplan and Haenlein (2010) advise
“[s]ocial Media will be the locomotive via which the World Wide Web evolves.
Businesses, take note—and don’t miss this train!” (p. 68). For leadership, this means
understanding and using social media to take advantage of its capabilities to enhance
influence – not through control of information but through effective sharing and
interpreting the information openly and inclusively. Work by Li (2010) as well as Kaplan
and Haenlein (2010) offer methods to integrate social media as a part of an effective
communication and leadership strategy. The evidence gathered during this study provides practical evidence that supports their conclusions and recommendations. Further study is warranted to empirically confirm their proposals.

Leaders, by integrating social media into their approach to leadership, can continue to positively influence the affective and cognitive perceptions of their followers. Through effective social media strategies, combined with authentic and open communication, leaders can enhance their relationships with their followers by incorporating social media as a part of their message making. As the use of social media continues to rise, being in front of the message and being part of the social networks enabled by this technology can enhance the image and perception of a leader. But beware; it also has the power to do quite the opposite. The results of this study did not demonstrate the power of using social media. It did, however, demonstrate the importance of understanding social media in today’s contemporary organizations.

**Contribution**

I believe that this study makes a number of empirical contributions that relate primarily to examining leadership, followership, and social media together in a contemporary context. The key contribution of this work is in addressing the gap in the literature. As noted previously, the research looking at the combination of leadership and social media has been sparse and none looked specifically at the relational aspects of leadership as they unfold in a context with social media. This study provides an initial entry to addressing this research gap.

This study also brings together disparate perspectives on leadership and social media from the various disciplines of leadership, organizational development,
psychology, sociology, health care, human relations, information technology, communications and education. The work in these fields adds depth of understanding regarding leadership in particular and is important additions to our understanding of leading in the 21st century as a complex, contextual endeavour (cf. Barkema, Baum, & Mannix, 2002; Osborn, Hunt, & Jauch, 2002).

More specifically, in this study I purposefully focused on leadership within a CF unit because I anticipated that the challenges posed by the introduction of social media into a bureaucratic industrial age institution would be highlighted. The evidence I collected demonstrates that, in this instance, open, inclusive and engaged leadership was required to overcome the potential negative aspects afforded by social media. These findings support the work of Uhl-Bien, Marion, and McKelvey (2007) and their description of adaptive and enabling leadership. It also provides empirical evidence to address the question posed by Uhl-Bien (2006). “How do people work together to define their relationships in a way that generates leadership influence and structuring?” (p. 668). The trust, inclusion and sharing of information helped to define the relationships at CCNAEWF that generated influence, provided structure and presented a way ahead for a unit undergoing significant change. The implicit contribution of social media, through its ever-present potentialities, heightened the need to collaborate and communicate openly and frequently – building the trust and inclusivity that helped define the relationships.

Social media was not used explicitly in this context to help make sense or shape the perceptions of the participants. However, the empirical evidence I gathered in this study provides further support to the importance of congruence between the leader’s
interpretation of the situation and the expectations and perceptions of the followers (Weick, 1995). Followers’ perceptions of the leader(hip) were very much influenced by the congruence of what they expected and what the leader(hip) delivered. In this case, not using social media actually fit their expectations. The open and frequent communication model adopted by the leaders because of the potential impacts of social media also contributed to this congruence.

Thus, the overall contribution of this study lies in its development of our understanding of leadership in a context where social media is a factor. This case provides some insight in to addressing this question and hopefully will act as a catalyst to inspire further research of leadership in contemporary organizations. Social media represents a powerful leadership tool. Its effective use should be incorporated into leadership strategies and approaches in 21st century organizations.

Reflections and Implications for Research

Personal Reflections

This study offered the opportunity to increase my personal understanding of leadership, social media, relationships, and the RCAF. The combination was personally intoxicating. The formative years I spent in the CF/RCAF contributed greatly to my personal growth and I was excited and pleased to learn how the institution has continued to evolve in the face of the rapid technological changes we have experienced over the past decade. I was equally pleased to engage once again with the superb professionals who are the members of our RCAF/CF. They continue to excel and demonstrate a resilience that enables them to succeed wherever and whenever.
Conducting this research enabled me to delve deeply into those aspects of leadership that have intrigued me for many years. Having long viewed leadership as a relational process inexorably connected to the perceptions of those in the relationship, I gained considerable insight into the research and knowledge that supports and refutes this perspective.

It is encouraging to note the general trend in the leadership research that is embracing the relational and processual aspects of this phenomenon. The inclusion and increase of research and researchers from outside of North America is equally encouraging as their perspectives add significantly to our overall understanding of leadership. As the GLOBE studies (2004) revealed, leadership is a worldwide phenomenon that is viewed differently from the various vantage points around the world. Each of these perspectives offers valuable insights and contributes to our understanding of this important relationship. It behoves us to be as equally open and inclusive to sharing information on leadership as the results of this study indicate that it is for leaders to be with the information and followers in their organizations.

The lessons learned have been described earlier and have altered my perceptions of a number of aspects and changed my personal reality. This is as it should be. New knowledge creates new perspectives and forever changes how we view the world. I hope that the findings of this study do just that for those who read it – and for those who continue to study leadership in contemporary settings.

Implications for Further Research

The results of this study offer some intriguing conclusions and open up potential opportunities for further research. From a high-level perspective, it is interesting to note
that while the leadership of CCNAEWF had already adapted their approach to leadership to accommodate the potentialities of social media, it does not seem to be the case in the government examples provided in the opening paragraphs of this report.

The CF was chosen for this study because of their historically closed nature and the close-hold approach to information typified by industrial age, bureaucratic institutions. Yet, during the study it became evident that the leaders had already adapted their approach because of experience with, and exposure to social media. This does not seem to be the case for the governments associated with the political protest movements fueled by social media. It would useful and interesting to explore how leadership and social media interact in other organizations of both ‘stripes’ – industrial and information age. This is an area for potential exploration and future research.

The strong leader-follower relationship that existed prior to the announcement of the withdrawal was a contributing factor to the overall success of the leadership strategy adopted by the CCNAEWF leaders. The open, frequent and authentic information sharing approach strengthened the trust within the relationship. A study to determine if a similar leadership approach would be as successful if the leader-follower relationship was not already strong would provide an interesting counterpoint to this study.

As the use of social media was not a direct factor (implicit vice explicit) in this study, there remains the need to conduct research in an organizational setting where social media is being used to make sense of the environment. Such a scenario would offer considerable potential for significant findings that could illuminate the direct impacts of social media on leadership in a contemporary organization. The employment of a pre-survey regarding social media use would increase the probability of focusing
research on a suitable organization or situation. The results would provide an opportunity to compare and contrast the findings of this study.

The findings this exploratory study do however, lend themselves to generalization and the development of theory that can be applied more widely. The term generalization as it applies to a qualitative study evokes multiple perspectives and opinions. In general, the acceptance of generalizability of qualitative findings is gaining traction and I turn to the recent work of Yin (2016), William (2000), and others to frame this discussion. Yin (2016) discusses analytic generalization where “the aim is not to consider the case ... as a sample of a larger population of like cases” (p. 105). This runs contrary to a positivistic perspective on generalization which does not apply to qualitative research where the identification of patterns, themes and processes is the aim. Analytic generalization uses these aspects of qualitative findings to generate understanding of how, why and when these themes can be transferred to other contexts. Yin sees transferability as a subset or more modest form of generalization.

Williams (2000), in his argument for generalization by interpretivists identifies the feasibility of generalizing qualitative work as what he terms *moderatum* generalization which essentially fills the gap left by empirical, positivistic statistical generalization (quantitative research) and total generalization (physical laws). In *moderatum* generalizations, “certain aspects of S can be seen to be instances of a broader set of recognizable features” (Williams, 2000, p. 215) where S is the phenomenon under study. Popay, Rogers, and Williams (1998) discuss generalizability of qualitative data as a logical inference from the observed phenomena to an established theoretical
perspective. The essence of generalizing qualitative findings rests in the ability to transfer the findings to another context or perspective.

I use the term ‘generalization’ per Kvale (2007) in that it "refers to the extent that findings in one situation can be transferred to other situations" (p. 147). Differing somewhat from traditional generalization, transferability asks the reader to extend the findings of this research to their own experiences or other studies. The findings in this study can be transferred to other situations with similar contexts, and by that I mean organizations where there is an existing social media policy that limits the use of social media to ‘non-operational’ (i.e., non-business related) communication and information sharing. Other military and para-military organizations such as police and emergency services would most likely be the best fit. The similarities of these organizations with the one under study here include hierarchical structure, close monitoring of (social) media activity, strong organizational commitment, and a similar perception of leadership. Other business organizations that have social media policies that limit the use of social media and a high level of inherent organizational citizenship and commitment would also be strong candidates.

The open and inclusive leadership approach that generated success in CCNAEWF is also generalizable in that it served to strengthen the leader-follower relationship. The research on gaining and building trust in relationships (Butler, 1999; Rempel, Holmes, & Zanna, 1985) including the leader-follower relationship (Bass, 1999) clearly describes the importance of this element to the connections and perceptions of the others in the relationship. By adopting their open, frequent and authentic method of communication and information sharing, the leadership at CCNAEWF increased the
reciprocal trust with their people which led to positive organizational outcomes. The presence of social media as a common ‘threat’ to this relationship further strengthened the bond. Given our understanding of leadership as a relationship, it is straightforward to make a claim that this approach would be transferable to other organizations in which social media is a part of the context. As stated, the prerequisite for an existing strong leader-follower relationship is condition that requires for study.

Extending this line of thought to theory development, I refer to Whetten (2001) who states that a key element of theory development includes “how the addition of a new variable significantly alters our understanding of the phenomenon ...” (p. 493). In this instance, the addition of social media alters our understanding of leadership in an industrial age organization (and likely any organization, for that matter). The findings of this study can be applied more widely than in just this case, therefore it is possible to make a contribution to some extant theories of leadership to include social media and other contemporary forms of communication.

The conclusions of this paper connect to theories and research done by a number of authors highlighted earlier. The overall contribution to our understanding of leadership and leadership theory centres on the approach of the CCNAEWF leadership team to overcome the potential impacts of social media as a means of communication within the organization. Their proactive, inclusive and open approach to sharing information combined with frequent and varied means of communication built the trust of their followers and strengthened the leader-follower relationship. This extends the work on distributive (Brown & Gioia, 2002; Gronn, 2002) and shared or team leadership (Pearce & Conger, 2002) and raises questions regarding the communication strategies...
espoused in the industrial age (cf. Jablin, 1979) and how to adapt the work of later authors (e.g., Barrett, 2006; Li, 2010) as they discuss leadership communication in the information age.

Further study to test hypotheses focused on, or generated from these findings is needed. There are a number of findings that offer potential in this regard, but it is important not to consider this research complete. This is merely the start of a larger research program intended to contribute to our overall understanding of leadership in the 21st century context.
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Appendix A – Semi-Structured Interview Instrument

This Appendix provides the final semi-structured interview instrument as used during this study. As described in the paper, this instrument evolved over the course of the study as new information and unanticipated avenues of inquiry emerged during the data collection and iterative analysis process.

**SEMI-STRUCTURED INTERVIEW QUESTIONS – FOLLOWER**

*Numbers in brackets following the question refer to the secondary research questions – 1= Information flow, 2= Power/influence, 3= Participant perceptions. The first five questions of each schedule are stage setting and for contextual reference*

1. Introductory remarks – including context of study, structure and time of interview, voluntary participation (in whole or in part), recording method, and use of responses.
2. Opportunity for questions by the participant
3. How long have you been at NAB Geilenkirchen?
4. Please describe your role/position at NAB Geilenkirchen.
5. In your own words, please describe the leaders/leadership of the Canadian contingent at NAB Geilenkirchen – in terms of structure, communication, power/influence, effectiveness?
6. Tell me about when you first heard about the February 2012 announcement regarding the Canadian withdrawal from the NATO E-3a programme? (Context)
7. How did you first hear about this decision? Leadership? Other? If so – what method/who? And subsequent announcements? The same method or different- how so? What was your reaction? (1)
8. Was social media a method of obtaining and deciphering information regarding the withdrawal? If so, please describe the role social media played in how you gathered information about this issue. (1)
9. Was this consistent throughout the period Feb 2012 through February 2013? Were different methods used to communicate information during this time? If so, please describe what they were and your perception of how effective they were in comparison to social media. (1,3)

10. In your own words, please describe how the leadership provided information regarding the withdrawal. Was this effective? If the leadership used social media, how effective was it? (1)

11. As decisions were made regarding the withdrawal, what was your most reliable source of information? Why? (1,2)

12. Were there instances when the information received via social media contradicted the information provided by the leadership? In your own words, please describe instance(s) when this occurred. What was your reaction? (2,3)

13. Which source did you trust more – social media or the leadership? Why? (2,3)

14. Did this sequence of events affect how you viewed the leader(ship) of the Canadian contingent? If so, please describe how it affected your perception of the leader(ship). (3)

15. Do you have any other comments that you would like to add or any questions for me?

SEMI-STRUCTURED INTERVIEW QUESTIONS - LEADER

1. Introductory remarks – including context of study, structure and time of interview, voluntary participation (in whole or in part), recording method, and use of responses.

2. Opportunity for questions by the participant

3. How long have you been at NAB Geilenkirchen?

4. Please describe your position/role as a leader/leadership of the Canadian contingent at GK.

5. Are you aware of the February 2012 announcement regarding the Canadian withdrawal from the NATO E-3a programme?
6. Please describe how you first heard about this decision. Leadership? Other? If so – who/what? (1)

7. Please describe how you transmitted your knowledge about the withdrawal to your followers. (1)

8. Was social media a method of receiving and transmitting information regarding the withdrawal? If so, please describe the role social media played in this issue. In your opinion, was it effective? Why or why not? (1,2)

9. In your own words, please describe how the followers reacted to the information regarding the withdrawal. (2,3)

10. Were there instances when rumours spread through channels such as social media caused stress and confusion within the contingent? If so, please describe your perception of these situations, including the reasons and your reaction/action to resolve the confusion. (1,2,3)

11. As decisions were made regarding the withdrawal, what was your most reliable source of receiving formation? Why? What was your most effective method of transmitting information? Why? (1,2)

12. Please describe any instances when the information received via social media contradicted the information provided by the leadership? What was your reaction – as a leader? As a follower? (2,3)

13. Which source do you think your followers trusted more – social media or the leadership? Why? (2,3)

14. Did this sequence of events affect how you viewed your followers? If so, please describe how it affected your perception of the followers. (3)

15. Did this affect how you communicated with your followers? If so, please describe how and why? (1,2)

16. Do you have any other comments that you would like to add or any questions for me?
Appendix B – NAEW/CCNAEWF Organizational Structure

The organizational charts below depict the structure of the units and offices in the NATO Airborne Early Warning Force and the Canadian Contingent (CNAEWF) at Geilenkirchen. It provides contextual connections and situates the actors and participants in relative terms within the organization.
CCNAEWF ORGANIZATIONAL CHART

Commander (CO) CCNAEWF

CCNAEWF Chief Warrant Officer (CWO)

CCNAEWF Deputy Commander (DCO)

CCNAEWF Admin O

CO Tech Element

Tech Element MWO

OC Maint Flight

Maint Flight WO

Maint Techs

Tech Flight WO

Technicians

Tech Element DCO

OC Tech Flt

CO Ops Element

OC 1 Squadron

OC 1 Sqn MWO

Tech Element XO

OC 2 Squadron

2 Sqn MWO

OC 2 Sqn MWO

OC 3 Squadron

3 Sqn MWO

OC 3 Sqn MWO

OC Training

Training MWO

Training crew

Flight crew

Flight crew

Flight crew

Flight crew
Appendix C – Canadian Forces Social Media Policy

This Appendix contains the CF Social media policy dated 01 September 2006.

UNCLAS CANFORGEN 136/06 CDS 050/06
SIC SAK
BILINGUAL MESSAGE/MESSAGE BILINGUE
SUBJ: GUIDANCE ON BLOGS AND OTHER INTERNET COMMUNICATIONS – CF OPERATIONS AND ACTIVITIES

B.DAOD 2008-1, 2008-4, AND 2008-6
C.NDSP CHAPTER 30

1. RECENTLY THERE HAS BEEN CONSIDERABLE INFORMATION POSTED TO THE INTERNET DESCRIBING THE EXPERIENCES OF CF MEMBERS, PARTICULARLY THOSE DEPLOYED ON OPERATIONS. THESE POSTINGS HAVE INCLUDED COMMENTARIES ON PERSONAL WEBSITES, WEB-LOGS (BLOGS) AND E-MAILS, AND UPLOADED STILL AND VIDEO IMAGERY. THIS MATERIAL HAS BEEN POSTED BY CF MEMBERS DEPLOYED ON OPERATIONS OR IN GARRISON, FAMILIES AND ACQUAINTANCES OF CF MEMBERS, EMBEDDED JOURNALISTS AND OTHER MEDIA, AND THE GENERAL PUBLIC

2. THIS CANFORGEN IS INTENDED TO ENSURE CF MEMBERS, THE CHAIN OF COMMAND, AND SPECIALIST ADVISORS AT ALL LEVELS ARE AWARE OF THE RISKS INHERENT IN MAKING SOME TYPES OF INFORMATION OR IMAGERY AVAILABLE TO THE WIDE AUDIENCE USING THE INTERNET, AND OF THE MEASURES TO BE TAKEN TO PREVENT SUCH RISKS

3. OPERATIONAL SECURITY IS PARAMOUNT. IT IS INCUMBENT UPON ALL CF MEMBERS TO CONSIDER THE POTENTIAL FOR creating RISK TO THEMSELVES, THEIR FAMILIES, THEIR PEERS, AND THE MISSION BY PUBLISHING INFORMATION TO THE INTERNET. SUCH INFORMATION OR IMAGERY MAY, EITHER INDIVIDUALLY OR IN CONJUNCTION WITH OTHER INFORMATION, PROVIDE EXPERT ANALYSTS INSIGHTS INTO CF CURRENT OPERATIONS, EQUIPMENT, CAPABILITIES, TACTICS, AND INTENTIONS, OR MAY PROVIDE INFORMATION THAT PUTS PERSONNEL IN SPECIALIST ROLES OR THEIR FAMILIES AT RISK

4. CF MEMBERS ARE TO CONSULT WITH THEIR CHAIN OF COMMAND BEFORE PUBLISHING CF-RELATED INFORMATION AND IMAGERY TO THE INTERNET, REGARDLESS OF HOW INNOCUOUS THE INFORMATION MAY SEEM. THE CHAIN OF COMMAND HAS ACCESS TO EXPERT ADVISORS, SUCH AS PUBLIC AFFAIRS AND INTELLIGENCE STAFFS, WHO WILL ENSURE THAT SUCH PUBLISHED
INFORMATION IS NOT ULTIMATELY PREJUDICIAL TO CF OPERATIONS AND PERSONNEL

5. CF MEMBERS ALSO HAVE A RESPONSIBILITY TO ENSURE THAT ANY INFORMATION OR IMAGERY THEY SHARE WITH A THIRD PARTY WHO MAY NOT SHARE CF OPERATIONAL SECURITY CONCERNS IS NOT OF SUCH A NATURE THAT IT COULD CREATE RISKS IF PUBLISHED

6. COLLECTION OF INFORMATION OR IMAGERY BY EMBEDDED JOURNALISTS OR OTHER MEDIA IS SUBJECT TO AGREEMENTS BETWEEN SUCH MEDIA AND THE RESPONSIBLE PUBLIC AFFAIRS STAFF, WHO WILL ENSURE THE APPROPRIATE MANAGEMENT AND RELEASE OF INFORMATION

7. IT IS NOT THE INTENT OF THE CF TO RESTRICT THE INTERNET ACCESS PROVIDED TO CF MEMBERS AS DESCRIBED IN THE REFERENCES. WITHIN GENERALLY WELL-UNDERSTOOD LIMITS, CF MEMBERS ARE ENTITLED TO COMMUNICATE WITH FRIENDS, FAMILY AND COLLEAGUES, AS ARE ALL CANADIAN CITIZENS

8. THE CF CHAIN OF COMMAND, PARTICULARLY IN A THEATRE OF OPERATIONS, HAS THE AUTHORITY TO RESTRICT ACCESS TO THE INTERNET IF IT IS DEEMED ESSENTIAL TO MAINTAINING OPERATIONAL SECURITY

9. LEGAL ADVICE ON THIS CANFORGEN IS AVAILABLE TO THE CHAIN OF COMMAND FROM THE NATIONAL SECURITY DIRECTORATE OF THE CF LEGAL ADVISOR (CFLA)

   A. QR&O 19.14 (Improper Comments)
   B. QR&O 19.36 (Disclosure of Information or Opinion)
   C. DAOD 7023-1 (Defence Ethics Program)
   D. DAOD 6002-7 (Internal Use of Social Media Technologies)

While reference D, DAOD 6002-7, speaks to the policy on the Internal Use of Social Media Technologies and dictates how an individual may use social media as part of their daily work, References A through C speak to an individual’s responsibilities under the Queen’s Regulations and Orders (QR&O) regarding an individuals’ right to divulge their personal opinion and rules pertaining to the disclosure of information. These references are based on regulations under the National Defence Act (NDA) and
contravention of these orders whether while on or off duty could result in disciplinary measures.
Appendix D – Description of Participants

The table below provides some contextual features and descriptions of the participants in this study. It provides some background and situational details to enhance understanding of the perspectives provided by the participants during the semi-structured interviews.

<table>
<thead>
<tr>
<th>PSEUDONYM</th>
<th>ROLE AND BACKGROUND</th>
<th>WING at GK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abe</td>
<td>Air Weapons Controller Junior Officer, ex-NCO</td>
<td>Operations</td>
</tr>
<tr>
<td>Bill</td>
<td>IT Specialist, Junior Officer</td>
<td>Information Technology (IT)</td>
</tr>
<tr>
<td>Chuck</td>
<td>Pilot, Senior Officer</td>
<td>Operations</td>
</tr>
<tr>
<td>Dick</td>
<td>Avionics Systems Technician, NCO</td>
<td>Logistics</td>
</tr>
<tr>
<td>Ed</td>
<td>Security Specialist, NCM</td>
<td>Logistics</td>
</tr>
<tr>
<td>Frank</td>
<td>Tactical Director, Senior Officer</td>
<td>Operations / Admin</td>
</tr>
<tr>
<td>George</td>
<td>Tactical Director, Senior Officer</td>
<td>Operations / Admin</td>
</tr>
<tr>
<td>Harry</td>
<td>Pilot, Senior Officer</td>
<td>Training</td>
</tr>
<tr>
<td>Ivan</td>
<td>Senior Technician, Senior NCO</td>
<td>IT</td>
</tr>
<tr>
<td>Joe</td>
<td>IT Director, Senior Officer IT (Snr O – Tech – Ldr)</td>
<td>IT</td>
</tr>
<tr>
<td>Karl</td>
<td>Pilot, Junior Officer</td>
<td>Training</td>
</tr>
<tr>
<td>Liam</td>
<td>Tactical Director, Senior Officer</td>
<td>Training</td>
</tr>
<tr>
<td>Moe</td>
<td>Administrator, Senior Officer</td>
<td>Logistics</td>
</tr>
<tr>
<td>Neil</td>
<td>Security Supervisor, Junior Officer</td>
<td>Logistics</td>
</tr>
<tr>
<td>Oscar</td>
<td>Training Systems specialist, NCM</td>
<td>Training</td>
</tr>
</tbody>
</table>
Appendix E – Canadian Forces Research Policy Statement DAOD 5062-0

DAOD 5062-0, Social Science Research

1. Introduction

Date of Issue: 2014-06-18

Application: This DAOD is a directive that applies to employees of the Department of National Defence (DND employees) and an order that applies to officers and non-commissioned members of the Canadian Forces (CF members).

Supersession: CFAO 8-3, Civilian Requests for Sociological/Psychological Research Assistance

Approval Authority: Chief of Military Personnel (CMP)

Enquiries: Director General Military Personnel Research and Analysis (DGMPRA)

2. Policy Direction

Context

2.1 The DND and the CF recognize the need to understand human behaviour, and the opinions and attitudes that shape it, by conducting social science research in order to:
   a. respond to operational priorities;
   b. optimize organizational effectiveness; and
   c. develop policies, strategies and operational doctrine for DND employees, CF members and their families, and members of the cadet organizations, and to ensure the maintenance of their well-being.

2.2 Social science research consists of the use of scientific logic or systematic methods, procedures and techniques to guide research on issues normally associated with fields of study such as psychology, sociology, economics, business administration, political science or any other academic discipline that uses these methods. Social science research offers impartial, systematic and reliable methods to acquire an understanding of human behaviour through the study of a wide variety of human issues in organizations. Research techniques include mailed and electronic questionnaires and surveys, focus groups, individual interviews and participant observation. Social science research does not include medical science, health surveillance, public health research or health programme quality assurance.
2.3 Social science research has an organizational perspective, which differs from a natural or applied science approach. Social science research includes studies of knowledge, skills, aptitudes, attitudes, personalities, behaviours and other psychological or sociological phenomena. Social science research may involve quantitative studies of human phenomena and their relationships, with the objective to develop a mathematical model to test theories. It may also involve qualitative research, which entails the examination, analysis and interpretation of observations for the purpose of discovering underlying meanings and patterns of relationships.

2.4 The completion of social science research is a core element in some academic programmes in which DND employees or CF members are engaged for professional development.

2.5 For purposes of the DAOD 5062 series, social science research participants are limited to DND employees, CF members and their family members, CF applicants and members of cadet organizations.

2.6 Clinical psychology research, such as might inform the diagnosis, classification or treatment of mental disorders and aberrant, maladaptive or abnormal behaviours, and research related to the promotion, protection and restoration of health, are addressed in the DAOD 5061 series.

Policy Statement

2.7 The DND and the CF must conform to the requirements of the Treasury Board Communications Policy of the Government of Canada, and are committed to the conduct of social science research of the highest standards, which entails the rigorous screening and coordination of any proposed research to ensure that it:
   a. conforms to DND and CF organizational aims and policies;
   b. demonstrates value to the DND, the CF and the level one advisor (L1 advisor) organization in which the research is to be conducted;
   c. does not conflict or otherwise interfere with higher priority efforts within the DND, the CF or applicable L1 advisor organization;
   d. does not compromise operational security or the safety of DND employees or CF members;
   e. is conducted in accordance with accepted professional practices and is of sufficiently high quality so as to result in reliable, accurate and valid findings;
   f. is in keeping with the DND and the CF commitment to respect the rights of DND employees, CF members and their family members, applicants for enrolment in the CF and members of cadet organizations, including the protection of their privacy and personal information; and
   g. does not contribute to incidences of refusal to participate because of survey fatigue.

Requirements

2.8 The DND and the CF must:
   a. establish procedures for a Social Science Research Review Board (SSRRRB) to ensure the proper review and conduct of social science research;
   b. provide education and training in the DND and the CF related to social science research; and
   c. designate a personnel research advisor for each L1 advisor to ensure awareness of and assist in the coordination and approval of social science research projects in their organization.

2.9 The SSRRRB Chair must notify the CMP of any non-compliance with this DAOD.
3. Consequences

Consequences of Non-Compliance
3.1 Non-compliance with this DAOD may have consequences for both the DND and the CF as institutions, and for DND employees and CF members as individuals. Suspected non-compliance will be investigated. The nature and severity of the consequences resulting from actual non-compliance will be commensurate with the circumstances of the non-compliance. Note – In respect of the compliance of DND employees, see the Treasury Board Framework for the Management of Compliance for additional information.

4. Authorities

Authority Table
4.1 The following table identifies the authorities associated with this DAOD:

<table>
<thead>
<tr>
<th>The</th>
<th>has or have the authority to … …</th>
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<tbody>
<tr>
<td>L1 advisors</td>
<td>□ designate a personnel research advisor for their organization;</td>
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<tr>
<td></td>
<td>□ accept or reject requests to sponsor social science research projects related to their assigned functional areas; and</td>
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<td></td>
<td>□ grant or refuse permission for researchers to approach or solicit the participation of targeted research participants.</td>
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<tr>
<td>CMP</td>
<td>□ approve procedures for social science research within the DND and the CF;</td>
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<td>□ consider and determine applications for the reconsideration of SSRRB decisions; and</td>
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<td></td>
<td>□ take appropriate action in respect of non-compliance with the DAOD 5062 series.</td>
</tr>
<tr>
<td>ADM(PA)</td>
<td>• oversee the planning, conduct and coordination of the public opinion research activities of the DND and the CF (see policy requirement 8 of the Communications Policy of the Government of Canada for the meaning of “public opinion research”);</td>
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<td>• obtain the approval of the Minister of National Defence for the annual public opinion research plan; and</td>
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<td>• implement the procedures for the planning and contracting of public opinion research.</td>
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<tr>
<td>DGMPRA</td>
<td>□ establish and approve the terms of reference for the SSRRB, and appoint its members;</td>
</tr>
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<td>□ approve the SSRRB standard operating procedures for the conduct of reviews;</td>
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</tbody>
</table>
approve the protocols, including the design and conduct, of
social science research projects proposed for conduct in the
DND and the CF; and
co-ordinate the scheduling of social science research projects.

5. References
Acts, Regulations, Central Agency Policies and Policy DAOD
- Framework for the Management of Compliance, Treasury Board
- Communications Policy of the Government of Canada, Treasury Board
- Contracting Policy, Treasury Board

Other References
- DAOD 2008-2, Media Relations and Public Announcements
- DAOD 5002-5, Canadian Forces Personnel Selection
- DAOD 5061-0, Research Involving Human Subjects
- DAOD 5061-1, Research Involving Human Subjects – Approval Procedures
- DAOD 5062-1, Conduct of Social Science Research
- Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans, Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, and Social Sciences and Humanities Research Council of Canada
- Social Science Research Review Board Standard Operating Procedures
Appendix F – Voluntary Consent Form

The following Consent Form was used with participants during this study.

CONSENT TO PARTICIPATE IN RESEARCH

*Linking Leadership and Social media: Assessing the way that social media affects the leader-follower relationship*

You are asked to participate in a research study conducted by Gary Szczerbaniwicz, a PhD candidate from the College of Management and Economics at the University of Guelph. He is currently the A5 in the Component Headquarters at NAB Geilenkirchen. This study will provide data in support of his PhD dissertation.

If you have any questions or concerns about the research, please feel free to contact Dr. Michele Bowring, Assistant Professor, Dept. of Business, College of Management and Economics, University of Guelph, Guelph, Ontario, Canada, N1G 2W1, (519) 824-4120 Ext 52292, mbowring@uoguelph.ca

**PURPOSE OF THE STUDY**

This research project will investigate the impact of the introduction of social media into the contemporary organization. Focusing on the leader-follower relationship, it considers important aspects of the daily connections present in 21st century firms. This study will consist of a collection of interviews designed to collect data regarding the information flow and exchange centred on the announcement of the Canadian withdrawal from the NATO Airborne Early Warning and Control (NAEW&C) programme. It will seek to determine the role that social media played in the dissemination of information and the formation of understanding regarding the withdrawal. The aim of the study is to assess the ways that social media affect the leader-follower relationships in the Canadian contingent at NAB Geilenkirchen.
PROCEDURES
If you volunteer to participate in this study, we would ask you to do the following things:

Indicate your willingness to participate by responding to the initial e-mail.

Meet with the researcher and spend approximately one hour in an interview where you will be expected to provide your perceptions and recollection of the events associated with the Canadian withdrawal from the NAEW&C Programme.

Be available for follow-on interview, if required.

Review interview transcript upon completion (if desired).

POTENTIAL RISKS AND DISCOMFORTS
It is intended that your participation in this study will not involve any personal risk to you. The Canadian contingent Commander is aware of, and supports this study, however, your choice to participate will remain completely confidential and will only be known to the researcher. In order to minimize any potential for unintended harm, all activity associated with this study will be conducted in a discrete manner at a location and time of your choosing. All information collected during the study will be handled with the utmost care and confidentiality. No information will be attributable to you personally and all data will be kept in a secure location (e.g., encrypted computer or personal safe) accessible only by the researcher. There should be no stigma attached with participating in this study, however should that occur, participation will immediately stop and all necessary actions will be taken to remove any unintended consequences associated with participating.

POTENTIAL BENEFITS TO PARTICIPANTS AND/OR TO SOCIETY
The intention of this study is to assess the ways that the use of social media as a communication, information and relational tool affects the relationships between leaders and followers. By increasing our understanding of the impact of social media on the leader-follower relationship, the researcher hopes to add to the academic and practical knowledge of how social media impacts contemporary organizations. This research will add to the overall body of knowledge of leadership, organizations, social media, and personal and professional relationships.

PAYMENT FOR PARTICIPATION
There will be no payment for participation in this study.
CONFIDENTIALITY

Every effort will be made to ensure confidentiality of any identifying information that is obtained in connection with this study. The data received from respondents will be handled in such a way as to ensure confidentiality of the information and participation. Interviewee names will not be directly referred to in any analysis or writings, but instead an index file uniquely identifying each interview participant with an associated code name will be referenced within all text. This index file will be stored on a password protected, encrypted folder on a physically secured computer. The identities of participants will be kept confidential through the use of code words and pseudonyms. No information will be directly connected with any informant at any time. Information gathered during the interviews will not be shared or disseminated without the prior consent of the participants and even then, it will be general in nature and non-attributable to a specific individual. Prior to publishing the findings, all participants will have the opportunity to review the transcripts of their interview (within the next six months) and elect to have their contribution modified or removed if they so wish. Data will be held for the duration of the study and retained until completion of the associated PhD (or December 2017 whichever occurs first). When the researcher is advised by University authorities that the information is no longer required in support of the PhD work, the information will be destroyed or deleted permanently.

DUTY TO REPORT

The researcher has a duty to report any illegal activities and/or misconduct in the Canadian Armed Forces.

PARTICIPATION AND WITHDRAWAL

You can choose whether to be in this study or not. If you volunteer to be in this study, you may withdraw at any time without consequences of any kind. You may exercise the option of removing your data from the study. You may also refuse to answer any questions you don’t want to answer and still remain in the study. The investigator may withdraw you from this research if circumstances arise that warrant doing so.

RIGHTS OF RESEARCH PARTICIPANTS

You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study. This study has been reviewed and received ethics clearance through the University of Guelph Research Ethics Board. If you have questions regarding your rights as a research participant, contact:

Director, Research Ethics  Telephone: (519) 824-4120, ext. 56606
University of Guelph  E-mail: sauld@uoguelph.ca
437 University Centre  Fax: (519) 821-5236
SIGNATURE OF RESEARCH PARTICIPANT/LEGAL REPRESENTATIVE
I have read the information provided for the study “Linking Leadership and Social media: Assessing the way that social media affects the leader-follower relationship” as described herein. My questions have been answered to my satisfaction, and I agree to participate in this study. I have been given a copy of this form.

__________________________________
Name of Participant (please print)

__________________________________
Signature of Participant Date

SIGNATURE OF WITNESS

__________________________________
Name of Witness (please print)

__________________________________
Signature of Witness Date

[The witness is ideally NOT the investigator, but if there is no readily available alternative, the investigator can act as witness.]
Appendix G – Sequence of Events – Canadian Withdrawal from NAEW&CF

This Appendix provides a description of the sequence of events as they pertain to the withdrawal of Canadian Forces from Geilenkirchen. It offers contextual background to enable a better understanding of the timing and decisions that affected the participants under study.

<table>
<thead>
<tr>
<th>EVENT</th>
<th>DATE</th>
<th>ACTIVITY</th>
<th>REMARKS</th>
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<tbody>
<tr>
<td>1.</td>
<td>May 2011</td>
<td>Canadian Defence Minister (or his aide) informally or inadvertently reveals to NATO that Canada will be withdrawing from the NATO AEW&amp;C Force.</td>
<td>The story is picked up by CBC and broadcast on their hourly news – which is re-transmitted via CFN to the NATO &amp; Canadian community in and around Geilenkirchen.</td>
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<td>2.</td>
<td>Late May 2011</td>
<td>PM Harper sends letter to NATO Secretary General formally advising NATO that Canada will withdraw from the NAEW&amp;CF.</td>
<td>Copy of the letter informally received in Geilenkirchen by the Commander CCNAEWF via the Italian contingent at GK.</td>
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<td>3.</td>
<td>End-July / Early Aug 2011</td>
<td>First formal announcement of withdrawal to the CF personnel at Geilenkirchen</td>
<td>Commander CCNAEWF summons all members to a “Commander’s Call”. Confusion regarding veracity, timelines, etc. Start of the message making process.</td>
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<td>4.</td>
<td>Sept 2011</td>
<td>NAEW&amp;CF semi-annual Board of Directors (BOD) meeting</td>
<td>Canada officially announces to the other members of the BOD that they will be withdrawing and will no longer contribute to the modernization budget effective</td>
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<td>5.</td>
<td>Late Sept 2011</td>
<td>Second Commander’s call by Commander CCNAEWF</td>
<td>To confirm withdrawal and to begin formal planning. Message making becomes paramount for leadership. Commander’s Calls are supplemented by monthly barbeques and other social events where the leadership take the opportunity to update the personnel and their families. This occurs on a regular basis throughout the withdrawal.</td>
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<td>6.</td>
<td>Fall 2011/Winter 2012</td>
<td>Development and approval of phased withdrawal plan</td>
<td>Plan developed in conjunction with input from all participants. Initially 33% per year, later modified to 30-40-30 over the coming three years, 2012-2014.</td>
</tr>
<tr>
<td>7.</td>
<td>Feb 2012</td>
<td>NAEW&amp;CF semi-annual Board of Directors (BOD) meeting</td>
<td>Canada formally provides the requisite 12-months notice to withdraw from the program. Will cease any monetary contribution to the NAEW&amp;CF budget as of Feb 2013.</td>
</tr>
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<td>8.</td>
<td>Summer 2012</td>
<td>First tranche of phased withdrawal plan is executed.</td>
<td>The Annual Posting Season (APS) occurs May – Aug each year, when &gt;90% of all moves occur in the CF. 30% of CCNAEWF personnel depart Geilenkirchen.</td>
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<td>9.</td>
<td>Sept 2012</td>
<td>NAEW&amp;CF semi-annual Board of Directors (BOD) meeting</td>
<td>Concern expressed by other BOD members about Canada’s active participation in operations once</td>
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<td>10.</td>
<td>Dec 2012</td>
<td>Decision on Canada’s operational participation delayed (date unknown)</td>
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<td>Considerable concern and confusion ensues within the NATO and Canadian communities at GK. Contingency plans are discussed at NATO and within CCNAEWF.</td>
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<td>11.</td>
<td>Feb 2013</td>
<td>Canada ceases its monetary contribution to the NAEW&amp;CF budget.</td>
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<td>Canada continues its participation in the NAEW&amp;CF according to the agreed phased withdrawal plan. Canada is allowed to continue operational role until final withdrawal in August 2014.</td>
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<td>12.</td>
<td>Aug 2014</td>
<td>Last Canadian military personnel leave GK</td>
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<td></td>
<td>Canadian withdrawal from NAEW&amp;CF is completed.</td>
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