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Contextual leadership: A systematic review of how contextual factors shape leadership and its outcomes

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Introduction

The very early systematic research on leadership in the early 20th century employed a heavily leader-centric approach and largely focused on searching for specific universal traits and behavioral styles that make some leaders more effective than others (Day, 2014; Lord, Day, Zaccaro, Avolio, & Eagly, 2017). However, a failure to find such universal traits or behaviors led leadership researchers to pay more attention to the situation or context in which leaders function. Fiedler (1978) was the first to advocate that leadership does not occur in a vacuum and that to obtain better group performance outcomes, there must be a match between a leader's trait and the situational factors (e.g., task structure). Other contingency theories examining the role of context in leadership followed suit (e.g., House & Mitchell, 1974; Vroom & Yetton, 1973). Although this line of research sparked significant interest for a decade, the focus on contingency theories dropped dramatically as other prominent new-age leadership theories (e.g., transformational and charismatic leadership) began to dominate the field (Day & Antonakis, 2012).

After decades-long, frequently repeated appeals for greater consideration of organizational context in many areas of management research (e.g., Johns, 2006; Rousseau & Fried, 2001), the theoretical and empirical leadership literature is once again devoting considerable attention to how contextual factors might influence leadership and its outcomes (e.g., Ayman & Adams, 2012; Hannah, Uhl-Bien, Avolio, & Cavaretta, 2009; Osborn, Hunt, & Jauch, 2002; Porter & McLaughlin, 2006). The so-called contextual leadership research, a fairly broad area of leadership research, examines whether situational or contextual factors lessen or enhance the impact of leadership practices and explores how leadership takes place in specific contextual settings (e.g., military, educational; Day & Antonakis, 2012; Liden & Antonakis, 2009).

Presently, contextual leadership is one of the most trending topics in leadership research (Dinh et al., 2014; Gardner, Lowe, Moss, Mahoney, & Cogliser, 2010). However, there appears to be neither a systematic approach to nor agreement regarding what constitutes the context for leadership (Ayman & Adams, 2012). Such lack of agreement has also been problematic for prominent leadership theories. For instance, transformational leadership theory began without paying much

attention to contextual contingencies, and only the most recent formulations of the theory include several contextual factors in an effort to provide a more complete understanding of the relationship between transformational leadership and performance (Avolio, 2007). As Avolio (2007, p. 27) asked, “should this theory [transformational leadership], like others in leadership, have started with a more integrative focus that included a broader array of potential contingencies?” In attempting to answer this and other relevant questions, an underlying premise of this review is that knowledge and insight about the influence of context on leadership and its outcomes will develop in a more systematic and structured manner when that research progresses according to a theory-driven framework. This review will also integrate relevant work from a diverse cross-section of literature (e.g., institutional theory of leadership, political leadership) to identify empirical and theoretical gaps and suggest future research directions.

To set the stage, I will first introduce and employ the categorical framework that Johns (2006) developed in his seminal work and adapt it to define and fully portray leadership's context, as this framework provides a broad but systematic understanding of how contextual factors that shape human behavior can be categorized and how the effect of such factors can be studied in organizational research. Next, using this framework, I will briefly discuss how context is historically treated in different pockets of leadership research, including most prominent contingency models of leadership, implicit leadership theories, new-age leadership models, and validity generalization in leadership research. I will then review and discuss the theoretical frameworks that have been employed and the variables that are included to explain how contextual factors shape the leadership process and its outcomes or moderate between these. In doing so, I will consider “what context does” to leadership (Johns, 2006, p. 395). Specifically, I will discuss how context impacts leadership in terms of whether context restricts its range, influences base rates, changes the nature of examined relationships, generates curvilinear effects, or threatens the generalizability of findings about leadership. Finally, I will reconcile discrepant findings, identify important gaps in the literature, and discuss how leadership researchers may benefit from considering these and other gaps in the literature to produce a more comprehensive body of research on contextual leadership.

In conducting this review, I used a number of databases (e.g.,

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Business Source Complete, PsycARTICLES) and search engines (e.g., Google Scholar) and in general prioritized top-tier organizational behavior journals in my search (e.g., *Academy of Management Journal*, *Journal of Applied Psychology*, *Personnel Psychology*, *The Leadership Quarterly*). I also included only those articles that have either explored the relationship of contextual factors to the leadership process (i.e., leader, follower(s), and leader-follower dyad) and its outcomes (i.e., effectiveness, cognition, attitude, and behavior; adopted from Hiller, DeChurch, Murase, & Doty, 2011) or treated contextual factors as a moderating factor of the relationship between the leadership process and leadership outcomes. For the purposes of this review, the relationship between the leadership process and outcomes as well as among contextual factors, and the ways in which leadership influences the context, are considered beyond its scope. The articles reviewed are representative of the research within each domain rather than exhaustive.

Johns's (2006) categorical framework for context

Of course, given the magnitude of the literature on contextual leadership, several review articles and special issues on contextual leadership exist, and they are important as they have discussed which contextual factors should be considered as relevant for the leadership context. For instance, based on a number of relevant sources for leadership research, Porter and McLaughlin (2006) proposed seven components of the organizational context: *culture/climate*, *goals/purposes*, *people/composition*, *processes*, *state/condition*, *structure*, and *time*. In contrast, Liden and Antonakis (2009) additionally considered *social networks* to be part of the leadership context, while Ayman and Adams (2012) conceptualized it as the *cultural* (e.g., visible and invisible indices of culture) and *organizational* (e.g., physical conditions) contexts of leadership and thus focused on a smaller subset of factors. Perhaps due to the fast pace at which this research has grown (Dinh et al., 2014), our knowledge regarding contextual leadership is still somewhat unformed and, as in other fields of leadership research, there are “no dominant paradigms for studying it, and little agreement about the best strategies for developing and exercising it” (Hackman & Wageman, 2007, p. 43). In attempting to address this, I employ the categorical framework developed in Johns's (2006) seminal work and adapt it to define and fully portray the leadership context.

Johns (2006) presented a categorical framework for context that can be employed to broadly formulate the effect of contextual factors on organizational behavior. Specifically, he conceptualized context at two different levels: 1) the *omnibus context* and 2) the *discrete context*. The omnibus context involves a broad consideration of contextual or environmental influences—it is “an entity that comprises many features or particulars” (Johns, 2006, p. 391)—and answers simple questions about the context of interest (i.e., *what*, *why*, *who*, *where*, and *when*). In other words, the omnibus context provides necessary information concerning the elements of a given context. Johns (2006) further assumed that omnibus context effects should operate uniformly and that the findings of a study should therefore change when one switches from one omnibus context to another to examine the same relationship. For example, an omnibus approach to context will include studies that examine the top-down effects of societal trends, economic conditions, national culture, or other macro-level factors.

In contrast, the discrete context, defined as “specific situational variables that influence behavior directly or moderate relationships between variables” (Johns, 2006, p. 393), involves a narrower consideration of specific contextual influences and includes the *task*, *social*, and *physical* context as its salient dimensions. However, consistent with existing research on teams (e.g., Bell & Marentette, 2011; Marks, Mathieu, & Zaccaro, 2001) and previous work on contextual leadership (e.g., Hannah et al., 2009; Porter & McLaughlin, 2006), the temporal context can be also considered as an additional dimension of the discrete leadership context.

Furthermore, one can think of discrete contexts as being in a way nested within omnibus contexts. In parallel, discrete contextual factors are expected to mediate the effects of omnibus contextual factors, or both discrete and omnibus contextual factors will interact to predict the outcome variable of interest (Johns, 2006). For instance, the discrete context is examined when a researcher is interested in whether the nature of a relationship would change if the participants found themselves in one particular physical environment rather than another.

Considering the role assigned to context in earlier leadership research, Johns's (2006) categorical framework could provide the leadership researcher with a much-needed taxonomy of the context in which leadership takes place and explain how contextual factors shape the leadership process and its resultant outcomes, for at least two reasons. First, Johns's (2006) categorical framework for context has already been used in other areas of organizational behavior research. For instance, Dierdorff, Rubin, and Morgeson (2009) employed this categorical model to explore the extent to which managerial roles differ across the different contexts where these roles are actually performed. Other research has adopted elements of Johns's framework to fully describe the contexts of extreme teams (Bell, Fisher, Brown, & Mann, 2016) and social media contexts (McFarland & Ployhart, 2015) and their effects on a wide range of outcomes. Second, Johns's (2006) conceptualization of context coincides with multilevel theorizing and principles. Specifically, conceptualizing context in a nested manner, with the discrete context subsumed within the omnibus context, will help leadership researchers to better identify the ways in which top-down effects occur and to portray leadership as a multilevel system. This is important because one should expect the discrete context to have a greater influence on leadership and its outcomes than the omnibus context, as one would expect the discrete context to have stronger interactions with leadership (Simon & A., 1973). Such a multilevel approach is also consistent with recent streams of leadership research that argue that “leadership is multi-level, processual, contextual and interactive” (Uhl-Bien & Marion, 2009, p. 631). Fig. 1 provides an overview of the contextual framework.

Historical treatment of context in leadership research

Beginning with the contingency models of leadership, context has been included in almost every definition of leadership. Leadership, defined as an influencing process—along with its resultant outcomes—that takes place between leaders and followers to achieve a common or shared goal (Achua & Lussier, 2007), is frequently explained by the leader's individual-specific characteristics and behaviors, the followers' perceptions and attributions regarding the leader and leadership, and importantly, “the context in which the influencing process occurs” (Day & Antonakis, 2012, p. 5). Hence, context appears to be one of three major components that define leadership (Bass, 2008).

Furthermore, context has been important in leadership research because it can influence the type of leadership that emerges and is effective (Liden & Antonakis, 2009). That is, contextual factors can weaken the explanatory power of dispositional determinants of leader behavior for the emergence of leadership and its effectiveness (Sternberg & Vroom, 2002). In recognition of this, contextual factors have been theorized as either an explanatory or a moderating variable in some pockets of the leadership literature (i.e., contingency models of leadership, substitutes for leadership, implicit leadership theories, and new-age leadership models). Before I review the important theoretical rationale and empirical findings for the effects of omnibus and discrete contexts of leadership using Johns's (2006) framework, I hope that the following sections will make it clear that this theoretical appreciation of the importance of context in leadership research can help us better understand the role given to context in leadership research.

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