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## Overcoming Community Resistance to Change via the Use of Transformational Leadership by General Managers of Southern California's Coachella Valley Gated Golfing Communities

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Overcoming Community Resistance to Change via the Use of Transformational  
Leadership by General Managers of Southern California's Coachella Valley  
Gated Golfing Communities

A Dissertation by  
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Brandman University  
Irvine, California  
School of Education

Submitted in partial fulfillment of the requirements for the degree of  
Doctor of Education in Organizational Leadership

March 2018

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Overcoming Community Resistance to Change via the Use of Transformational  
Leadership by General Managers of Southern California's Coachella Valley

Gated Golfing Communities

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## ACKNOWLEDGEMENTS

*“My job is to work myself out of a job!”*

—CAPT Rinda K. Ranch-Hillis, USN (RET)

The U.S. Navy once had an advertising slogan that stated, *“It’s not just a job. It’s an adventure.”* Well, the past 2.5 years have certainly been an inspirational adventure that wouldn’t have been possible if not for the myriad efforts of the Brandman University Ed.D. team, faculty, cohort mentors, and my fellow Palm Desert cohort members. The breadth of knowledge, selfless support, mentoring, and friendship throughout the program has been truly inspiring. A heartfelt thank you to each and every one of you. Most especially my dissertation partner, Sharon Kalkoske, who had to respond to my countless texts asking about proper grammar usage. It certainly doesn’t hurt to have an English teacher as your dissertation partner!

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Finally, to quote Ayn Rand, "Who is John Galt?"

## ABSTRACT

### Overcoming Community Resistance to Change via the Use of Transformational Leadership by General Managers of Southern California's Coachella Valley Gated Golfing Communities

by Shaun A. Hillis

**Purpose:** The purpose of this qualitative case study was to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary purpose was to explore and describe generational cohorts' resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley.

**Methodology:** This study utilized a qualitative case study research design comprised of semistructured open-ended interview questions to solicit and capture rich qualitative data regarding the use of transformational leadership traits while overcoming resistance to change involving community change initiatives. The population for the study consisted of general managers of Southern California's Coachella Valley gated golfing communities.

**Findings:** The findings from this study suggest that transformational leadership is an efficacious leadership paradigm to overcome community resistance to change. Additionally, this study found that the homeowners' association board of directors is influential in overcoming community resistance to change. Finally, this study found that changes in generational cohorts represent an area of concern for gated golfing communities that needs to be addressed to ensure the economic continuity of a given community.

**Conclusions:** The findings from this study led the researcher to conclude that transformational leadership is an efficacious means to overcome resistance to change to address changing generational cohort demographics within gated golfing communities. Utilizing transformational leadership, gated golfing communities are able to effect needed community change to ensure community economic viability.

**Recommendations:** The research should be replicated in other regions of the United States with a larger sample size. Another recommendation is to replicate this study within differing community structures to ascertain if differing levels of resistance to change exist in gated nongolfing communities compared to gated golfing communities. Finally, the researcher recommends that a study be conducted to evaluate the role and efficacy of emotional intelligence in overcoming resistance to change within the Generation X and millennial generational cohorts.



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## CHAPTER I: INTRODUCTION

Leadership is what ordinary people use to bring forth the best from themselves and others. (Cichy, Cha, & Knutson, 2004, p. 46)

The need for organizational change has become pervasive in today's rapidly shifting business, social, and economic environments. Near-constant changes in technology, business practices, globalization, and stakeholder demographics are all driving the need for organizational change (Barker, 1998; Breakey, n.d.; Eisold, 2010). Gass (2010) stated that organizational change is a constant. Organizations that do not evolve and adapt can lose market share, lower stakeholder credibility, and decrease organizational morale (Edmonds, 2011). The uncertain economic environment resulting from this myriad of factors serves as a catalyst for organizational change to ensure organizational survival (Adcroft, Willis, & Hurst, 2008; Edmonds, 2011). Organizational change can be viewed as a continuously evolving process composed of periods of experimentation followed by periods of adaptation (Al-Haddad & Kotnour, 2015; Bamford & Forrester, 2003). Another way to view this cyclic nature of organizational change is as a series of varying periods of change and periods of stability (i.e., peaks and valleys; Waddell & Sohal, 1998).

Just as organizational change is pervasive and constant, so is organizational resistance to change (Breakey, n.d.; Eisold, 2010). Research has attributed organizational resistance to change to three causal areas: rational objections, psychological factors, and sociological factors (Broner, 2003). Organizational resistance to change can be of a conscious or subconscious nature (Eisold, 2010). Another characteristic of organizational

resistance to change is that it is often viewed as conflict by organizational leadership (Manning, 2012; Waddell & Sohal, 1998).

The uncertain cyclic business environment and inherent organizational resistance to change is presenting challenges for gated golfing communities across North America. Additionally, these same communities are being negatively impacted by the demographic transition of community memberships dominated by greatest generation and older baby boom generation individuals to community memberships comprised of younger baby boom generation and Generation X individuals (McMahon Sr., 2016a; Strutz, 2016). The quandary facing the leadership of gated golfing communities is that the emerging North American demographic composition is not interested in and does not have a desire for the same amenity sets as the previous demographic generations. This is particularly true in golf (K. Burke, 2017). Younger members of the baby boom generation and members of Generation X simply do not wish to spend 4 to 5 hours on the golf course. This decreased interest in golf, and the associated reduction in purchased golf memberships, has resulted in financial straits and a demonstrable need for clear transformative leadership for many of the gated golfing communities across North America.

Transformational leadership has been defined as a “style of leadership in which the leader identifies the needed change, creates a vision to guide the change through inspiration, and executes the change with the commitment of the members of the group” (“Transformational Leadership,” n.d., para. 1). Northouse (2007) stated that transformational leadership is a back-and-forth series of interactions between organizational leaders and organizational subordinates that culminates in increased levels of motivation and morality in both organizational leaders and organizational

subordinates. Transformational leadership theory has its beginnings, and early maturation in the seminal leadership works of James MacGregor Burns, Bernard M. Bass, and Bruce J. Avolio (Flores, 2015; Harris, 2015; Stewart, 2006).

North American gated golfing communities are simultaneously addressing organizational change, organizational resistance to change, and shifting membership demographics. Each of these elements informs the leadership choices, opportunities, and future viability of North American gated golfing communities.

### **Background**

Homeowners' governance in the context of gated golfing communities within Southern California's Coachella Valley, organizational change, organizational resistance to change, and transformational leadership will be presented to establish a baseline understanding of the contextual situation facing the researcher of the given subject material.

The homeowners' association governance model has become prevalent throughout North America (Doherty, 2000). This governance model is widespread within gated golfing communities. The general managers of gated golfing communities within Southern California's Coachella Valley are facing leadership challenges inherent to the homeowners' association governance model, shifting North American demographics, and organizational resistance to change by community members.

### **Coachella Valley Gated Golfing Community General Managers**

The leadership structure of gated golfing communities typically consists of a full-time professional management organization consisting of the general manager, supporting departmental heads, administrative staff, and functional (i.e., fitness, food and

beverage, golf maintenance, etc.) employees who are responsible for the day-to-day operations of a given community. The general manager is responsible for these day-to-day activities while also serving as the interface between the organizational management activities and the community members' desires via their homeowners' association(s) board of directors (Club Managers Association of America [CMAA], n.d.-d; Koenigsfeld, Kim, Cha, Perdue, & Cichy, 2012). The general manager is a professionally trained and credentialed individual in multiple areas including club and community governance, leadership, financial operations, recreational management, food and beverage services, and human resources management (CMAA, n.d.-k). The general manager's professional development and credentialing is conducted under the auspices of professional organizations such as the Club Managers Association of America (CMAA, n.d.-a), the Community Associations Institute (CAI, n.d.-b), the Community Association Managers International Certification Board (CAMICB, n.d.), and the Professional Golfers' Association of America (PGA, n.d.). The general manager is a key player in balancing the day-to-day community operations against the constantly morphing community demographics.

### **Coachella Valley Gated Golfing Communities**

Snyder (2003) defined gated communities as residential areas that are comprised of elements that are normally construed as public spaces that have been privatized. These communities are typically defined by perimeter walls or fencing and have limited, security-controlled access points. The study of homeowners' associations affords an opportunity to discern whether this governance model is a positive or negative force in

building stronger communities while allowing for community member engagement via self-governance (Doherty, 2000).

**Southern California's Coachella Valley (Riverside County).** The Coachella Valley is an approximately 45-mile by 15-mile (length x width) valley located in Riverside County, California (Porter & Porter, n.d.). The Coachella Valley is geographically located approximately 120 miles due east of the Los Angeles, California metropolitan basin; approximately 100 miles north of the United States-Mexico border; and 120 miles northeast of San Diego, California. It is surrounded by mountains on the eastern, northern, and western sides. The southern portion of the valley abuts the Sonoran Desert and Salton Sea (Porter & Porter, n.d.; USGS, 2006; Wersan, 2015; Wisely, 2012).

The Coachella Valley is comprised of nine separate and economically diverse cities: Cathedral City, Coachella, Desert Hot Springs, Indian Wells, Indio, La Quinta, Palm Desert, Palm Springs, and Rancho Mirage. The economies of these cities vary from an agricultural basis in the eastern end of the valley to economies based on recreational sports and vacation destinations in the middle and western end of the valley. Throughout the Coachella Valley, there is a large and significant service industry presence. There are approximately 125 public and private golf courses and 45 gated communities within the Coachella Valley (D. Williams, n.d.-b).

**Coachella Valley demographics.** Coachella Valley demographics are diverse and varied. The average age of the adult population in the Coachella Valley is 50 years old (HARC, 2017b). The population characteristics vary from a significant retiree population to a large lesbian, gay, bisexual, transgender, and queer (LGBTQ) population;

a large number of Hispanics/Latinos and Native Americans; and a significant number of agricultural workers and farmers. A particularly unique characteristic of the Coachella Valley is the number of seasonal “snowbirds” who typically spend the months of November through April in the valley. Snowbirds constitute approximately 24% of the Coachella Valley’s population (LeComte-Hinely, 2012). These snowbirds are typically individuals who live in northern climate states and Canada, who come to the Coachella Valley for its mild winter weather while escaping the harsh winters of their home domiciles.

### **Generational Cohorts**

North American demographic age classifications and characteristics from several authors can be found within the literature. Wohl (1979) defined the lost generation as those individuals born in the years 1883-1900. This generation was characterized by individuals who fought in World War I (Wohl, 1979). Bump (2014) described individuals born between the years 1901 and 1946 as the greatest generation while Fry (2016a) characterized the greatest generation as individuals born before 1928. This demographic is represented by individuals who fought in World War II (Bump, 2014; Fry, 2016a). A subclassification of the greatest generation, the G.I. generation, identified by Strauss and Howe (1991) and Fry (2016a), represents individuals born in the years 1925-1942. As with the greatest generation, this demographic is characterized by individuals who fought in World War II (Fry, 2016a; Strauss & Howe, 1991). Birkman (2016) referred to any individuals born before 1945 as traditionals. This generational demographic is characterized by economic hardship (Birkman, 2016). Individuals born between the years 1945 and 1964 are commonly referred to as the baby boom generation



(Birkman, 2016; Bump, 2014; Fry, 2016a). The baby boom generation is the largest generational demographic, by birth, at approximately 76 million births (Fry, 2016a). Following the baby boom generation is Generation X. Birkman (2016) and Fry (2016a) defined Generation X as those individuals born in the years 1965-1980. Birkman (2016) characterized Generation X as being represented by latchkey kids, high divorce rates, and working moms while Fry (2016a) characterized Generation X as a period reflecting a decreased birth rate of approximately 55 million births. Bump (2014) and Strauss and Howe (1991) defined Generation X as those individuals born between the years 1965 and 1984. Individuals born between the years 1981 and 1997 represent the millennial generation (Birkman, 2016; Fry, 2016a). Bump (2014) defined the millennial generation as those individuals born between the years 1985 and 2004. Birkman (2016) stated that millennials are the largest generational demographic while Bump (2014) characterized the millennial generation as being represented by self-absorbed, narcissistic individuals. Finally, Fry (2016a) defined the postmillennial generation as those individuals born between the years 1998 and 2014.

For this study, the demographic categories and descriptions defined by Bump (2014) were utilized. Bump described four key demographic groups applicable to this study: greatest generation, baby boom generation, Generation X, and millennials. Table 1 contains the generational characteristics of the four applicable generational demographics.

**Greatest generation (1901-1945).** The greatest generation is characterized as those individuals who fought in World War II (Bump, 2014). This generation is on a

steady decline as its members pass away. In 2018, members of the greatest generation would be 73-117 years of age (Bump, 2014; Fry, 2016b).

Table 1

*Age Demographics in Chronological Order According to Bump*

Generation	Description
Greatest generation (1901-1945)	This generation fought in World War II.
Baby boom generation (1946-1964)	This generation encompasses the period following the end of World War II accompanied by great economic and societal growth.
Generation X (1965-1984)	This generation covers the 20-year period following the baby boom years in which U.S. birth rates were significantly reduced as compared to the baby boom generation.
Millennials (1985-2004)	The characteristics of this generation are still being defined; however, the current definition tends to be unflattering as it tends to describe self-absorbed, narcissistic individuals.

*Note.* Adapted from “Here is When Each Generation Begins and Ends, According to Facts,” by P. Bump, 2014, *The Atlantic* (<http://www.theatlantic.com/national/archive/2014/03/here-is-when-each-generation-begins-and-ends-according-to-facts/359589/>).

**Baby boom generation (1946-1964).** The baby boom generation represents the period following the culmination of World War II and is marked by significant economic and societal growth (Bump, 2014). As with the greatest generation, the baby boom generation numbers are beginning to decline as this demographic continues to age. In 2018, members of the baby boom generation would be 54-72 years of age (Fry, 2016b).

**Generation X (1965-1984).** This generational demographic represents the period following the baby boom years and is marked by a significantly reduced birth rate compared to that of the previous generation (Bump, 2014). At the time of writing, older Generation X members are approaching full retirement age while younger Generation X members are in their prime earning years. In 2018, members of Generation X would be 34-53 years of age (Fry, 2016b).

**Millennial generation (1985-2004).** Millennials represent the largest generational age demographic (Fry, 2016a). While larger than Generation X, the birth rate for the millennial generation, approximately 66 million, was still smaller than the baby boom generation's 76 million births (Fry, 2016a). In 2018, members of the millennial generation would be 14-33 years of age (Bump, 2014; Fry, 2016b).

**Gated golfing community generational cohorts.** The population of gated golfing communities is primarily composed of individuals from three of the four generations defined by Bump (2014): greatest generation, baby boom generation, and Generation X. The interactions between these three demographics are presenting challenges for the leadership of gated golfing communities due to differing recreational, amenity, and social desires between the three demographics (Strutz, 2016). L.-V. Cox (2016) stated that these interaction challenges are manifestations of the unique characteristics found within each generation.

### **Demographic Impacts**

Gated golfing communities are facing significant headwinds as their membership demographics transition from being dominated by individuals from the greatest generation and older baby boom generation to memberships comprised of individuals from the younger baby boom generation and Generation X (McMahon Sr., 2016a; Strutz, 2016). The quandary facing gated golfing communities is that the newer demographic composition does not want or desire the same amenity sets as those that were acceptable to the older demographics. This is particularly true in golf (K. Burke, 2017). Younger baby boom generation and Generation X members simply do not wish to spend 4 to 5 hours on the golf course. This decreased interest in golf, and the associated reduction in

purchased golf memberships, has resulted in financial straits for many of the gated golfing communities within the Coachella Valley.

The divergent desires of the greatest generation, baby boom generation, Generation X, and the millennial generation represent a broad and diverse universe ranging from golf to community architecture. Although golf is a significant issue due to it being a large revenue source for many gated golfing communities, other amenities and community features have just as differing levels of attractiveness to the various demographic generations. Tennis centers are becoming racquet centers to represent the introduction of paddle tennis and pickleball. The community gym is now a fitness center with spa services. Zumba and yoga are just as important as the number of ellipticals, exercise bikes, and treadmills. The languid, quiet clubhouse pool is now a “resort style” pool with dedicated lanes for lap swimmers, water aerobics, and food and cocktail services.

Food and beverage services are not immune to differing levels of generational desire and demand. Individuals from the greatest generation and older baby boom generation appreciate the “fine dining” experience with cocktails and an upscale wine menu while Generation Xers and millennials are looking for the sports bar experience with “pub grub,” outdoor dining options, signature drinks, and a selection of the latest microbrews.

The ranch-style architecture that was attractive to the greatest generation and baby boom generation in the mid-1980s is perceived as old, tired, and dated to the other generational demographics. The lack of stone facades on homes is noticeable to Generation Xers and millennials but acceptable to members of the greatest generation and

baby boom generation. Desert landscaping is much more attractive and acceptable to Generation Xers and millennials whereas greatest generation and baby boom generation members see lush and verdant grass as the desired norm.

### **Organizational Change**

The literature is replete with books addressing organizational change, such as those by Ackerman-Anderson and Anderson (2010), Bolman and Deal (2011), and Hiatt and Creasey (2012). The topic is also addressed in many peer-reviewed journal articles by authors such as Borucki and Sollazzo (1990), Burnes (2003), and Vora (2013). Finally, doctoral research addressing organizational change is represented by the works of Haringa (2009), Harvey (2014), and Underdue Murph (2005).

In recent years, change leadership has become even more complex as business, education, societal norms, and demographics continue to evolve (Stewart, 2006). This evolving environment affords ample research opportunities for change theorists and researchers (Carten, 2002; Jansson, 2013).

Organizational change is presented via two subtopic areas: historical perspective and context of organizational change and organizational change characteristics. The subtopic area of historical perspective and context of organizational change is presented next.

**Historical perspective and context of organizational change.** The need for organizational change has become pervasive in today's rapidly shifting business and economic environments. Near-constant changes in technology, business practices, globalization, and stakeholder demographics are all driving the need for organizational change (Barker, 1998; Breakey, n.d.; Eisold, 2010). Organizations that do not evolve and

adapt can lose market share, lower stakeholder credibility, and decrease organizational morale (Edmonds, 2011). The uncertain economic environment resulting from this myriad of factors is forcing organizational change to ensure organizational survival (Adcroft et al., 2008; Edmonds, 2011). Organizational change can be viewed as a continuously evolving process composed of periods of experimentation followed by periods of adaptation (Al-Haddad & Kotnour, 2015; Bamford & Forrester, 2003). Another way to view this cyclic nature of organizational change is as a series of varying periods of change and periods of stability (Waddell & Sohal, 1998).

**Organizational change characteristics.** Strong organizational leadership and management during periods of near-constant organizational change is paramount to organizational success. Gass (2010) stated that organizational change is a constant. Unfortunately, there is a premium on good leadership that can align the following disparate areas: organizational goals and imperatives, the requisite change processes, and diverse organizational stakeholders. This lack of skilled change leadership results in many change initiatives failing due to a lack of the requisite leadership skill sets and aptitudes to successfully lead organizational change efforts. Adcroft et al. (2008), Burnes (2003), Grint (1998), and Vora (2013) stated that successful organizational change is driven by leadership skills, not management skills. The research clearly shows that strong organizational leadership is a necessary component of all institutions undergoing change initiatives to facilitate organizational growth and future success.

### **Organizational Resistance to Change**

Organizational resistance to change is also a mature research field with well-documented and readily available research materials (D. L. Anderson, 2015; Kotter,

1996; Manning, 2012; Senge et al., 1999). Research on organizational resistance to change can be found in the published books of Kanter, Stein, and Jick (1992) and P. C. White, Harvey, and Fox (2016); peer-reviewed journal articles written by Oreg and Berson (2011) and Waddell and Sohal (1998); and finally, doctoral research as evidenced by the works of Barrett (2007) and Broner (2003). Individual resistance to change is prevalent in today's multifaceted environments (Bamford & Forrester, 2003; Barker, 1998) and is often responsible for organizational conflict (Shin, Seo, Shapiro, & Taylor, 2015; Waddell & Sohal, 1998).

Organizational resistance to change is presented via two subtopic areas: historical perspective and context of organizational resistance to change and characteristics of organizational resistance to change. The subtopic area of historical perspective and context of organizational resistance to change is presented first.

**Historical perspective and context of organizational resistance to change.** Just as organizational change is pervasive and constant, so is organizational resistance to change (Breakey, n.d.; Eisold, 2010). One of the earliest examples of organizational resistance to change occurred in the mid-1800s when shipyard workers commenced a strike against the U.S. government that was ultimately successful (Barrett, 2007). This is just one of many examples of individuals resisting, fighting, and even sabotaging organizational change (Eisold, 2010; Oreg & Berson, 2011; Shin et al., 2015).

**Characteristics of organizational resistance to change.** Research has attributed organizational resistance to change to three causal areas: rational objections, psychological factors, and sociological factors (Broner, 2003). Another characteristic of

organizational resistance to change is that it is often viewed as conflict by organizational leadership (Manning, 2012; Waddell & Sohal, 1998).

### **Transformational Leadership**

Transformational leadership is presented via two subtopic areas: transformational leadership defined and the development of transformational leadership theory. A working definition of transformational leadership is presented first.

**Transformational leadership definition.** Transformational leadership has been defined as a “style of leadership in which the leader identifies the needed change, creates a vision to guide the change through inspiration, and executes the change with the commitment of the members of the group” (“Transformational Leadership,” n.d., para. 1). Northouse (2007) stated that transformational leadership is a back-and-forth series of interactions between organizational leaders and organizational subordinates that culminates in increased levels of motivation and morality in both organizational leaders and organizational subordinates.

**Development of transformational leadership theory.** Transformational leadership theory has its beginnings and early maturation in the seminal leadership works of Burns, Bass, and Avolio (Flores, 2015; Harris, 2015; Stewart, 2006). Transformational leadership theory has been at the forefront of academic debate since the mid-1980s (Stewart, 2006). The theoretical underpinnings of transformational leadership were first presented by Burns (1978) in his book titled *Leadership* (Bass, 1996; Yukl, 1989). While Burns’s work was the foundational source of transformational leadership theory, it was the work of Bass and Avolio that firmly cemented its position in the business and academic research environments. Bass and Avolio’s work served to address



the identified limitations and omissions of Burns's earlier work (Stewart, 2006). Today, contextual researchers of transformational leadership exist in various settings including business (Fullan, 2001; Kotter, 1996), education (Flores, 2015; Harris, 2015; Stewart, 2006), and the military (Bass, 1996; Kane & Tremble, 2000; Smith, 2010), to list just a few.

**Transformational leadership traits.** For this study, the four transformational leadership traits identified through the research efforts of Bass, Avolio, and Riggio were utilized. The four transformational leadership traits identified by these authors are charismatic leadership/idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration (Bass, 1985, 1990; Bass & Avolio, 1990, 1993; Bass & Riggio, 2006). These four transformational leadership traits are often referred to as the four *Is* in the academic literature (Bass, 1990; Steinwart & Ziegler, 2014).

***Idealized influence.*** Bass and Riggio (2006) stated that a transformational leader is a role model for his or her followers. Transformational leaders are admired, venerated, and respected by their followers, who wish to emulate them. Transformational “leaders are endowed by their followers as having extraordinary capabilities, persistence, and determination” (Bass & Riggio, 2006, p. 6). Transformational leaders take calculated risks, always do the right thing, and have strong moral and ethical codes.

***Inspirational motivation.*** Transformational leaders are motivators and serve as an inspirational force for their followers (Bass & Riggio, 2006). Transformational leaders instill high levels of team spirit in their followers. Transformational “leaders get followers involved in envisioning attractive future states; they create clearly

communicated expectations that followers want to meet; and, also demonstrate commitment to goals and a shared vision” (Bass & Riggio, 2006, p. 6).

***Intellectual stimulation.*** Bass and Riggio (2006) stated that transformational leaders encourage their followers to think outside of the box. New ideas and approaches to solving organizational challenges are encouraged by transformational leaders. Transformational leaders stimulate creativity, innovation, and a questioning of long-standing assumptions (Bass & Riggio, 2006).

***Individualized consideration.*** Transformational leaders focus on the growth, advancement, and achievements of each individual follower (Bass & Riggio, 2006). They are mentors and coaches to their followers. Bass and Riggio (2006) explained, “Individualized consideration is practiced when new learning opportunities are created along with a supportive climate. Individual differences in terms of needs and desires are recognized” (p. 7).

### **Statement of the Research Problem**

The rapidly shifting business environment is forcing organizations to embrace and adopt organizational change to remain relevant (Appelbaum, Habashy, Malo, & Shafiq, 2012). At the same time, organizational members are inherently resistant to any change to the status quo (Breakey, n.d.; Harvey, 2014). The literature shows that transformational leadership is a means to institute and successfully carry out organizational change while simultaneously overcoming organizational stakeholders’ resistance to change (Boone, 2015; Franklin, 2014).

The fields of organizational change and organizational resistance to change are mature, diverse, and well-researched arenas ranging from a pure research approach to

organizational change consultancy. Adcroft et al. (2008) presented a leadership model for managing organizational change. D. L. Anderson (2015) detailed the development and leadership of organizational change. Organizational change in a K-12 educational environment was presented by Broner (2003). Grint (1998) looked at the multitude of factors facing leaders while instituting change initiatives. Finally, Lawler and Worley (2006) studied organizational change and organizational resistance to change from an effectiveness perspective. While each of the above examples addressed organizational change and organizational resistance to change, each was clearly from a unique and diverse viewpoint. Each of these studies, and many others, added to the body of knowledge on organizational change and organizational resistance to change.

Homeowners' associations have been widely studied from various approaches such as governance (Carlee, 2011), leadership (Stirling, 1997), community culture (Snyder, 2003), and community change and transformation (Carten, 2002).

Homeowners' associations have been described as an effective means to afford disparate community members a method to participate in the democratic governance of their communities (Doherty, 2000). Various studies have shown the efficacy of homeowners' associations (Blanco, 2013; Britt, 2005; Nelson, 2011). S. C. Y. Chen and Webster (2005), McCarl (2015), and Tao and McCabe (2012) focused on some of the more negative aspects of homeowners' associations. Regardless of the approach taken, each of these studies added to the existing research body of knowledge.

Transformational leadership has its roots in the seminal work of Burns in his 1978 book, *Leadership* (Yukl, 2006). Since the publishing of this seminal work, subsequent works by researchers and authors such as Bass (1990), Bass and Avolio (1990), Bass and

Riggio (2006), Kotter (1996), and Northouse (2007) have contributed to and greatly expanded the existing transformational leadership body of knowledge. Transformational change leadership has also been studied by authors such as Blanchard, Britt, Hoekstra, and Zigarmi (2009), Boone (2015), Ackerman-Anderson (2016), and Kotter and Cohen (2002).

The existing body of knowledge reflects studies conducted independently exploring organizational change, organizational resistance to change, homeowners' associations, and transformational leadership. Research on organizational change can be found in the works of Ackerman-Anderson and Anderson (2010), Adcroft et al. (2008), and Brown (2012). Research on organizational resistance to change can be found via the works of Barrett (2007), Kanter et al. (1992), and Appelbaum, Degbe, MacDonald, and Nguyen-Quang (2015a, 2015b). Homeowners' associations have been addressed in the works of Britt (2005), R. Cheung, Cunningham, and Meltzer (2014), and Doherty (2000). Finally, transformational leadership is addressed in the work of Bass and Riggio (2006), Burns (2003), Katou (2015), and Summers (2016).

Although the existing body of knowledge reflects significant works addressing organizational change, organizational resistance to change, homeowners' associations, and transformational leadership, there is a clear gap in research incorporating all four of these elements. The transformational leadership traits of general managers have not yet been formally studied. Transformational leadership traits of general managers overcoming resistance to change while implementing organizational change have also not been formally studied. Similarly, studies addressing the transformational leadership traits of general managers operating within a homeowners' association governance model are

also missing from the academic body of knowledge. Finally, no research has been found incorporating all four of these disparate elements. Investigating the relationship between organizational change, organizational resistance to change, homeowners' associations, and transformational leadership clearly affords an opportunity to address a gap in the literature while contributing to the existing body of knowledge.

### **Purpose Statement**

The purpose of this qualitative case study was to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary purpose was to explore and describe generational cohorts' resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley.

### **Research Questions**

This study utilized three research questions to focus and guide associated research efforts:

1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?

## **Significance of the Problem**

Gated golfing communities are facing significant challenges due to economic factors and changing community demographics (Bohannon, 2017c; Vain, 2017a, 2017c). The current research body of knowledge incorporating the five elements of organizational change, organizational resistance to change, the homeowners' association governance model, generational cohorts, and transformational leadership is insufficient in its depth and breadth. This study addressed and integrated the interaction of these five disparate elements in the given context of Southern California's Coachella Valley gated golfing communities. More specifically, this study contributes to closing the academic literature gap by addressing these five elements within a single communal study setting.

Organizational change and organizational resistance to change are mature research fields and are well represented in the academic literature. The topic of organizational change can easily be found in published books (Ackerman-Anderson & Anderson, 2010; Fullan, 2001; Kotter, 1996), peer-reviewed journal articles (Adcroft et al., 2008; Appelbaum et al., 2012; Boone, 2015), doctoral research (Singh, 2016; A. Taylor, 2015), and conference workshop materials (Ackerman-Anderson, 2016). Organizational resistance to change is also well represented in the academic literature. Published books addressing organizational resistance to change can be found by Kanter et al. (1992), D. L. Anderson (2015), and P. C. White et al. (2016). The topic of organizational resistance to change is well represented in academic journals as well. This is evidenced by the works of Appelbaum et al. (2015a, 2015b), Bamford and Forrester (2003), and Oreg and Berson (2011). However, clearly missing from the academic

research body of knowledge are works addressing organizational change and organizational resistance to change within gated golfing communities.

The homeowners' association governance model is also well represented in the academic body of knowledge. Homeowners' association research is available from several different perspectives: as a governance model in the works of Doherty (2000) and Carlee (2011); from an economic perspective in the works of Murray and Lieb (2016) and Scheller (2010); and, finally, from a leadership perspective in the works of Snyder (2003), Stirling (1997), and R. Cheung et al. (2014). However, there is an evident academic literature gap involving transformational leadership, transformational change, and overcoming resistance to change within a community governed by a homeowners' association governance paradigm.

The academic literature contains significant research concerning transformational leadership in traditional organizational settings. This research is based on the early seminal theoretical works of Burns (1978), Bass and Avolio (1990), Senge (1990), and Yukl (2006). More recent examples can be found in the works of Crowley (2011), Fullan (2011), Shelton (2012), and Qin (2014). The use of transformational leadership, and leadership in general, within gated communities has been addressed in the works of industry and private consultancy firms such as the McMahon Group (Lareau, 2016; McMahon Sr., 2016a; Strutz, 2016). However, an academic research knowledge gap is clearly present when searching for information on the use of transformational leadership within gated communities, the use of transformational leadership to effect positive change in gated communities, and the use of transformational change to overcome community resistance to change while implementing community change initiatives.

Finally, Southern California's Coachella Valley has seen a series of golf course closings, both within gated golfing communities and private golf clubs, due to the changing demographics and economic disruptions of the past decade (Bohannon, 2015c). These course closings have had significant economic impacts on those communities involved (Bohannon, 2017c). Murphy (2015) stated that the number of golf courses in the Coachella Valley is greater than the demand for those courses, leading to further closures. These closures will significantly impact the economic viability of the communities associated with the affected golf courses. The impact to home prices of a course closure has been estimated to be a loss of value in the range of 20% to 40% as the impacted community derives value from the mere presence of a golf course (Barkas, 2015; Murphy, 2015). Additionally, the closure of the golf course results in a significant impact on the revenue stream of the affected community, leading to diminished amenity offerings, which makes the community less attractive to potential buyers. The impact of golf course closures to the economic viability of the affected communities cannot be overstated. There is a clear gap in the academic knowledge and research addressing the leadership of Coachella Valley gated golfing communities as they undergo significant organizational change, the inherent resistance to change encountered during these change events, and the impacts, both positive and negative, the presence of a homeowners' association governance model has on these events.

## **Definitions**

### **Theoretical Definitions**

**Homeowners' association.** A nongovernmental entity established by real estate developers to facilitate the ownership and maintenance of designated common green



areas, streets, facilities, amenities, and sidewalks (Blanco, 2013; Honggang, 1995; Internal Revenue Service, 2016; McCabe, 2011).

**Idealized influence.** Transformational leaders are admired, venerated, and respected by their followers, who wish to emulate them. Transformational leaders take calculated risks, always do the right thing, and have strong moral and ethical codes (Bass & Riggio, 2006).

**Individualized consideration.** Transformational leaders focus on the growth, advancement, and achievements of each individual follower. They act as mentors and coaches to their followers (Bass & Riggio, 2006).

**Inspirational motivation.** Transformational leaders are motivators and serve as an inspirational force for their followers. Transformational leaders instill high levels of team spirit in their followers. They also instill a commitment to a shared organizational vision (Bass & Riggio, 2006).

**Intellectual stimulation.** Transformational leaders encourage their followers to think outside of the box. New ideas and approaches to solving organizational challenges are encouraged by transformational leaders. Transformational leaders stimulate creativity, innovation, and a questioning of long-standing assumptions (Bass & Riggio, 2006).

**Transformational leadership.** A style of leadership that instills a shared vision in stakeholders, fosters a continuous learning environment (group, team, and individual), and focuses on overcoming organizational and individual resistance to change, all while achieving effective organizational change strategies (Burns, 1978; Kouzes & Posner, 2007; Northouse, 2007; Yukl, 1989).

## **Operational Definitions**

**Baby boom generation (baby boomers).** Generational cohort born between the years 1946 and 1964 (Bump, 2014).

**Coachella Valley.** An approximately 45-mile by 15-mile (length x width) valley located in Riverside County, California (Porter & Porter, n.d.).

**Computer-assisted qualitative data analysis software/qualitative data analysis software (CAQDAS/QDAS).** The use of computers and computer software programs to aid with qualitative data analysis processes (Woods, Macklin, & Lewis, 2016; Woods, Paulus, Atkins, & Macklin, 2015).

**General manager.** An individual trained and professionally credentialed by the CMAA (n.d.-j).

**Generation.** A group of individuals born within a defined period who share common experiences and knowledge affecting their behavior, thoughts, values, beliefs, and attitudes (M. Johnson & Johnson, 2010).

**Generation X (Gen-X).** Generational cohort born between the years 1965 and 1984 (Bump, 2014).

**Greatest generation.** Generational cohort born between the years 1901 and 1945 (Bump, 2014). Also referred to as the G.I. generation, traditionals, traditionalists, veteran, veterans, matures, and the silent generation.

**Latchkey kids.** School-age children left at home unsupervised for extended periods of time due to working parents (M. Johnson & Johnson, 2010).

**Millennial generation.** Generational cohort born between the years 1985 and 2004 (Bump, 2014).

**NVivo.** Computer software program designed to aid in the interpretation of qualitative research data sets.

**Snowbirds.** Part-time Coachella Valley residents typically in residence November to April (LeComte-Hinely, 2012).

### **Delimitations**

This study had four delimitations:

1. The study was delimited to gated golfing communities.
2. The study was further delimited to communities located in Southern California's Coachella Valley.
3. The study was further delimited to only general managers currently serving in that organizational role within their respective communities.
4. The study was further delimited to four community age demographics: greatest generation, baby boom generation, Generation X, and millennial generation.

### **Organization of the Study**

This study is organized into a total of five chapters, a reference list, and associated appendices. Chapter I consisted of an introduction and general overview of the study. Chapter II provides a comprehensive literature review including leadership theory and leadership research, organizational change theory and research, theory and research on organizational resistance to change, gated communities, generational cohort characteristics, the homeowners' association paradigm, transformational leadership within homeowners' association communities, and resistance to change within homeowners' association communities. Chapter III provides a detailed description of the research design and methodology utilized to conduct this study. Chapter IV presents the

study findings related to the use of transformational leadership by general managers to overcome community resistance to change. Finally, the dissertation concludes with Chapter V, which provides a study summary, findings, conclusions, research implications, and recommendations for future research efforts.

## CHAPTER II: REVIEW OF THE LITERATURE

Leaders can also shape and alter and elevate the motives and values and goals of followers through the vital *teaching* role of leadership. This is *transforming* leadership. The premise of this leadership is that, whatever the separate interests persons might hold, they are presently or potentially united in the pursuit of “higher” goals, the realization of which is tested by the achievement of significant change that represents the collective or pooled interest of leaders and followers. (Burns, 1978, p. 425)

Gated golfing communities within Southern California’s Coachella Valley are facing economic, demographic, and societal headwinds. The most recent recession, weak dollar, slow to minimal job growth, and resulting economic malaise in Canada and the United States have impacted the demand for homes within Coachella Valley gated golfing communities, resulting in depressed property values and reduced home sales. The decline of the silent generation and baby boom demographics and the subsequent ascent of Generation X and millennial demographics has presented gated golfing community leadership with a high demand signal for community change initiatives. These initiatives include changes to community amenity offerings, changes to community facilities, and changes to community architectural guidelines, to name just a few. Generation Xers and millennials are strong advocates and supporters of these community change initiatives while the silent generation and baby boomers are just as strongly opposed and resistant to these community change initiatives. Finally, the homeowners’ association governance paradigm found within gated golfing communities plays a major role in defining and bounding the societal norms of each community. The acceptable

norms of the earlier generational demographics (silent generation/baby boomers) can be, and often are, at odds with the younger generational demographics (Generation X/millennials; McMahon Sr., 2016b; Vain, 2016, 2017b). On a daily basis, the general managers of Coachella Valley gated golfing communities must confront, adapt to, prepare for, and overcome the constantly morphing economic, demographic, and societal headwinds impacting their communities. This study explored the use of transformational leadership by Coachella Valley gated golfing community general managers to address the myriad internal and external forces affecting their respective communities while addressing shifting community generational cohort demographics.

According to Boote and Beile (2005), “A thorough, sophisticated literature review is a pre-condition for doing substantive, thorough, sophisticated research” (p. 3). The literature review process affords the researcher a means to acquire, synthesize, summarize, and develop a thorough understanding of the current knowledge corpus as it applies to his or her research question(s) (Creswell, 2014; Machi & McEvoy, 2012; Pan, 2016; Roberts, 2010). Finally, Bryant (2004) stated that the literature review provides the researcher with the requisite “scholarly context” (p. 65) for his or her field of study.

Chapter II contains a review of the existing literature. The literature review contains six main topic areas: gated communities, the homeowners’ association governance paradigm, generational cohorts, organizational change, organizational resistance to change, and transformational leadership. Each of these topic areas is further categorized into subtopics, resulting in a narrowing and funneling approach/structure to the literature review. Each topic area begins with a broad general overview of the

associated literature. Following the general overview presentation, the reader is then presented with a more detailed and focused review of the literature.

The first section introduces gated communities, gated community general managers, the state of golf, and Southern California's Coachella Valley. This section presents the characteristics and history of gated communities, the role of the general manager in the day-to-day operations of a gated community, the national state of golf, and an overview of Southern California's Coachella Valley that includes an extensive listing of the gated golfing communities located within the Coachella Valley. The first section concludes with an analysis of the significant challenges facing Coachella Valley gated golfing communities.

The second section of the literature review provides a detailed analysis of the homeowners' association governance paradigm. Common characteristics of homeowners' associations are summarized and then presented in detail to the reader. The section concludes with an overview of the perceived benefits and pitfalls of the homeowners' association governance paradigm.

The third section synthesizes selected literature concerning the applicable age-based demographic generational classifications in use today. Generational differences are presented next and are followed by a detailed analysis of the four age-based demographic classifications applicable to this study: the greatest generation, the baby boom generation, Generation X, and the millennial generation. This section ends with a presentation of the economic impacts resulting from changes in the demographic composition of Coachella Valley gated golfing communities.

The fourth section presents the topic of organizational change. Organizational change characteristics are presented first. Organizational change research and organizational change models are then presented to the reader. This section ends with a presentation of two organizational change process models.

The fifth section presents information on organizational resistance to change. This section of the literature review begins with a presentation of organizational resistance to change and research efforts on organizational resistance to change. The reader is then presented with two detailed models of organizational resistance to change. The section concludes with a presentation of the research concerning overcoming organizational resistance to change.

The final section presents the concept of transformational leadership. The historical timeline/background of transformational leadership is presented first. The presentation of transformational leadership concludes with a review of transformational change.

The following review of the literature served as the contextual frame and foundation for this qualitative case study. The goal of this case study was to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary goal was to explore and describe generational cohorts' resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. The literature pertaining to gated communities, the first of six main topic areas, is presented next.



## **Gated Communities**

Gated communities are prevalent throughout the North American landscape mosaic (Blakely & Snyder, 1997; M. Burke, 2001; Lai, 2016; A. Walks, 2014; R. A. Walks, 2010; Webster, Glasze, & Frantz, 2002). Haug (2011) described gated communities as being “ubiquitous in places where retirees and snowbirds migrate: the southern and western United States; and the Canadian west, especially, British Columbia” (p. 52). The term *fortress* has also been utilized to describe today’s gated communities (Bjarnason, 2000; Blakely & Snyder, 1997; Callies, Franzese, & Guth, 2003) while Huyler (1997, p. 244), Marcuse (1997, p. 320), and Caldeira (1996, p. 303) referred to gated communities as “fortified enclaves.” Roitman (2013) described five characteristics of gated communities: “closure and privatization; security devices and amenities; private government and a code of conduct regulating behavior and housing construction; the social homogeneity of their residents; and their voluntary character” (p. 157). Finally, Le Goix referred to gated communities as both “an urban pathology” (Le Goix, 2003, para. 3) and as “homogeneous social environments” (Le Goix, 2005, p. 324).

Today’s gated communities are an outgrowth of the master-planned retirement communities prevalent during the 1960s and 1970s (Bjarnason, 2000; Blakely & Snyder, 1997; Boyd, 2005). Varying rationales exist in the literature for the proliferation of gated communities. Authors such as Bjarnason (2000), Blanco (2013), McKenzie (2005), Plaut (2011), and Sanchez, Lang, and Dhavale (2005) have identified a strong desire for security as a key rationale for the proliferation of gated communities. Other authors have identified economic considerations as a rationale for the proliferation of gated communities (Blakely & Snyder, 1997; Goldberg, 2006; LaCour-Little & Malpezzi,

2009; Le Goix, 2003; Xu & Yang, 2008). Researchers have also identified social segregation as a rationale for the proliferation of gated communities (Blanco, 2013; Goldberg, 2006; Le Goix, 2005; Low, 2001; Tao & McCabe, 2012). Finally, Goldberg (2006), Lobo (2004), and Xu and Yang (2008) identified the desire for a sense of community as a rationale for the proliferation of gated communities.

### **Gated Community Definition**

Diverse and varied definitions of gated communities exist throughout the academic literature. Blakely and Snyder (1997), A. Walks (2014), and Xu and Yang (2008) defined gated communities as residential areas characterized by restricted access in which areas customarily considered to be public spaces have been subsequently privatized for the exclusive use of community members. Roitman (2013) defined gated communities as “closed urban residential settlements voluntarily occupied by a homogeneous social group, where public space has been privatized by restricting access through the implementation of security devices” (p. 157). Chapman (2007) stated that gated communities are often characterized by restricted access, guarded and limited entry points, and high walls. In a similar vein, Vesselinov (2008) stated that a gated community is a residential area with physical barriers such as landscaping, walls, or fences designed to restrict access to the community. Finally, Boyd (2005) described gated communities as “residential areas with restricted access in which normally public spaces are privatized featuring designated perimeters and controlled entrances that are intended to prevent penetration by non-residents” (p. 6).

## **Gated Community General Managers**

Barrows (1994) noted, “To understand the managers is to better understand the effective management of clubs” (p. 85). The general managers of gated golfing communities are responsible for a diverse array of day-to-day activities (CMAA, n.d.-d). Hohol (1973) identified the central role that the general manager plays in a club or private community over 35 years ago. Koenigsfeld, Kim, et al. (2012) elaborated further on the general manager’s central role, stating that general managers serve as the interface between community staff members and the community board of directors while supporting and furthering the community’s stated values, norms, and traditions. In many ways, the general manager is very similar to a conductor of an orchestra tasked with seamlessly blending a collection of diverse musicians and instruments into one coherent sound. Instead of musicians and instruments, the general manager melds the myriad efforts of staff members with the continually morphing demands and positions of the community members.

Management development programs, teaching opportunities, professional association conferences, academic research, and student chapters colocated with university hospitality programs have surfaced as a central element for the professional development of individuals and organizations (Barrows & Walsh, 2002). This professional development occurs in partnership with professional associations (Club Managers Association of America [CMAA], Community Associations Institute [CAI], Community Association Managers International Certification Board [CAMICB], Professional Golfers’ Association of America [PGA]), universities, and the home organization of each participating general manager (Barrows & Walsh, 2002; Kent &

Perdue, 1989). A representative professional credential held by gated golfing community general managers is the Certified Club Manager (CCM) certification awarded by the CMAA.

The CCM was first offered in 1965 and has undergone a series of iterative changes resulting in its current form (CMAA, n.d.-c). The current CCM certification continuum is designed to further a general manager's professional and educational development throughout his or her career (CMAA, n.d.-c; Kent & Perdue, 1989). The CCM is a competency-based certification gained through extensive managerial and leadership experience, participation in association and educational programs, and passage of a comprehensive examination (Kent & Perdue, 1989; Koenigsfeld, 2007). Over the past 2 decades, extensive research has been conducted addressing the requisite leadership and managerial competencies for club managers and gated golfing community general managers (Koenigsfeld, 2007; Koenigsfeld, Perdue, Youn, & Woods, 2011; Koenigsfeld, Youn, Perdue, & Woods, 2012; Perdue, Ninemeier, & Woods, 2000, 2002; Perdue, Woods, & Ninemeier, 2001). This research has resulted in the identification of management attribute domains and core competencies associated with general managers of gated golfing communities.

Competencies are particular motivations, talents, attributes, and aptitudes commonly ascribed to individuals behaving in specific ways via a consistent manner (Dalton, 1997; Kochanski, 1997; Perdue et al., 2000). Kochanski (1997) also stated that the aggregated competencies of an organization's people constitute the organization's "capacity and capability" (p. 41). Koenigsfeld et al. (2011) stated that competencies are reinforced over time as individuals become acclimated and familiar with tasks requiring

mastery of identified skill sets. Finally, the continued study of managerial competencies is important as it informs educational and professional development programs for club managers (Barrows & Ridout, 2010).

Perdue et al. (2000, 2001, 2002) identified competencies perceived to be of value to successful general managers (Koenigsfeld, 2007). Tables 2 through 6 identify the managerial domains and core competencies identified by the authors over the course of three peer-reviewed studies (Perdue et al., 2000, 2001, 2002).

Table 2

*Managerial Domains/Core Competencies for Managers*

Competency domain	Number of competencies analyzed		
	1992 original	1998 (revalidation)	1999 (future)
Club management/governance	10	25	14
Food and beverage management	30	28	28
Club accounting and finance	12	15	15
Human and professional resources management	19	15	15
Building and facility management	18	20	19
External and governmental influences	9	8	8
Management and marketing	13	16	-
Management	-	-	7
Marketing	-	-	7
Sports and recreation management	-	-	31
Total	111	127	144

*Note.* Adapted from “Competencies Required for Club Managers,” by J. Perdue, J. Ninemeier, and R. Woods, 2000, *Cornell Hotel and Restaurant Administration Quarterly*, 41(2), p. 81; “Comparison of Present and Future Competencies Required for Club Managers,” by J. Perdue, J. D. Ninemeier, and R. H. Woods, 2002, *International Journal of Contemporary Hospitality Management*, 14(3), p. 144; and “Competencies required for Future Club Managers’ Success,” by J. Perdue, R. Woods, and J. Ninemeier, 2001, *Cornell Hotel and Restaurant Administration Quarterly*, 42(1), p. 61.

Table 3

*Top 10 Most Important/Most Used Competencies (Present Day)*

Competency	Domain
1. Budgeting	Accounting and finance
2. Financial statements	Accounting and finance
3. Professional behavior	Club management
4. Control of food and beverage operations	Food and beverage management
5. Employee relations	Human and professional resources
6. Chief operating officer/general manager	Club management
7. Supervision tactics	Human and professional resources
8. Implementing labor-cost controls	Food and beverage management
9. Calculation of actual food and beverage costs	Food and beverage management
10. Communication principles	Human and professional resources

*Note.* Present-day focus (1998 study). Adapted from “Competencies Required for Club Managers,” by J. Perdue et al., 2000, *Cornell Hotel and Restaurant Administration Quarterly*, 41(2), p. 83; “Comparison of Present and Future Competencies Required for Club Managers,” by J. Perdue et al., 2002, *International Journal of Contemporary Hospitality Management*, 14(3), p. 145; and “Competencies required for Future Club Managers’ Success,” by J. Perdue et al., 2001, *Cornell Hotel and Restaurant Administration Quarterly*, 42(1), p. 65.

Table 4

*Top 10 Most Important/Most Used Competencies (Future Need)*

Competency	Domain
1. Budgeting	Accounting and finance
2. Financial statements	Accounting and finance
3. Communication principles	Human and professional resources
4. In-house communication	Marketing
5. Cash-flow forecasting	Accounting and finance
6. Employee relations	Human and professional resources
7. Balancing job and family	Human and professional resources
8. Time management	Human and professional resources
9. Supervision tactics	Human and professional resources
10. Various board relations	Accounting and finance/Human and professional resources

*Note.* Future-need focus (1999 study). Adapted from “Comparison of Present and Future Competencies Required for Club Managers,” by J. Perdue et al., 2002, *International Journal of Contemporary Hospitality Management*, 14(3), p. 145; and “Competencies required for Future Club Managers’ Success,” by J. Perdue et al., 2001, *Cornell Hotel and Restaurant Administration Quarterly*, 42(1), p. 65.

Table 5

*Top 10 Least Important/Least Used Competencies (Present Day)*

	Competency	Domain
1.	Carpets and floors	Building and facility management
2.	Electrical system costs	Building and facility management
3.	Waste management	Building and facility management
4.	Ceilings, walls, furniture, fixtures, and equipment	Building and facility management
5.	Unions, negotiations, and collective bargaining	External and governmental influence
6.	Lighting systems	Building and facility management
7.	Golf-facility operations	Club management
8.	Lodging operations	Building and facility management
9.	Parking areas	Building and facility management
10.	History of clubs	Club management

*Note.* Present-day focus (1998 study). Adapted from “Competencies Required for Club Managers,” by J. Perdue et al., 2000, *Cornell Hotel and Restaurant Administration Quarterly*, 41(2), p. 84; and “Comparison of Present and Future Competencies Required for Club Managers,” by J. Perdue et al., 2002, *International Journal of Contemporary Hospitality Management*, 14(3), p. 145.

Table 6

*Top 10 Least Important/Least Used Competencies (Future Need)*

	Competency	Domain
1.	Parking areas	Building and facility management
2.	Laundry	Building and facility management
3.	Golf-intern program	Sports and recreation management
4.	Unions, negotiations, and collective bargaining	External and government influences
5.	Rules of golf	Sports and recreation management
6.	Types of clubs	Club governance
7.	Yacht-facilities management	Sports and recreation management
8.	Fundamentals of management	Management
9.	Lodging operations	Building and facility management
10.	History of clubs	Club governance

*Note.* Future-need focus (1999 study). Adapted from “Comparison of Present and Future Competencies Required for Club Managers,” by J. Perdue et al., 2002, *International Journal of Contemporary Hospitality Management*, 14(3), p. 145; and “Competencies required for Future Club Managers’ Success,” by J. Perdue et al., 2001, *Cornell Hotel and Restaurant Administration Quarterly*, 42(1), p. 64.

While Perdue et al.'s (2000, 2001, 2002) research focused on the core competencies of senior leadership, Fjelstul and Tesone (2008) conducted a study to identify core managerial competencies for entry-level golf and club supervisory personnel. The core competencies identified by Fjelstul and Tesone for entry-level golf and club supervisory personnel were as follows:

- Beverage management . . .
- Food, beverage, and labor cost control . . .
- Leadership and strategic management . . .
- Hospitality financial accounting . . .
- Hospitality human resources . . .
- Quantity food production . . .
- Recreation and sports management (p. 697)

The findings by Fjelstul and Tesone were similar to those competencies identified by Perdue et al. (2000, 2001, 2002).

Koenigsfeld (2007) conducted a study to examine and identify the managerial competencies used by private club managers in the daily performance of their job. An important point raised by Koenigsfeld was that competencies are not the sole province of general managers and others in leadership positions since competencies “can help the clubs['] board of directors understand the complexity of the manager's job” (p. 61). At the conclusion of the study, Koenigsfeld identified a total of 151 managerial competencies of which 28 were identified as essential, 120 as considerably important, and three as moderately important. The 28 essential competencies represented a diverse cross-section of the CMAA managerial competency domains including leadership,



interpersonal, technical, administrative, and conceptual-creative domains. Ten of the 28 essential competencies were from the leadership domain.

Building on the previous studies conducted by Perdue et al. (2000, 2001, 2002) addressing managerial competencies used by private club managers, Koenigsfeld et al. (2011) conducted a study utilizing a sample comprised of 800 private club managers focusing on managerial competencies identified as the most important and most frequently utilized by private club managers as applied to the private club industry. Managerial competencies are a vital component of numerous professional development and certification programs conducted by professional associations such as the CMAA (Kent & Perdue, 1989; Koenigsfeld, 2007; Koenigsfeld et al., 2011). Table 7 lists the managerial competencies (12 domains/clusters) by overall importance and overall frequency as determined by Koenigsfeld et al. (2011).

Table 7

*Overall Importance/Frequency Rankings of Managerial Competencies*

Managerial domain (cluster) by importance	Managerial domain (cluster) by frequency
1. Leadership	1. Leadership
2. Interpersonal	2. Interpersonal
3. Administrative (Accounting)	3. Administrative (Accounting)
4. Administrative (Human resources)	4. Administrative (Human resources)
5. Technical (Food and beverage)	5. Technical (Food and beverage)
6. Conceptual-creative	6. Conceptual-creative
7. Administrative (Club governance)	7. Technical (Club governance)
8. Administrative (Legal)	8. Administrative (Legal)
9. Technical (Golf)	9. Technical (Golf)
10. Administrative (Marketing)	10. Technical (Sports and recreation)
11. Technical (Facilities)	11. Administrative (Marketing)
12. Technical (Sports and recreation)	12. Technical (Facilities)

*Note.* Adapted from “The Changing Face of Competencies for Club Managers,” by J. P. Koenigsfeld, J. Perdue, H. Youn, and R. H. Woods, 2011, *International Journal of Contemporary Hospitality Management*, 23(7), pp. 910-911.

Table 7 shows the leadership, interpersonal, and accounting domains as both the most important and most frequently utilized managerial competencies. Similar results reporting the leadership, interpersonal, and administrative domains as the most important and most frequently used were also reported by Koenigsfeld, Kim, et al. (2012).

**Club Managers Association of America (CMAA).** The CMAA is the leading professional association in the United States for private club managers (Barrows & Walsh, 2002; Fjelstul & Tesone, 2008; Perdue et al., 2000). The CMAA has approximately 6,700 members who are responsible for the leadership of over 2,500 clubs, including country and golf clubs (CMAA, n.d.-f; Robinson, 2005). The organization was founded in 1926 as the National Association of Club Managers (Koenigsfeld, Youn, et al., 2012). The CMAA (n.d.-e) mission statement states that the CMAA “advances the profession of club management by fulfilling the educational and related needs of its members” (para. 1; see also Perdue et al., 2002). To aid in achieving its stated mission, CMAA has three defined strategic priorities and 12 organizational objectives. The CMAA’s (n.d.-e) strategic priorities are as follows:

- Providing state-of-the-art educational programs for the CMAA membership;
- Representing the CMAA membership during interactions with allied associations, club members, and the broader public; and
- Providing unique information and resources that increase CMAA members’ performance and career potential. (para. 3)

Table 8 summarizes the CMAA’s 12 organizational objectives.

Table 8

*Club Managers Association of America Objectives*

No.	Objective
1.	Certification—Enhancing the member’s professional standing/status through certification offerings.
2.	Club management profession and individual clubs—Advancing the club management paradigm; Assisting individual CMAA members and their respective clubs.
3.	Communications—Effectively, and accurately, communicating with members, clubs, government, the media, and the public in general while simultaneously developing, maintaining tradecraft publications and other materials.
4.	Education—Providing a diverse array of educational programs and materials to meet a wide variety of educational needs.
5.	Ethics—Encouraging the highest ethical standards in all dealings with fellow club managers, club entities, and others.
6.	Executive career services—Able assisting/nurturing CMAA members throughout their career development and job opportunities while also assisting clubs in securing/hiring management personnel.
7.	Government relations—Interpreting and reporting on changing societal, governmental, and economics impacting club management efforts.
8.	Membership and internal association management—Recruiting and retaining members while efficiently managing the Association in a manner that represents the views of its members.
9.	Other organizational relations—Fostering appropriate relations with outside organizations that will further and contribute to the club industry as a whole and CMAA’s members.
10.	Premier Club Services®—Providing innovative programs, products, and services fostering the successful operation of clubs.
11.	Research and development—Conducting industry-specific research while developing, analyzing, and disseminating data related to club management operations and the club industry as a whole.
12.	Risk management—Serving as a resource for, and advocate of, CMAA members by providing risk management tools and insurance solutions education.

*Note.* Adapted from “CMAA Mission and Objectives,” by Club Managers Association of America (CMAA), n.d.-e (<http://www.cmaa.org/template.aspx?id=1388>).

***Certified Club Manager (CCM).*** Along with its educational offerings, the CMAA also offers a professional certification continuum consisting of several iterative certification programs. The centerpiece of this certification continuum is the CCM designation, which is recognized by the club industry as a significant career milestone and achievement for those who successfully attain it (CMAA, n.d.-a). The CCM designation signifies the attainment of the unique and ubiquitous skill sets necessary for

general managers, chief operating officers, and other private club organizational leaders and managers (CMAA, n.d.-c, n.d.-j; Koenigsfeld, 2007).

***Honor Society.*** Upon successfully attaining a CCM designation, the next certification along the continuum is the Honor Society designation (CMAA, n.d.-g). To attain this designation, a club manager must meet the following requirements:

- 400 additional credits beyond CCM designation with a minimum of 150 credits originating from CMAA endorsed education programs.
- CMAA professional membership for a minimum of 10 years.
- Successful completion of Business Management Institute (BMI) Tactical Leadership or BMI Strategic Leadership. (CMAA, n.d.-g, para. 1)

The next certification along the continuum is the Certified Chief Executive (CCE).

***Certified Chief Executive (CCE).*** The CCE designation serves to augment, not replace, the CCM designation (CMAA, n.d.-b). The CCE designation signifies the recipient's demonstrated ability to "serve as the most senior manager in a club" (CMAA, n.d.-b, para. 1). The stated requirements for achieving the CCE designation are as follows:

- active professional or retired professional member of CMAA;
- CCM designation;
- Honor Society status;
- successful completion of BMI Tactical Leadership and BMI Strategic Leadership;
- service as the top organizational executive (i.e., general manager, chief operating officer, or chief executive officer) for a minimum of 5 years (single or multiple clubs);
- submittal of the CCE Petition Form to CMAA;

- submittal of a current résumé documenting previous positions held;
- submittal of a notarized CCE Verification Form from the current club president stating that the applicant has served as the top executive for a minimum of 5 years (if multiple clubs are being utilized to accrue the 5-year minimum time in service, then a CCE Verification Form is required from each club); and
- submittal of a \$75.00 administrative fee (CMAA, n.d.-b).

The final designation of the certification continuum is the attainment of the Master Club Manager (MCM) certification.

***Master Club Manager (MCM).*** The MCM designation is the pinnacle of certifications presented by the CMAA. The MCM designation is intended to recognize those individuals who have made genuinely noteworthy, impactful, and enduring contributions to the club industry (CMAA, n.d.-i). A significant characteristic of the MCM certification is the requirement for a substantial written contribution to the club industry (CMAA, n.d.-i). At the time of this study, the CMAA (n.d.-i) web portal listed a total of 22 individuals who had obtained the MCM designation.

**CMAA management to leadership model.** Competency models provide organizations with a means to differentiate between genuinely superb employees and employees who are merely good (P. Y. Chen, Carsten, & Krauss, 2003; Lasse, 2015). The *Business Dictionary* defines a competency model as the “process of analyzing and describing types and range of abilities, knowledge, and skills present in an organization, or which it needs to acquire to gain a competitive advantage” (“Competency Modeling,” n.d., para. 1). Competencies and competency models are a product of job analysis derived from observable and quantifiable managerial skills (Jirasinghe & Lyons, 1995;

Koenigsfeld, 2007). The CMAA (n.d.-d) management to leadership model is a central point of focus for all of CMAA's educational and Business Management Institute (BMI) offerings (CMAA, n.d.-h).

In 2003, the CMAA introduced the first iteration of its management to leadership model (Koenigsfeld, 2007; Koenigsfeld et al., 2011). The first management to leadership model consisted of a pyramidal structure subdivided into three layers. The base layer consisted of the nine core competencies derived from the work of Perdue et al. that were developed over the course of three separate and distinct studies conducted in 2000, 2001, and 2002 (Koenigsfeld, 2007; Koenigsfeld et al., 2011). The middle layer represented the asset management role of the club manager. The top layer represented the role the manager played as the leader of the club operations (Koenigsfeld, 2007; Koenigsfeld et al., 2011).

Since its inception, the CMAA (n.d.-d) management to leadership model has been adapted to meet the growing and developing needs of the club industry. While still a three-stage pyramidal structure, the current iteration of the CMAA management to leadership model now reflects 10 core managerial competencies in the base layer vice the nine of the original model. The 10 core competencies reflected in the CMAA management to leadership model are listed below:

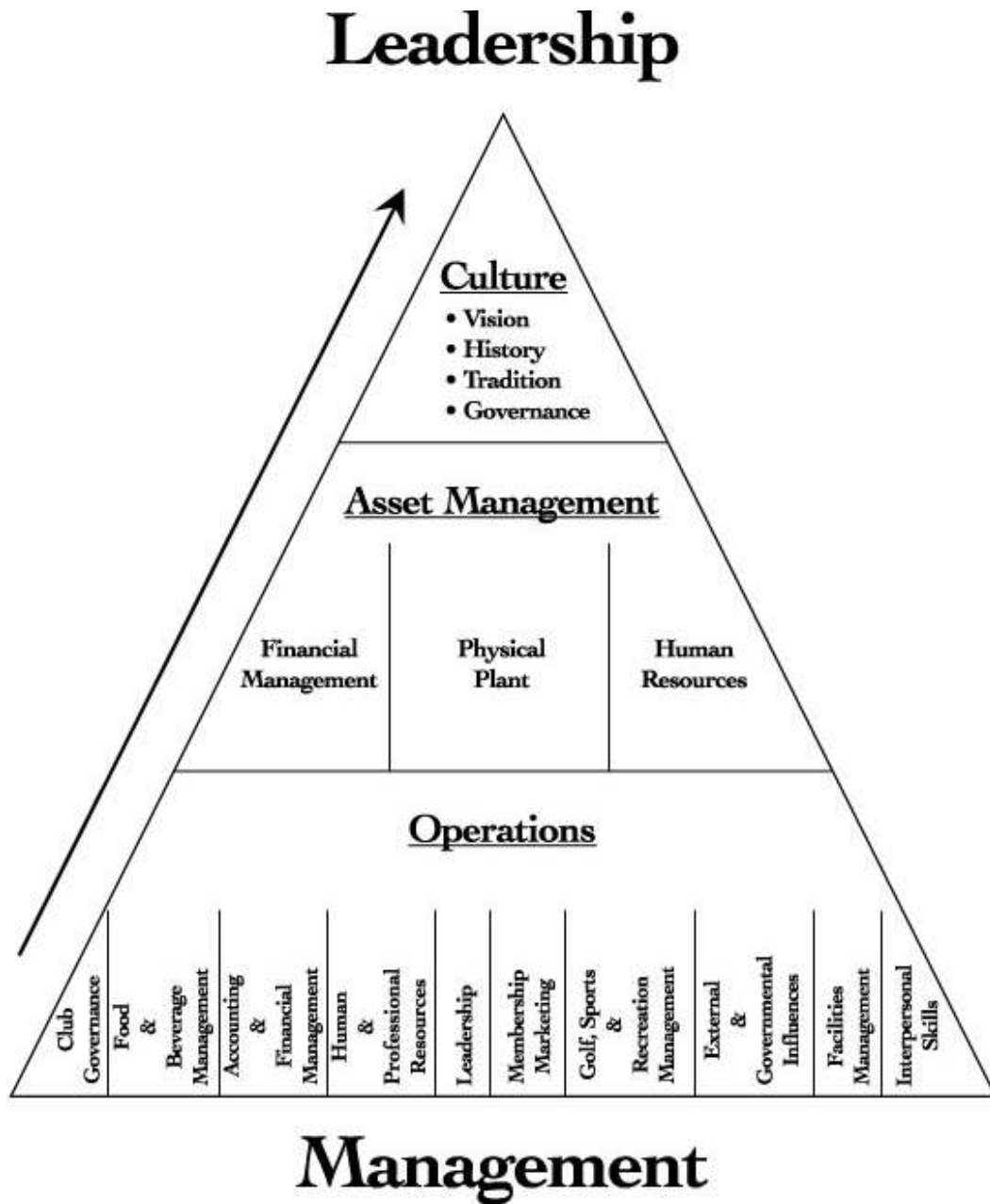
1. private club management,
2. human and professional resources,
3. management,
4. marketing,
5. food and beverage operations,

6. golf sports and recreation management,
7. accounting and financial management,
8. building and facilities management,
9. governmental and external influences, and
10. interpersonal skills.

The middle and upper tiers of the pyramidal structure still represent asset management and club culture functions as they did in the original iteration of the model. Figure 1 is a graphical representation of the CMAA management to leadership model. (Appendix A contains the researcher's request for permission to use the CMAA management to leadership model and CMAA's granting of permission for use.)

### **The State of Golf**

Golf is a cyclic industry (Hueber, 2012) impacted by economics and demographics, as are the gated golfing communities found within the Coachella Valley (McLaughlin, 2003; Perrault & Matheny, 2012; Pyl, 2007). As the national economy goes, so go the fortunes of gated golfing communities and private clubs (Back & Lee, 2009; Ferreira & Gustafson, 2006; Jackson, Barrows, & Ferreira, 2015). The 1980s represented a period of robust growth for Southern California golf (Barrows, 1994). The following decade represented a downturn in active golf participation (Ferreira & Gustafson, 2006; Pellisier, 1993). More specifically, a tapering off and decline in demand for new golf memberships was identified by Pellisier (1993), and as early as 1976, projections for limited growth rates for private clubs and communities became the norm (McGinty, 1976). The research findings of Barrows (1994) further supported the projection of a limited growth environment.



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Figure 1. CMAA management to leadership model. From “CMAA Management to Leadership Model,” by CMAA, n.d.-d (<http://www.cmaa.org/fullcontent.aspx?id=68>). Reprinted with permission.

Other researchers stated that the depressed U.S. economic environments of 2000-2003 and 2008-2010 resulted in a continued downturn in membership levels of private clubs and communities (Back & Lee, 2009; Ferreira & Gustafson, 2006; Jackson et al.,



2015). K. Burke (2017) stated that the 2011-2016 period was one of slow growth for U.S. golf industry participation and club memberships. Cooper (2006) identified negative perceptions of the golf industry by minorities as a key factor resulting in limited golf growth rates. Hueber (2012) stated that the master-planned golf communities were developed around the golf course amenity as a means to increase real estate values and property turnover rates. This development during the 1990s resulted in an excess supply of courses in the 2000s, resulting in “a lower average number of golf rounds on a per golf course basis” (Hueber, 2012, pp. 3-4).

The most recent data from the National Golf Foundation showed that 23.8 million people played golf in 2016, which was roughly equal to the same number of individuals playing golf in 1995 (Mike, 2017). Vain (2017a) and McMahon Sr. (2017a) stated that the most recent assessment of golf in private clubs showed that it is growing, particularly among women, children, and minorities. Additionally, Vain (2017a) stated that the most recent recession severely impacted private golf clubs, resulting in the loss of many older members/players while also discouraging younger members/players from joining. Finally, Mulligan (2001), citing the body of club theory literature focused on club economics, stated that the private golf course paradigm is economically inefficient and flawed by its very design.

### **Coachella Valley (Riverside County), California**

The Coachella Valley is an approximately 45-mile by 15-mile (length x width) valley located in Riverside County, California (Porter & Porter, n.d.). Figure 2 provides a graphical depiction of the Coachella Valley. Located in the western United States, the Coachella Valley is approximately 120 miles due east of the Los Angeles, California

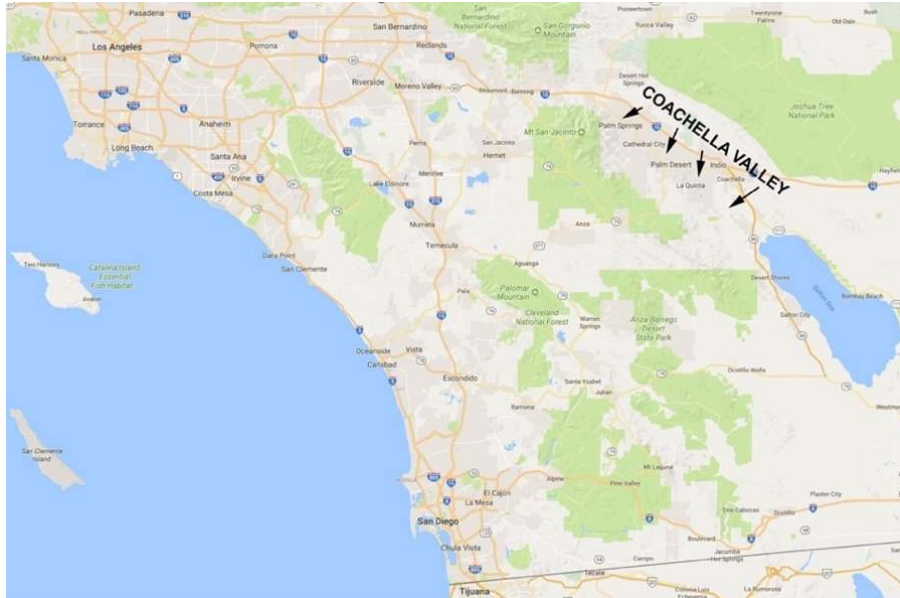
basin; 90 miles west of the California-Arizona border; and 120 miles northeast of San Diego, California as depicted by Figure 3 (Google, n.d.-a).



*Figure 2.* Coachella Valley (Riverside County, California). From Google Maps depiction of the Coachella Valley’s geographic positioning within Southern California, by Google, n.d.-a (<https://www.google.com/maps/@33.631478,-116.5153216,10.71z>). Adapted with permission.

The Coachella Valley has mountain ranges located on the eastern, northern, and western sides (Wersan, 2015; Wisely, 2012). Figure 4 graphically depicts the terrain composition of the Coachella Valley. The southern portion of the valley abuts the Sonoran Desert and the Salton Sea (Google, n.d.-b).

The Coachella Valley encompasses nine separate and diverse cities: Cathedral City, Coachella, Desert Hot Springs, Indian Wells, Indio, La Quinta, Palm Desert, Palm Springs, and Rancho Mirage (HARC, 2017b). Figure 5 depicts the geographical layout of the cities located in the Coachella Valley. The economies of these cities are diverse



*Figure 3.* Coachella Valley geographic positioning. From Google Maps depiction of the Coachella Valley’s geographic positioning within Southern California, by Google, n.d.-a (<https://www.google.com/maps/@33.631478,-116.5153216,10.71z>). Adapted with permission.



*Figure 4.* Coachella Valley terrain depiction. From Google Maps terrain depiction of Coachella Valley, by Google, n.d.-b (<https://www.google.com/maps/@33.6929663,-116.3656883,11.44z/data=!5m1!1e4>). Adapted with permission.

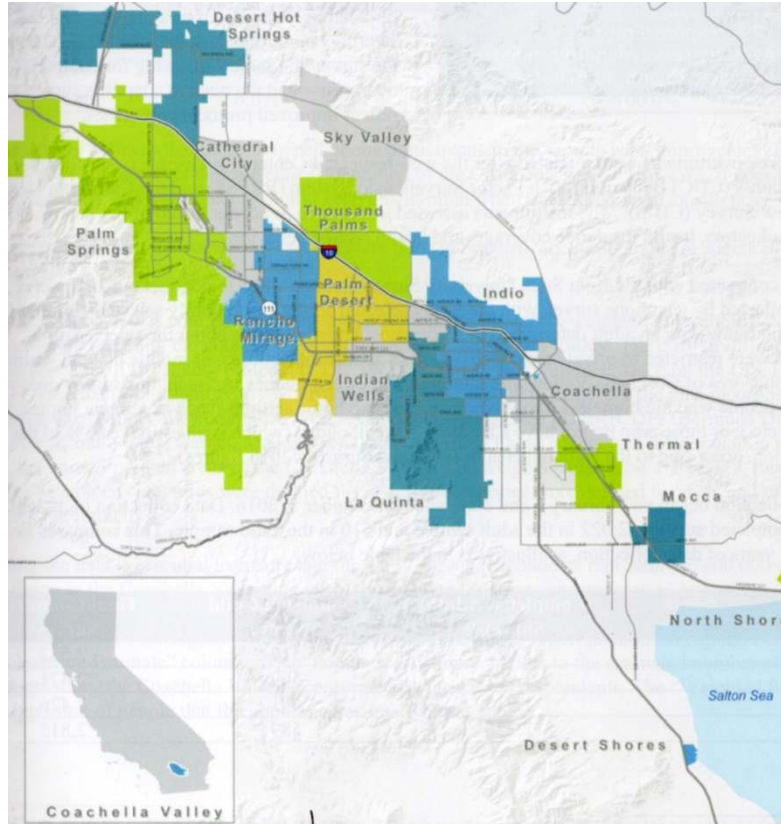


Figure 5. Coachella Valley city limits. From *Coachella Valley Health Survey 2016* (p. 3), by HARC, 2017b (<http://harcdata.org/coachella-valley-community-health-survey/>).

and varied, ranging from an agricultural basis in the east end of the valley to economies based on recreational sports and vacation destinations in the middle and west end of the valley.

**Coachella Valley golf.** The Coachella Valley has over 120 golf courses within its borders (James, 2015; Krieger, 2015; Z. Miller, 2014; Pyl, 2007; Strege, 2014).

Additionally, the Coachella Valley has been characterized as having the largest geographical concentration of golf courses within the United States (James, 2015; Krieger, 2015). These courses span a continuum ranging from private, limited-access facilities to fully public courses, with differing offerings in between. Coachella Valley courses are found in differing formats: standalone configurations, as an amenity of gated

country clubs, as an integral part of public golfing communities, as municipal course offerings, or as an integral component of gated golfing communities. There are approximately 42 gated golfing communities in the Coachella Valley (Bennion Deville Homes, n.d.; Mason, n.d.; D. Williams, n.d.-a). Appendix B provides a summary listing of the Coachella Valley gated golfing communities.

**Coachella Valley golf course closures.** Coachella Valley gated golfing communities have had to overcome and adapt to stagnant and declining national financial environments in both the United States and Canada, a prolonged drought with mandatory water restrictions, and shifting membership demographics (Bohannon, 2015c). The past few years have seen a significant change in the Coachella Valley golf environment, including several course closures (Barkas, 2015; Bohannon, 2015a). Palm Springs Country Club closed in 2007 (Bohannon, 2015a; Daniels, 2016). The Santa Rosa Golf Club and Rancho Mirage Country Club both ceased operations in 2015 (Barkas, 2015; Bohannon, 2015b, 2015c, 2017d).

In an attempt to stave off bankruptcy, or possible course closures, Coachella Valley golfing communities have proposed making golf and club memberships mandatory for all community residents (Murphy, 2015, 2016). This is in stark contrast to the current situation in which some Coachella Valley gated golfing communities allow community members to live in the community without golf or club membership. Changing/upgrading amenity offerings to entice new members has also been proposed (Bohannon, 2017a, 2017b; McMahon Sr., 2017b; Vain, 2017b). Finally, while the slowdown in golf appears to have leveled off in the Coachella Valley, with some courses even making a profit, more course closures are inevitable (Bohannon, 2017d).

## **Homeowners' Association Governance Paradigm**

A homeowners' association is a legal entity put into place by real-estate developers to manage the affairs of a given community (Feldscher, 2014). The Community Associations Institute (n.d.) stated that over 60 million Americans live in residential communities characterized by a homeowners' association governance paradigm (see also Bennett, 2008; Thorsby, 2016). In separate studies, McKenzie (2006) and Weiser and Neath (2016) identified homeowners' associations as the leading form of home ownership associated with single-family homes. Rahe (2002) stated that homeowners' associations constitute a derivation of community affording members the ability to make and implement decisions concerning their community, neighborhoods, and surrounding spaces. Rogers (2004), McCabe (2011), and Tao and McCabe (2012) stated that homeowners' association communities are an excellent opportunity for the study of alternative local governance paradigms. Finally, homeowners' associations are ultimately responsible for the maintenance, preservation, and enhancement of their communities' assets and, most importantly, property values (Feldscher, 2014; Huyler, 1997; B. E. Johnson, 2013; Scheller, 2010).

### **Homeowners' Association Characteristics**

While each homeowners' association is unique to its representative community, there are several key characteristics found in homeowners' associations regardless of size. Scheller (2010) identified five common characteristics of homeowners' associations: mode of establishment, member participation, governance structure, community levies, and the nature of community services. In contrast to Scheller, McKenzie (2006) identified five different characteristics of homeowners' associations:

“common ownership of real property, private land-use controls, private government, master planning and, with increasing prevalence, the use of various security features” (p. 11). The following paragraphs elaborate on two of the common characteristics of homeowners’ associations found in the literature.

**Developer establishment.** Homeowners’ associations are established by real-estate developers early in the planning stages of a new residential development (Boyd, 2005; Honggang, 1995; McCabe & Tao, 2006; Thorsby, 2016). McKenzie (2006), Siegel (2008), and Thorsby (2016) stated that local governments require residential developers to establish a community association as a development precondition. Tao and McCabe (2012) stated that homeowners’ associations are put in place before even the first construction efforts begin. Fischel (2004) stated that the developer-established homeowners’ associations are an outgrowth of the condominium industry as evidenced by the increased density patterns of the new residential developments.

**Governance via covenants, conditions, and restrictions (CC&Rs).** Covenants, conditions, and restrictions (CC&Rs) provide a framework within which community members operate. These CC&Rs serve as a community regulatory mechanism covering mundane items such as color choices, patio size and patio decorations, and the allowable number of permitted guests (Bjarnason, 2000; Boudreaux, 2009; Franzese, 2005; Weiser & Neath, 2016). Feldscher (2014), Doherty (2000), and Scheller (2010) identified CC&Rs as the legal governing documents and institutions for a given community. Finally, R. K. G. Cheung (2006) stated that CC&Rs provide an ordering mechanism for dispute resolution while simultaneously maintaining high property values.

## **Homeowners' Associations as Private Governments**

Evan McKenzie (1994), in his seminal work, *Privatopia: Homeowner Associations and the Rise of Residential Private Government*, was one of the first authors to refer to homeowners' associations as "private governments" (p. 122; see also McCabe, 2005). The Community Associations Institute (n.d.) has estimated that there are over 330,000 homeowners' associations, or private derivative communities, in the United States. This rise in private communities is a marked increase from the 500 private communities that existed circa 1965, as reported by Webster et al. (2002). The homeowners' association as a private government derives from land-use and planning documents and the inherent restrictive covenant legal structure (Le Goix & Vesselinov, 2015). R. Cheung et al. (2014) stated that the homeowners' association, as a private government, is a "mechanism for addressing heterogeneity in demand for services at the localized level" (p. 77), resulting in more responsive and nimble support for community members. The private government nature of the homeowners' association affords local municipalities a mechanism to transfer infrastructure and service responsibilities and costs to the new development (Le Goix, 2005; McKenzie, 1994, 2011; Meltzer & Cheung, 2014; Scheller, 2016). This transfer of services results in the homeowners' associations being responsible for items such as roads, trash collection, water services, and security (Le Goix, 2003; McCabe, 2011; Tao & McCabe, 2012; A. Walks, 2014), items that traditionally fall within the purview of local municipalities.

Is the private governance paradigm of homeowners' associations a benefit or a curse? A review of the literature can reveal a multitude of sources supporting either position, as a positive democratic force or as a negative dictatorial force. In actuality, a



consensus has yet to materialize as to the true merits of the homeowners' association governance paradigm (Wang, 2008).

**Democratic bastions.** Homeowners' associations have been described as "training grounds for democratic action" (Tao & McCabe, 2012, p. 691), arenas for "democratic participation" (Doherty, 2000, p. 1), and "schools of democracy" (Doherty, 2000, p. 18). Finally, Wang (2008) stated that homeowners' associations provide an opportunity for community members' participation in local democratic initiatives.

**Dictatorial bastions.** McKenzie (1994) referred to homeowners' association private governments as "illiberal and undemocratic" (p. 21). A. Walks (2014) stated that homeowners' associations can avoid the democratic rules and regulations that are normally applicable to the conduct of local governments due to their business structures, and Feldscher (2014) postulated that the organizational and governance structures themselves are key factors of community conflict. A common depiction of homeowners' associations colors them as overly petty and undemocratic (McKenzie, 1994; Tao & McCabe, 2012). Finally, Pollack (2013) stated that the democratic ideals of self-governance and participatory democracy are no better than an illusion hiding homeowners who are minimally involved in the community and boards that make minimal effort to involve the community in their processes and decisions.

### **Generational Cohorts**

According to L.-V. Cox (2016), "Within the human race are an infinite number of identifiable characteristics" (p. 54). These identifiable characteristics are known as demographics. Patten (2012) stated that demographics assist the end users of research to better visualize and understand a study's participants while Merriam and Tisdell (2016)

stated that demographic queries are part of all qualitative interviews. Identifiable characteristics such as gender, age, race, education, ethnicity, income level, marital status, and sexual orientation are commonly utilized to describe a particular study population (Lee & Schuele, 2012; Merriam & Tisdell, 2016; Patten, 2012). Researchers often utilize demographic variables as background variables, or delimiting variables, in their research (“Demography,” 2005; McMillan & Schumacher, 2010).

### **Generational Classifications**

Twenge (2014) stated, “Everyone belongs to a generation” (p. 2). Generational classifications are often based on unique behavioral traits and characteristics developed over the course of a lifetime by capstone events experienced during childhood and into early adulthood (Ahmad & Ibrahim, 2015; Campbell, Campbell, Siedor, & Twenge, 2015; Diaz-Martin, 2015; Howe & Strauss, 2000; Strauss & Howe, 1991; Twenge, 2009; Underwood, 2007). Iden (2016) stated that cohort characteristics are “traceable to cataclysmic events experienced during certain times” (p. 17). There are clear and meaningful differences between generational cohorts (Schullery, 2013; Twenge, 2010). Birkman (2016) stated that members of generational cohorts have similar personality traits, values, and behaviors; however, priorities are different for each generational cohort. These clear differences among generational cohorts result in diverse workforces requiring deft leadership abilities and managerial acumen (Ahmad & Ibrahim, 2015; Howe & Strauss, 2000). Twenge (2009) and Hendricks and Cope (2013) stated that the differences between generations represent cultural changes as a whole while Campbell et al. (2015) posited that “generations shape cultures and are not simply shaped by them” (p. 324). Additionally, Twenge (2014) stated that “generational differences are the

clearest manifestations of cultural change” (p. xii). Srinivasan (2012) stated that generational characteristics are “theorized to occur because of major influences in the environment within which early human socialization occurs” (p. 49). Finally, Arsenault (2004) stated that generations “create their own traditions and culture by a shared collective field of emotions, attitudes, preferences, and dispositions” (p. 124).

Strauss and Howe (1991) defined a generation as “a cohort-group whose length approximates the span of a phase of life” (p. 60). Underwood (2007) identified three “truths” (pp. 28-29) common to all generational cohorts. First, individuals form their core values and beliefs that will inform their behavior their entire lives by the time they reach their mid-20s. Second, increases in American life expectancies mean that for the first time in history, five distinct generational cohorts coexist simultaneously. Finally, an individual’s core values and attitudes, derived from his or her generational cohort, exert a strong lifetime influence over career choices, consumer decisions, and lifestyle preferences (Underwood, 2007).

The literature review revealed North American demographic age cohort classifications and generational characteristics from several authors. Appendix C presents a synthesis of these findings.

The generational cohorts as defined by Bump (2014) were utilized for the conduct of this study. Bump described four generational cohorts applicable to this study: greatest generation, baby boomers, Generation X, and millennials. Table 9 provides a listing of the four generational cohorts utilized for this study.

**Greatest generation (1901-1945).** Members of this generational cohort are referred to by differing monikers and birth years throughout the academic literature.

Table 9

*Generational Cohorts in Chronological Order According to Bump*

Cohort designation	Birth years
Greatest generation	1901-1945
Baby boomer generation	1946-1964
Generation X	1965-1984
Millennial generation	1985-2004

*Note.* Adapted from “Here is When Each Generation Begins and Ends, According to Facts,” by P. Bump, 2014, *The Atlantic* (<http://www.theatlantic.com/national/archive/2014/03/here-is-when-each-generation-begins-and-ends-according-to-facts/359589/>).

Bump (2014) utilized a single descriptive moniker, greatest generation, to cover the individuals born in the years 1901-1945 while other authors have utilized multiple monikers for the individuals born during the same period. Strauss and Howe (1991), Howe and Strauss (2000), and Underwood (2007) referred to this generational cohort as the G.I. generation. Birkman (2016) and Kupperschmidt (2000) described this generational cohort as traditionalists while Diaz-Martin (2015) described the cohort as traditionalists. De Long (2010) chose the term *veteran* to describe this generational cohort while the term *veterans* was utilized by Arsenault (2004), L.-V. Cox (2016), Hendricks and Cope (2013), and Zemke, Raines, and Filipczak (2013). Lyons, Duxbury, and Higgins (2007) described this generational cohort as matures. Finally, the term *silent generation* has been utilized by several authors to describe this generational cohort (Fry, 2016a, 2016b; Howe & Strauss, 2000; Schullery, 2013; Strauss & Howe, 1991; Underwood, 2007). Appendix C presents a more detailed synthesis of the differing nomenclatures found in the literature to describe the generational cohort referred to in this study as the greatest generation.

The term *greatest generation* was introduced to the academic lexicon by Tom Brokaw as the title for his 1998 *New York Times* best-selling book, *The Greatest Generation* (Bump, 2014; A. Ford & Dodds, 2013; Palerm, 2017). Before its appearance, this generational cohort was often differentiated by two distinctive generational cohort descriptors: G.I. generation and silent generation (L.-V. Cox, 2016; Howe & Strauss, 2000; Strauss & Howe, 1991; Underwood, 2007). Fry (2016a) stated that the greatest generation is currently the oldest living generation while L.-V. Cox (2016), Cugin (2012), Diaz-Martin (2015), Lester, Standifer, Schultz, and Windsor (2012), and Zemke et al. (2013) identified members of this generational cohort as the oldest individuals still participating in the workforce, although at a rapidly declining rate.

The greatest generation consisted of approximately 112 million births (Strauss & Howe, 1991). Bump (2014) stated that two key common characteristics of this generational cohort are that they participated in World War II and that the end of the generational cohort is defined by the ending of World War II. Strauss and Howe (1991) and Underwood (2007) stated that the Great Depression, World War II, and the postwar boom years (1946-1962) defined this generational cohort's core values. Additionally, Strauss and Howe (1991) described this generational cohort as being civic minded with an adaptive nature. Cugin (2012), L.-V. Cox (2016), Kupperschmidt (2000), and Zemke et al. (2013) stated that hard work is a defining value for this generational cohort.

The greatest generation is characterized by two-parent families (Cugin, 2012; Zemke et al., 2013) and saw the births of such luminaries as Walt Disney, Charles Lindbergh, Walter Cronkite, Martin Luther King, and Elvis Presley (Strauss & Howe,

1991). Finally, Underwood (2007) stated that this generational cohort was the “youngest marrying and youngest child-bearing generation in modern U.S. history” (p. 50).

**Baby boomer generation (1946-1964).** At one time, the baby boomers constituted approximately 25% of the U.S. population, making them the largest single generational cohort (L.-V. Cox, 2016); however, they were recently surpassed by the millennial generation in 2016, which has now become the largest living U.S. generational cohort (Cilluffo & Cohn, 2017; Fry, 2016a, 2017). The baby boomer generational cohort is the only generational cohort defined by the U.S. Census Bureau (Bump, 2014).

As was the case with the greatest generation, the academic literature differs in the naming and applicable years of the baby boomer generational cohort. Strauss and Howe (1991) and Howe and Strauss (2000) referred to this generational cohort as the boom generation. Twenge (2014) and Fry (2016a, 2016b) utilized the phrase *baby boom generation* to describe this generational cohort. The most common descriptor utilized for this generational cohort is the baby boomer generation (Bump, 2014; L.-V. Cox, 2016; De Long, 2010; Diaz-Martin, 2015; Hendricks & Cope, 2013; Lyons et al., 2007; Schullery, 2013; Zemke et al., 2013). Finally, Underwood (2007) referred to this generational cohort as the boomer generation. Appendix C presents a more detailed synthesis of the differing nomenclatures used to describe the baby boomer generational cohort.

According to Bump (2014), Strauss and Howe (1991), and Underwood (2007), the population peak of the baby boomer generation was approximately 80 million individuals. More specifically, Appelbaum, Serena, and Shapiro (2005) placed the total baby boomer generation population at approximately 76 million individuals. The baby

boomer generation began following the return of the greatest generation from World War II in the mid-1940s and ended in the mid-1960s amid rapid societal change and activism (e.g., the civil rights movement, the sexual revolution, the feminist movement, and opposition to the Vietnam War; Bump, 2014; De Long, 2010; Diaz-Martin, 2015; Underwood, 2007).

The Vietnam War in particular “left an indelible mark” on the baby boomer generational cohort (L.-V. Cox, 2016, p. 63). Underwood (2007) stated that the Vietnam War directly contributed to the development of three core values of the baby boomer generational cohort: a sense of empowerment, a need for engagement, and a belief that governments should be held accountable for their actions while supporting American troops in all of their endeavors.

Strauss and Howe (1991) characterized the baby boomer generation as being “idealist” in nature while being impacted by a “boom awakening in rising adulthood” (p. 299). Kupperschmidt (2000), Zemke et al. (2013), and Twenge (2014) also characterized the baby boomer generation as having an idealist nature. The 1950s through the 1970s were the primary formative years for the baby boomer generational cohort (Diaz-Martin, 2015; Underwood, 2007). The baby boomer generation is characterized by a number of work values including a strong work ethic, workaholic tendencies, individualism, personal growth and self-focus, a team-oriented focus, and a strong sense of what is right and what is wrong (Cogin, 2012; L.-V. Cox, 2016; Diaz-Martin, 2015; Strauss & Howe, 1991; Twenge, 2014; Underwood, 2007; Zemke et al., 2013). Arsenault (2004), via an extensive study, developed a generational ranking of

admired leadership traits. Table 10 is a synthesized representation of the mean rankings of Arsenault’s baby boomer generation admired leadership traits.

Table 10

*Baby Boomer Generation Top 10 Admired Leadership Traits*

Rank	Leadership trait	Mean
1	Honesty	2.63
2	Competence	3.32
3	Loyalty	4.54
4	Caring	5.21
5	Determination	5.65
6	Inspiration	5.70
7	Forward-looking	6.38
8	Ambitious	6.59
9	Self-confident	6.96
10	Imagination	7.58

*Note.*  $n = 790$ . Adapted from “Validating Generational Differences: A Legitimate Diversity and Leadership Issue,” by P. M. Arsenault, 2004, *Leadership & Organization Development Journal*, 25(2), pp. 132-134.

Appelbaum et al. (2005) conducted a study to determine the veracity of stereotypes in the workplace surrounding Generation X and baby boomers. Table 11 provides a consolidated listing of the baby boomer generation’s least and most important workplace motivational factors.

Table 11

*Baby Boomer Generation Workplace Motivational Factors*

Ranking	Most important motivational factor	Least important motivational factor
1	Stable and secure future	High prestige & social status
2	High salary	Freedom from supervision
3	Chance to learn new things	Chance to benefit society
4	Variety in work assignments	Opportunity to exercise leadership
5	Chance to use special abilities	Freedom from pressures to conform both on/off the job

*Note.* Adapted from Generation “X” and the Boomers: An Analysis of Realities and Myths,” by S. H. Appelbaum, M. Serena, and B. T. Shapiro, 2005, *Management Research News*, 28(1), pp. 11-13.



A 2010 Pew Research Center survey identified the self-described unique characteristics of the baby boomer generation (P. Taylor & Gao, 2014). Table 12 provides a consolidated listing of the baby boomer generation’s top five unique characteristics and their associated response rates.

Table 12

*Top Five Baby Boomer Generation Unique Characteristics*

Characteristic	Response rate
Work ethic	17%
Respectful	14%
Values/morals	8%
“Baby boomers”	6%
Smarter	5%

*Note.*  $n = 1205$ ;  $p < .05$ . Adapted from “Generation X: America’s Neglected ‘Middle Child,’” by P. Taylor and G. Gao, 2014, *Fact Tank* (<http://www.pewresearch.org/fact-tank/2014/06/05/generation-x-americas-neglected-middle-child/>).

Some notable baby boomers are Joe Namath, Donald Trump, Oprah Winfrey, Steve Jobs, and Bill Gates (Strauss & Howe, 1991). Iden (2016) posited that the ongoing withdrawal of the baby boomer generation from the workforce will result in economic constraints for both governments and corporate entities due to the increased demand for pension and Social Security payments, ultimately resulting in depleted financial reserves at the national and local levels. These depleted financial reserves lead to reduced service offerings at the local governmental level, ultimately impacting the viability of local communities. Finally, Birkman (2016) stated that the baby boomer generation is characterized by a strong nuclear family whereas Underwood (2007) stated that the baby boomer generation is the first generational cohort to see an increase in the divorce rate and fracturing of the nuclear family.

**Generation X (1965-1984).** Douglas Coupland popularized the modern derivation of Generation X in his 1991 book, *Generation X: Tales for an Accelerated Future* (P. Taylor & Gao, 2014; Underwood, 2007). Although the term *Generation X* has become the de facto descriptor for this generational cohort and is freely utilized in the academic literature (Birkman, 2016; Bump, 2014; De Long, 2010; Fry, 2016a, 2016b; Hendricks & Cope, 2013; Iden, 2016; Lyons et al., 2007; Schullery, 2013; Twenge, 2014; Zemke et al., 2013), other descriptors can still be found in the literature to describe this generational cohort. Strauss and Howe (1991) referred to this generational cohort as the “Thirteenth Generation” (p. 317). In a later revision to their work, Howe and Strauss (2000) referred to this generational cohort as Gen-X. Underwood (2007) chose to use GenX to describe this generational cohort. A common characterization of Generation X is that of the “latchkey” child (Birkman, 2016; L.-V. Cox, 2016; De Long, 2010; Kupperschmidt, 2000; Schullery, 2013; Underwood, 2007). Generation X has also been referred to as the “middle child” generation, stuck between the baby boomer generation and the millennial generation (Fry, 2016a; P. Taylor & Gao, 2014). Generation X serves as a demographic conduit, or bridge, between the baby boomer generation, which is demographically predominantly White, and the millennial generation, which is significantly more diverse (P. Taylor & Gao, 2014). Appendix C presents a more detailed synthesis of the differing nomenclatures used to describe the Generation X generational cohort.

The size of the Generation X generational cohort at approximately 58 million is significantly smaller than the baby boomer generation (approximately 80 million) that preceded it (Fry, 2016b; Underwood, 2007). Underwood (2007) identified three

determinants leading to the small size of the Generation X generational cohort: introduction of and widespread use of the birth control pill, legalization of abortion, and the rise of the feminist movement, resulting in women choosing a career in lieu of childbearing. Generation X is projected to overtake the baby boomer generational cohort in total living population in 2028 (Fry, 2016a).

Strauss and Howe (1991) characterized Generation X as having a reactive nature while being influenced by a “boom awakening in youth” (p. 317). P. Taylor and Gao (2014) described Generation Xers as self-reliant, skeptical, and extremely savvy. Similarly, Kupperschmidt (2000) identified Generation Xers as realists with a strong entrepreneurial spirit and a sense of independence. Finally, Hendricks and Cope (2013) and Iden (2016) identified Generation X as having an individualistic nature.

As with the baby boomer generation, work-value characteristics have also been attributed to Generation X. Cugin (2012) stated that the most important work-value characteristic for Generation X is asceticism. Cugin explained that asceticism, as used in this description of Generation X, consists of three components. The first component is a belief that “you cannot take it with you, so you might as well enjoy yourself” (Blau & Ryan, 1997, p. 443). The second component of asceticism is a belief that “if you have got it, why not spend it?” (Blau & Ryan, 1997, p. 443). The third and final asceticism component identified by Cugin (2012) is the belief that one should “eat, drink, and be happy, because who knows what tomorrow may bring” (Blau & Ryan, 1997, p. 443). Kupperschmidt (2000) identified a sense of balance, having fun, and a new employment paradigm (i.e., employers meet Generation Xers’ job demands, and Generation Xers will then do a good job) as key work values for Generation X. Bova and Kroth (2001)

identified a work environment that is “constantly challenging” (p. 58) while fostering learning and continuous growth as a key work value for Generation X. Finally, Zemke et al. (2013) also identified having fun as a key work value of Generation X.

Generation X’s formative years were the 1970s, 1980s, 1990s, and the early 2000s (Diaz-Martin, 2015; Underwood, 2007). In 2001, author and researcher Neil Howe stated that Generation X “has been all about survival” (as cited in Underwood, 2007, p. 162). This survival instinct arose from four significant themes inculcated by their parents’ generation that significantly influenced Generation Xers’ formative years: widespread divorce, significant numbers of career mothers, the rise of permissive parenting, and the rise of a mobile society (Underwood, 2007). Arsenault (2004), via an extensive study, developed a generational ranking of admired leadership traits for Generation X similar to that developed for the baby boomer generation. Table 13 is a synthesized representation of the mean rankings of Arsenault’s Generation X admired leadership traits.

Table 13

*Generation X Top 10 Admired Leadership Traits*

Rank	Leadership trait	Mean
1	Honesty	3.46
2	Competence	3.57
3	Determination	4.39
4	Loyalty	4.56
5	Ambitious	5.37
6	Inspiration	5.75
7	Caring	5.82
8	Forward-looking	6.83
9	Self-confident	7.21
10	Imagination	7.47

*Note.*  $n = 790$ ;  $p < .05$ . Adapted from “Validating Generational Differences: A Legitimate Diversity and Leadership Issue,” by P. M. Arsenault, 2004, *Leadership & Organization Development Journal*, 25(2), pp. 132-134.

Significant world events occurring during this generational period were the end of the Cold War; the fall of the Berlin Wall and subsequent collapse of the Soviet Union; *Roe v. Wade*, the U.S. Supreme Court decision upholding a woman’s right to abortion; the U.S. Embassy Iranian hostage crisis; the space shuttle Challenger explosion; the emergence of the AIDS epidemic; and the development and widespread dissemination of the personal computer (Cogin, 2012; Iden, 2016; Strauss & Howe, 1991; Underwood, 2007; Zemke et al., 2013).

As with the baby boomers, Appelbaum et al. (2005) determined the least and most important workplace motivational factors for the Generation X generational cohort. Table 14 provides a consolidated listing of Generation Xers’ least and most important workplace motivational factors.

Table 14

*Generation X Workplace Motivational Factors*

Ranking	Most important motivational factor	Least important motivational factor
1	Stable and secure future	High prestige & social status
2	High salary	Freedom from supervision
3	Chance to learn new things	Chance to benefit society
4	Variety in work assignments	Opportunity to exercise leadership
5	Opportunity for advancement	Freedom from pressures to conform both on/off the job

*Note.* Adapted from Generation “X” and the Boomers: An Analysis of Realities and Myths,” by S. H. Appelbaum et al., 2005, *Management Research News*, 28(1), pp. 11-13.

A 2010 Pew Research Center survey identified the self-reported unique characteristics of Generation X (P. Taylor & Gao, 2014). Table 15 provides a consolidated listing of Generation Xers’ top five unique characteristics and their associated response rates.

Table 15

*Top Five Generation X Unique Characteristics*

Characteristic	Response rate
Technology use	12%
Work ethic	11%
Conservative/traditional	7%
Smarter	6%
Respectful	5%

*Note.*  $n = 1205$ . Adapted from “Generation X: America’s Neglected ‘Middle Child,’” by P. Taylor and G. Gao, 2014, *Fact Tank* (<http://www.pewresearch.org/fact-tank/2014/06/05/generation-x-americas-neglected-middle-child/>).

Strauss and Howe (1991) stated that some notable Generation X individuals are Tom Cruise, Michael Jordan, Brooke Shields, and Mary Lou Retton. Finally, Generation X has been fundamentally impacted and shaped by a marked increase in the divorce rate, the beginnings of which were noted in the baby boomer generation, with an even further fracturing of the nuclear family (Birkman, 2016; Cogin, 2012; Diaz-Martin, 2015; Lyons et al., 2007; Underwood, 2007).

**Millennial generation (1985-2004).** The millennials are the largest and most diverse generational cohort (Birkman, 2016; Fry, 2017). One in three members of a given workforce are now members of the millennial generational cohort (Birkman, 2016). This generational cohort is known by many different monikers throughout the academic literature: millennial generation, Generation Y, net-geners, the millennials, echo-boomers, gen net, the Internet generation, digital natives, netters, nGen, generation nexters, net gen, Nintendo generation, and generation me (Arsenault, 2004; Y. G. Choi, Kwon, & Wansoo, 2013; De Long, 2010; A. Ford & Dodds, 2013; Karakas, Manisaligil, & Sarigollu, 2015; Lester et al., 2012; Schullery, 2013; Twenge, 2010, 2014; Zemke et al., 2013). Regardless of the moniker chosen, this generational cohort is technologically

proficient, technically competent, and racially and ethnically diverse (Ahmad & Ibrahim, 2015; Y. G. Choi et al., 2013; Fry, 2017; Hendricks & Cope, 2013; P. Taylor & Gao, 2014).

Birkman (2016) identified six strengths that members of the millennial generational cohort bring to a workplace: being team oriented/focused, having an optimistic approach to matters at hand, being comfortable in multitasking environments, having an inherent drive to learn and expand their workplace and leadership portfolios, being comfortable using technology, and being resolute when encountering challenges. Cugin (2012) stated that millennials desire and seek out new challenges and opportunities that fit their inherent skill sets, dislike bureaucracy, and desire flexibility in their work tasks, positions, and employers. Schullery (2013) and Lester et al. (2012) stated that the millennial generation is adept at training older generational cohorts with respect to technology due to their ready acceptance and use of technology throughout their daily routines. Finally, having fun at work is a key workplace value for the millennial generational cohort (Y. Choi, 2013; Lester et al., 2012; Schullery, 2013).

Strauss and Howe (1991) stated that the millennial generation is characterized by a civic nature. A civic nature is the result of a secular crisis in early adulthood and a subsequent spiritual awakening in late adulthood (Strauss & Howe, 1991). Howe and Strauss (2000) identified seven common traits of the millennial generation: As a collective body, they believe themselves to be something special; they feel sheltered as a result of broad and sweeping safety movements directed at children; they are confident that their generational cohort is powerful and has unlimited potential; they are team oriented and supportive of peers; they achieve to the point of being the “best-educated

and best-behaved adults in U.S. history” (p. 44); they are pressured to excel at everything they do; and they are conventional in their approach to social interactions.

In the 1990s, Strauss and Howe (1991) stated that the projected size of the millennial generation would be approximately 76 million. Zemke et al. (2013) placed the size of the millennial generation closer to 72 million while Fry (2017) placed the millennial generation’s size at approximately 75.4 million individuals.

As with the baby boomer generation and Generation X, Arsenault (2004) developed a generational ranking of admired leadership traits for the millennial generation. Table 16 is a synthesized representation of the mean rankings of Arsenault’s millennial generation admired leadership traits.

Table 16

*Millennial Generation Top 10 Admired Leadership Traits*

Rank	Leadership trait	Mean
1	Honesty	3.45
2	Determination	4.28
3	Loyalty	4.43
4	Competence	4.96
5	Ambitious	5.05
6	Inspiration	5.84
7	Caring	5.92
8	Self-confident	6.71
9	Forward-looking	6.94
10	Imagination	7.54

*Note.*  $n = 790$ ;  $p < .05$ . Adapted from “Validating Generational Differences: A Legitimate Diversity and Leadership Issue,” by P. M. Arsenault, 2004, *Leadership & Organization Development Journal*, 25(2), pp. 132-134.

A 2010 Pew Research Center survey identified the self-described unique characteristics of the millennial generation (P. Taylor & Gao, 2014). Table 17 provides a



consolidated listing of the millennial generation’s top five unique characteristics and their associated response rates.

Table 17

*Top Five Millennial Generation Unique Characteristics*

Characteristic	Response rate
Technology use	24%
Music/pop culture	11%
Liberal/tolerant	7%
Smarter	6%
Clothes	5%

*Note.*  $n = 1205$ . Adapted from “Generation X: America’s Neglected ‘Middle Child,’” by P. Taylor and G. Gao, 2014, *Fact Tank* (<http://www.pewresearch.org/fact-tank/2014/06/05/generation-x-americas-neglected-middle-child/>).

### **Coachella Valley Demographics**

The Coachella Valley population is growing at a rapid pace (Boegle, 2013; Coachella Valley Economic Partnership [CVEP], n.d.). The 2016 American Community Survey (CVEP, n.d.) and the 2016 Coachella Valley Community Health Survey (HARC, 2017b) each showed that the population of the Coachella Valley is represented by individuals from each of the previously identified generational cohorts as defined by Bump (2014). Table 18 is a synthesized listing of the population distribution of the Coachella Valley.

### **Demographic Impacts to Private Gated Communities**

Gated private communities are facing significant headwinds as their membership demographics transition from being dominated by members of the greatest generation and older baby boomers to memberships comprised of younger baby boomers, Generation Xers, and eventually millennials (McMahon Sr., 2016a; Strutz, 2016).

Table 18

*Coachella Valley, California Population by Age*

Source	Age demographic	Percentage of population
2016 American Community Survey <sup>a</sup>	0-19	26.1
	20-34	17.6
	35-54	23.7
	55+	32.5
2016 Coachella Valley Health Survey <sup>b</sup>	<20	32.4
	20s	13.0
	30s	13.7
	40s	11.8
	50s	10.1
	60s	9.0
	70+	10.0

<sup>a</sup>Coachella Valley Economic Partnership (CVEP, n.d.). <sup>b</sup>HARC (2017a).

The millennial generational cohort is currently the largest living generational cohort (Cilluffo & Cohn, 2017; Fry, 2016a, 2017). The quandary facing gated private communities is that the newer and younger demographic composition does not necessarily want or desire the same amenity sets as the older demographics (Bohannan, 2017a; McMahon Jr., 2017; Perrault & Matheny, 2012). This change in desire is particularly true in the area of golf (K. Burke, 2017). Younger baby boomers, Generation Xers, and millennials simply do not wish to spend 4 to 5 hours on the golf course (K. Burke, 2017; McMahon Sr., 2016b; Vain, 2017b). This decreased interest in golf, and the associated reduction in purchased golf memberships, has resulted in financial straits for many of the gated golfing communities within the Coachella Valley.

### **Organizational Change**

Organizational change is necessitated by a myriad of factors such as changing business environments, reducing costs, or improving employee quality of life (Hiatt &

Creasey, 2012). Organizational change has been described in a number of ways within the academic literature:

- “Change is inevitable” (Appelbaum et al., 2015a, p. 73).
- “Change is intensely personal” (Duck, 1998, p. 56).
- “Organizational change is a constant experience” (Church, Javitch, Siegal, Waclawski, & Warner-Burke, 1996, p. 25).
- “Try as you may, change cannot be controlled” (Little, 2014, p. 14).
- “Change cannot be managed. It can be understood, and perhaps led, but it cannot be controlled” (Fullan, 2001, p. 33).

What all of these short statements show is that organizational change is ubiquitous and ever-present. The need for organizational change has become pervasive in today’s rapidly shifting business and economic environments (Adcroft et al., 2008; Al-Haddad & Kotnour, 2015; Appelbaum et al., 2012; Broner, 2003; Sastry, 1997). The creation and implementation of change initiatives is a critical organizational imperative facing today’s organizational leaders (Eisenbach, Watson, & Pillai, 1999). Near-constant changes in technology, business practices, globalization, and stakeholder demographics are all driving the need for organizational change (Barker, 1998; Breakey, n.d.; Eisold, 2010; Kim, 2003). On a daily basis, organizations are faced with evolving organizational challenges and rapidly shifting business environments (Oreg & Berson, 2011).

Organizations that do not evolve and adapt can lose market share, lower stakeholder credibility, and experience decreased organizational morale (Edmonds, 2011). The uncertain economic environment at both the national and local levels resulting from this myriad of factors is forcing organizational change initiatives to ensure organizational

survival (Adcroft et al., 2008; Edmonds, 2011). Finally, Bamford and Forrester (2003) stated that organizational change and organizational change initiatives serve as an organizational “binding and steering mechanism” (p. 556).

Organizational change can be viewed as a continuously evolving process composed of periods of experimentation followed by periods of adaptation (Al-Haddad & Kotnour, 2015; Bamford & Forrester, 2003). Another way to view this cyclic nature of organizational change is as a series of varying periods of change and periods of stability (Waddell & Sohal, 1998). D. Anderson and Ackerman-Anderson (2010) and A. Taylor (2015) posited that organizational change processes must be strategically focused and deeply enmeshed with organizational business practices. Finally, D. Anderson and Ackerman-Anderson (2010) stated that organizational change processes are a “strategic discipline” (p. 256) that must be mastered by management to ensure organizational success.

### **Organizational Change Characteristics**

Strong organizational leadership and management during periods of near-constant organizational change are paramount to organizational success (Connors & Smith, 2011). Risk is an inherent component of change initiatives (Barker, 1998). Initiating and implementing successful change initiatives is a critical skill set of organizational leadership (Eisenbach et al., 1999). Haringa (2009), Church et al. (1996), Gass (2010), and Poutiatine (2009) stated that organizational change is a constant. Adcroft et al. (2008) stated that “organizations do not undergo transformation by accident” (p. 43) while Shanley (2007) stated that organizational change is “inevitable and ongoing” (p. 963). Unfortunately, there is a premium on good leadership that is capable of aligning

the following disparate areas: organizational goals and imperatives, the requisite change processes, and diverse organizational stakeholders (Gilley, Gilley, & McMillan, 2009; Shanley, 2007). This lack of skilled change leadership results in many change initiatives failing due to a lack of the requisite leadership skill sets and aptitudes to successfully lead organizational change efforts (Nasim & Sushil, 2011; Shanley, 2007). Adcroft et al. (2008), Burnes (2003), Grint (1998), and Vora (2013) stated that successful organizational change is driven by leadership skills, not management skills. Gilley et al. (2009) posited that identifiable and quantifiable managerial behaviors and skill sets are integral components of successful organizational change initiatives. The research has shown that strong organizational leadership is a necessary component of all institutions undergoing change initiatives to facilitate organizational growth and future success.

### **Organizational Change Research**

Extensive research has been conducted within the field of organizational change (Gilley et al., 2009). This research has been conducted via differing approaches, resulting in confusion regarding which approach should be utilized for any given situation, and more importantly, it has led to doubts concerning the relevance, validity, and veracity of the organizational change literature (Bamford & Forrester, 2003).

Carter, Armenakis, Feild, and Mossholder (2013) stated that “behavioral flexibility” (p. 954), identified as the ability to exhibit various behavioral patterns given varying circumstances, is critical when facing continuous organizational change initiatives. Shin et al.’s (2015) research showed that individual commitment levels, both normative and affective, directly impact the success or failure of organizational change initiatives. Shanker and Sayeed’s (2012) research efforts focused on organizational

climate and the resultant impact(s) it has on organizational change initiatives. Shanker and Sayeed identified five factors of organizational climate impacting organizational change initiatives:

1. “trusting relationship”—widespread organizational trust between members of the organization (p. 475);
2. “esprit de corps”—a macro-level perception of how the organization engenders and supports organizational prestige and leadership (p. 475);
3. “team-centeredness”—cohesiveness, importance of, and acceptance of team players within the organization (p. 475);
4. “goal-setting freedom”—organizational acceptance of performance goals, independent thoughts, and independent actions (p. 477); and
5. “organizational power direction”—organizational energies channeling, power accumulation, and the establishment of elevated performance standards relative to organizational peers (p. 477).

Jansson (2013) identified three common assumptions concerning organizational change found within the academic change research literature:

1. organizational change practices and processes are universal;
2. resistance to change is about resisting the intended changes; and
3. organizational change practitioners interact with and act on their organizational hierarchy groupings.

Eisenbach et al. (1999) identified three types of organizational change: incremental, radical, and continuous. Al-Haddad and Kotnour (2015) identified a “taxonomy of change literature” (p. 241) comprised of four central subject areas: type of

change, enablers of change, change methodologies, and change results. Figure 6 is a graphical representation of Al-Haddad and Kotnour's four-part change literature taxonomy. Vom Brocke, Schmiedel, Recker, Trkman, and Mertens (2014), Roeser and Kern (2015), Sikdar and Payyazhi (2014), and Xiang, Archer, and Detlor (2014) focused their research on organizational change efforts within a business process management (BPM)/business process redesign (BPR) paradigmatic lens. Finally, Bremer (2012), Cavanaugh (2016), Connors and Smith (2011), and Fullan (2001) approached organizational change processes from an organizational culture perspective in their research writings.

### **Organizational Change Process Models**

Throughout the academic literature, descriptive organizational change process models can be easily found. Haringa (2009) and Schein (2004) stated that current-day organizational change process models are based on the seminal work of author Kurt Lewin in his 1947 article, "Frontiers in Group Dynamics: Concept, Method and Reality in Social Science; Social Equilibria and Social Change." Lewin (1947) identified three major components of the change process: unfreezing, moving, and refreezing (Gilley et al., 2009; Raelin, 2003; Schein, 2004). Unfreezing addresses the need for an organization to convince the individuals affected by the change that change is needed for the betterment of the organization (i.e., create a perceived need for change; Lewin, 1947). The moving component addresses changes made by organizational members (workers and management) to their behaviors and work practices (i.e., implementing the organizational change). The refreezing phase addresses the support and reinforcement of

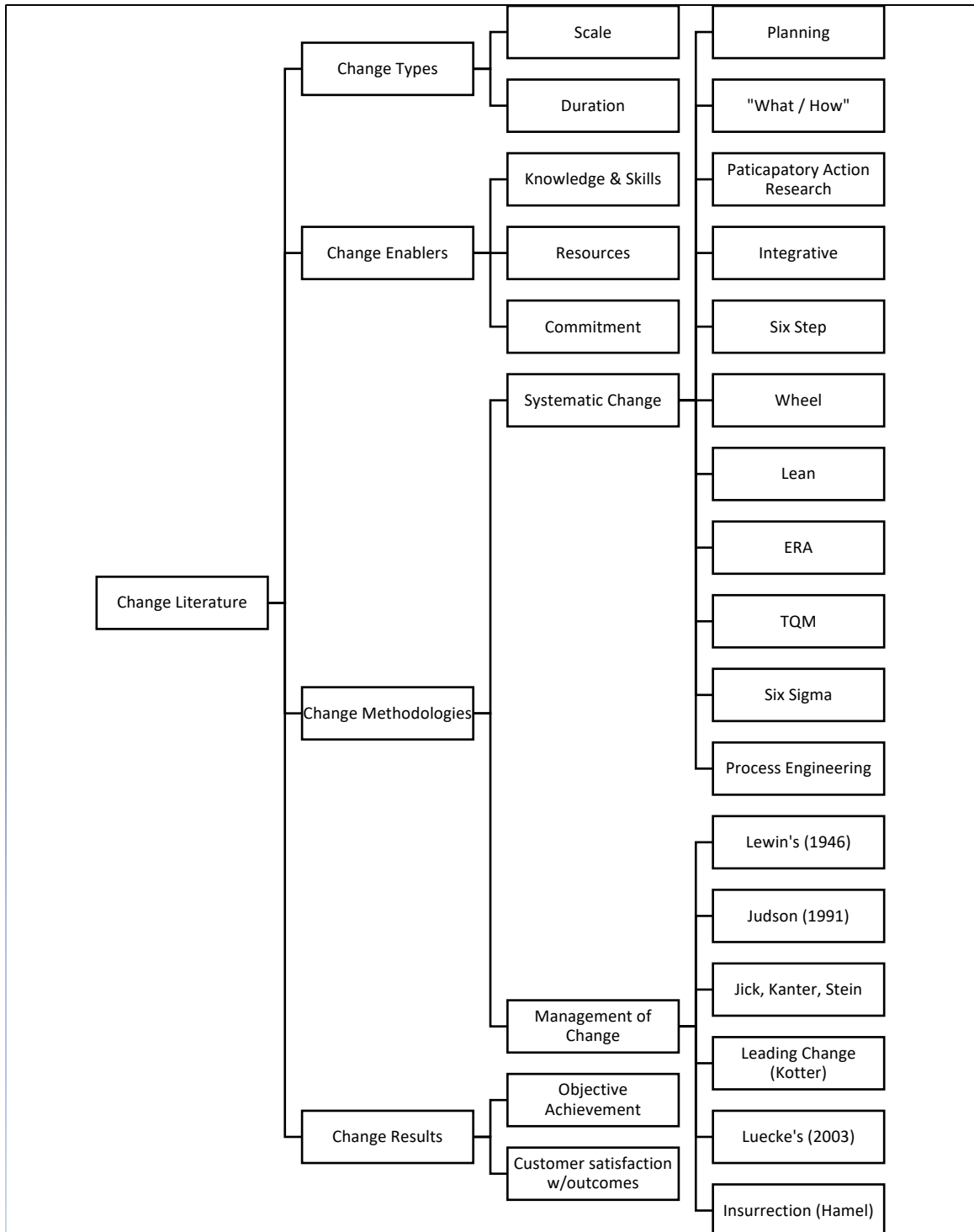


Figure 6. Al-Haddad and Kotnour's four-part change literature taxonomy. Adapted from "Integrating the Organizational Change Literature: A Model for Successful Change," by S. Al-Haddad and T. Kotnour, 2015, *Journal of Organizational Change Management*, 28(2), p. 242.



the new changes to ensure they become permanent (i.e., stabilize/reinforce the new organizational state; Lewin, 1947).

Current authors such as John Kotter, Dean Anderson, and Linda Ackerman-Anderson have integrated and elaborated on Lewin’s (1947) three organizational change components in the development of their change processes. Table 19 is a summary listing of several organizational change processes found within the academic and business literature.

Table 19

*Organizational Change Processes Summary Listing*

Lewin	Kotter	Anderson and Ackerman-Anderson
Unfreezing	Instill a sense of urgency	Preparation for leading the change
	Build a change team/coalition	Creation of a shared organizational vision
	Develop a change vision/strategy	Situation assessment/change design requirement determination
	Communicate/disseminate the change vision/strategy	Desired end state design/analysis impact
Moving	Empower action in others	Change implementation planning and organization
	Achieve/focus on short-term goals	Change implementation
Freezing	Incorporate gains/instill more change initiatives	Celebrating the new change state
	Reinforce new organizational changes	Feedback/analysis/adjustment as required

*Note.* Adapted from *Can Organizational Change Be Sustained? A Qualitative Study of Embedding Organizational Change Within the Context of Public Service* (Doctoral dissertation, pp. 26-33), by D. Haringa, 2009, ProQuest Dissertations and Theses database (UMI No. 3378876); “Frontiers in Group Dynamics: Concept, Method and Reality in the Social Science; Social Equilibria and Social Change,” by K. Lewin, 1947, *Human Relations*, 1(1), pp. 34; *Leading Change*, by J. P. Kotter, 1996, Boston, MA: Harvard Business School Press; *The Heart of Change: Real-Life Stories of How People Change Their Organizations*, by J. P. Kotter and D. S. Cohen, 2002, Boston, MA: Harvard Business School Press; *The Heart of Change Field Guide: Tools and Tactics for Leading Change in Your Organization*, by D. S. Cohen, 2005, Boston, MA: Harvard Business School Press; *The Change Leader’s Roadmap: How to Navigate Your Organization’s Transformation* (2nd ed.), by L. Ackerman-Anderson and D. Anderson, 2010, San Francisco, CA: Pfeiffer; and *Beyond Change Management: How to Achieve Breakthrough Results Through Conscious Change Leadership* (2nd ed.), by D. Anderson and L. Ackerman-Anderson, 2010, San Francisco, CA: Pfeiffer.

**John Kotter's eight-stage change process.** *Leading Change*, Kotter's 1996 book, presented an eight-stage change process for organizational change initiatives (Appelbaum et al., 2012; Cohen, 2005; Kotter, 1996; Little, 2014). Kotter's change process model was developed based on his extensive business and research experience (Appelbaum et al., 2012). The eight-stage change process as presented by Kotter (1996) is listed below:

1. Establishing a Sense of Urgency . . .
2. Creating the Guiding Coalition . . .
3. Developing a Vision and Strategy . . .
4. Communicating the Change Vision . . .
5. Empowering Broad-Based Action . . .
6. Generating Short-Term Wins . . .
7. Consolidating Gains and Producing More Change . . .
8. Anchoring New Approaches in the Culture (p. 21)

Appelbaum et al. (2012) stated that the academic literature contains significant research addressing each of Kotter's eight steps; however, there is a paucity of studies encompassing all eight of Kotter's change process steps. Kotter's (1996) seminal work, *Leading Change*, has been identified as one of the most influential books in identifying the requisite steps for successful organizational change (Burnes, 2003). Finally, Gilley et al. (2009) stated that Kotter's eight-stage model presents the "importance of leadership and vision, forming guiding coalitions, communicating, motivating and empowering others, and anchoring new approaches in the firm's culture" (p. 78).

**Anderson and Ackerman-Anderson's change leader's roadmap.** Anderson and Ackerman-Anderson developed a nine-phase change process model that they called the change leader's roadmap (Ackerman-Anderson, 2016; Ackerman-Anderson & Anderson, 2010; D. Anderson & Ackerman-Anderson, 2010). The change leader's roadmap is a task-driven change process model integrating three key change elements: content, people, and process (D. Anderson & Ackerman-Anderson, 2010). The nine stages of the change leader's roadmap are listed below:

1. Prepare to Lead the Change
2. Create Organizational Vision, Commitment, and Capability
3. Assess the Situation to Determine Design Requirements
4. Design the Desired State
5. Analyze the Impact
6. Plan and Organize for Implementation
7. Implement the Change
8. Celebrate and Integrate the New State
9. Learn and Course Correct (Ackerman-Anderson & Anderson, 2010, p. 23)

In its purest form, the change leader's roadmap is a set of tools for change leaders to facilitate the transition, or transformation, of an organization from its present state to a new desired state (Ackerman-Anderson & Anderson, 2010).

### **Organizational Resistance to Change**

Luecke (2003) warned, "Any time people perceive themselves as losers in a change initiative, expect resistance" (p. 74). K. Williams (2014) added, "People naturally resist change" (p. 8). Resistance to change has been described in a multitude of ways. It

has been described as a psychological phenomenon, an inevitable occurrence, universal in nature, a personality characteristic, and nothing more than a barrier to overcome (Blanchard et al., 2009; Carr, Hard, & Trahant, 1996; Robison, 2011; Strebel, 1998).

The origins of research on organizational resistance to change can be traced back to a 1948 study by Coch and French titled “Overcoming Resistance to Change” (Bareil, 2013; Burnes, 2015; Ijaz & Vitalis, 2011; Piderit, 2000). Other authors have credited Lewin’s “Frontiers in Group Dynamics” as the origin of literature on organizational resistance to change (Burnes, 2015; Burnes & Cooke, 2012; Dent & Goldberg, 1999).

There are numerous definitions, and derivations thereof, of organizational resistance to change throughout the academic literature. *The SAGE Glossary of the Social and Behavioral Sciences* provided the following characterization/definition of organizational resistance to change:

Individuals and systems generally seek stability and attempt to avoid the disequilibrium of imposed change. Resistance can be active or passive, overt or covert. Fear of the unknown, loss of status, and disruption of routine are some reasons for resistance. (Sullivan, 2009, p. 448)

Another characterization stated that “resistance to change occurs because recipients bring their own interests, goals, and group memberships to the change table” (Kanter et al., 1992, pp. 16-17). Organizational resistance to change has been defined as those behaviors and psychological courses of action undertaken to disrupt, oppose, and alter organizational transformation (Broner, 2003; Jenks, 1990). Finally, one of the earliest definitions of organizational resistance to change stated that such resistance protects

individuals concerned with real or imagined change (Dent & Goldberg, 1999; Zander, 1950).

Any organizational change initiative that alters the status quo can result in organizational resistance to change (Blanchard et al., 2009; Burnes, 2015; Furst & Cable, 2008; Robison, 2011). Utilizing slightly different terminology, Kotter (1998) stated that organizational resistance to change begins simply with the inability of organizational leadership to motivate employees to leave their “comfort zones” (p. 4). Goss, Pascale, and Atmos (1998) stated that organizational resistance to change begins with organizational leadership’s inability to understand the significant impacts the proposed organizational change(s) will have on employees, resulting in employee indifference to the change initiative(s). Kegan and Lahey (2002) stated that perceived organizational resistance to change is a “kind of personal immunity to change” (p. 38). Kegan and Lahey further stated that this reaction by employees impacted by organizational change efforts is the result of a conflict between organizational and personal commitment to change. Sull (2002) referred to organizational resistance to change as “active inertia” and explained that “active inertia is an organization’s tendency to follow established patterns of behavior—even in response to dramatic environmental events” (p. 85). Luecke (2003) identified organizational resistance to change as originating out of employees’ beliefs that the proposed organizational change will adversely impact their organizational standing, accumulated perks, and/or status. Furthermore, Luecke identified employees’ fearing a diminishment of their highly specialized skill sets following a change initiative as an additional factor resulting in resistance to change. Taking a contrasting viewpoint,

Heifetz and Linsky (2002) stated that “people do not resist change, per se. People resist loss” (p. 11).

Resistance to change has been identified as a key factor leading to the failure or success of organizational change efforts (Carr et al., 1996; Gibbons, 2015; Senge et al., 1999; Waddell & Sohal, 1998). Gibbons (2015) stated that resistance to change has two central, or key, components: environmental volatility and reduced loyalty to the organization. Senge (1990) characterized resistance to change as

neither capricious nor mysterious. It almost always arises from threats to traditional norms and ways of doing things. Often these norms are woven into the fabric of established power relationships. The norm is entrenched because the distribution of authority and control is entrenched. Rather than pushing harder to overcome resistance to change, artful leaders discern the source of the resistance. (p. 88)

Strebel (1998) stated that a leading cause of organizational resistance to change is simply the fact that organizational leaders and managers view change differently than employees do. Organizational resistance to change is a “complex, multi-faceted phenomenon that is caused by a variety of factors” (Waddell & Sohal, 1998, p. 544). Lawler and Worley (2006) posited that organizational resistance to change can be displayed via a continuum with people inherently opposed to change on one end and individuals accepting of and thriving on change at the other end, with a normal distribution of others in between. In a similar vein, Hutton (1994) stated that at the beginning of a change initiative, there will be “pockets of entrenched resistance, as well as groups of enthusiasts” (p. 164). Robison (2011) stated that there will be organizational members who willingly embrace change

while, simultaneously, there will be organizational members terrified of any change initiative. Kotter (1995, 2007) and Self and Schraeder (2009) described organizational resistance to change as an “obstacle” inherent to the organization’s structure. Kanter et al. (1992) stated that individuals resist organizational change efforts for “reasonable and predictable reasons” (p. 380) such as loss of control, too much uncertainty, surprise, confusion, loss of face, concerns/fears about competence, more work, ripple effects, past resentments, and real threats.

### **Research on Organizational Resistance to Change**

The study, research, and analysis of organizational resistance to change is not a recent phenomenon. In an article in the *Harvard Business Review* first published in 1954, Harvard University Professor Paul R. Lawrence (1969) stated that “one of the most baffling and recalcitrant of the problems which business executives face is employee resistance to change” (p. 4). Over 80 years have passed since the publication of Professor Lawrence’s article, yet organizational leaders are still facing the same scourge that Professor Lawrence spoke about in 1954.

Bamford and Forrester (2003) identified cultural factors as the basis for organizational resistance to change while Edmonds (2011) stated that “fear of the unknown” (p. 349) leads to organizational resistance to change. J. D. Ford, Ford, and D’Amelio (2008) stated that organizational resistance to change can be viewed within the context of a dynamic relationship between three elements. The three elements and a brief description of each are provided below (J. D. Ford et al., 2008):

- recipient action: behaviors or communications occurring in response to a given change initiative and associated implementation;

- agent sense making: change “agents’ interpretations of and meanings given to actual or anticipated recipient actions as well as the actions agents take as a function of their own interpretations” (p. 370); and
- agent-recipient interactions: provides the contextual environment shaping and shaped by the first two elements.

Underdue Murph (2005), in her doctoral dissertation, identified these same three elements as complacency, resignation, and cynicism.

Author Peter Senge (1990), in his book *The Fifth Discipline: The Art and Practice of the Learning Organization*, stated that organizational resistance to change arises from a conflict between the change initiative and organizational norms currently in place (Underdue Murph, 2005). Kotter and Schlesinger (2008) identified four common reasons for organizational resistance to change: parochial self-interest, misunderstanding combined with a lack of trust, differing assessments of the change between managers and employees, and a low tolerance for change. In contrast, Manning (2012) stated that organizational resistance to change is a “highly rational” (p. 265) response to a change initiative given an individual’s particular perspective, objectives, values, experiences, and expertise. Also seeing resistance to change in a positive light, Ijaz and Vitalis (2011) stated that “dissent may actually play a positive role in organizations” (p. 112). In a similar vein, Piderit (2000) posited that researchers of organizational resistance to change “have largely overlooked the potentially positive intentions that may motivate negative responses to change” (p. 783). Additionally, Piderit concluded, “What some may perceive as disrespectful or unfounded opposition might also be motivated by individuals’ ethical principles or by their desire to protect the organization’s best



interests” (p. 785). Continuing in the psychological realm of organizational resistance to change, Broner (2003) identified three factors resulting in organizational resistance to change: low levels of tolerance for change, the belief that organizational change initiatives lead to job insecurity, and a high level of mistrust in management’s intentions. Finally, Oreg and Berson (2011) identified a personality trait, “dispositional resistance to change” (p. 633), as being correlated to an individual’s orientation toward change.

In other research, Nadler and Tushman (1995) identified two sources of organizational resistance to change. The first derives from a strong ideological or emotional attachment to existing organizational culture or past organizational traditions. The second source of organizational resistance to change is the fear that arises surrounding the uncertainty of the prospective future wrought by the organizational change initiative (Nadler & Tushman, 1995). Appelbaum et al. (2015b) identified several key factors contributing to organizational resistance to change: varying levels of anxiety derived from the change action, employees’ attitudes toward change, employee commitment, the perceived benefits of the proposed change, and organizational change involvement. Self and Schraeder (2009) described organizational resistance to change via three domains: personal factors, organizational factors, and change-specific factors. The personal-factors domain encompasses individual issues, attributes, and tendencies leading to a dislike for change, and individuals’ concerns and fears over challenges in the external environment. The organizational-factors domain consists of the organization’s change history and the credibility of the organization and change agent. The third, and final, domain is concerned with the perception of the change being applicable, or even needed, for the organization; the belief that the change initiative planning was inherently

flawed; and concerns about the individual impact of the change initiative (Self & Schraeder, 2009). Finally, Klonek, Lehmann-Willenbrock, and Kauffeld (2014) explored the verbal cues and behaviors of change agents and how these verbal cues and behaviors trigger organizational resistance to change in organizational members (see also J. D. Ford et al., 2008).

Umble and Umble (2014) stated that resistance to change is, at its most base element, about uncertainty. This uncertainty within the organization leads to fear, both perceived and real, of threats to individual status or job security within the organization, and the resultant fear leads to resistance against organizational change initiatives (Umble & Umble, 2014). To further differentiate organizational resistance to change, Umble and Umble described three broad areas of organizational resistance to change: disagreement about the problem, disagreement about the solution, and disagreement about the implementation. Umble and Umble further segregated these three broad areas of organizational resistance to change into seven “layers of resistance to change” (p. 19). Table 20 provides a summary listing of the three broad areas of organizational resistance to change and the seven layers representing specific types of organizational resistance to change as described by Umble and Umble. For organizations to overcome organizational resistance to change, a sequential process approach stepping through the seven layers of resistance to change should be followed to ensure change initiative success (Umble & Umble, 2014).

Table 20

*Seven Layers of Resistance to Change*

Area of resistance to change	Layer of resistance to change
Disagreement about the problem	1. Disagreement that a problem even exists 2. Disagreement about the true nature of the stated problem
Disagreement about the solution	3. Disagreement about the direction of the chosen solution 4. Disagreement about the specifics of the chosen solution 5. Support of the chosen solution, but the solution has adverse consequences/side effects
Disagreement about the implementation	6. Disagreement that the chosen solution can/will be successfully implemented 7. Unknown/unspoken/unresolved reservations of organizational members

*Note.* Adapted from “Overcoming Resistance to Change,” by M. Umble and E. Umble, 2014, *Industrial Management*, 56(1), 19-21.

### **Overcoming Organizational Resistance to Change**

The academic and business literature is replete with strategies to overcome organizational resistance to change. These approaches are diverse and varied in the proposed strategies to overcome resistance to change. There are approaches focusing on organizational systems (Coch & French, 1948; Kotter, 1995; Lewin, 1947), a person-centric approach (J. D. Ford et al., 2008; Oreg & Berson, 2011; Self & Schraeder, 2009; Zander, 1950), and a combination approach of the two (Lawrence, 1969). In a study of the origins of the term *organizational resistance to change*, Dent and Goldberg (1999) found that three out of five of the earliest studies had the phrase *overcoming resistance to change* in their titles. Lozano (2013) identified three levels of barriers to change and associated strategies to overcome these barriers. Table 21 provides a synthesized listing of Lozano’s identified barriers to change and associated strategies for overcoming organizational resistance to change. Finally, Lozano posited that there is a disconnect or “incongruity” (p. 292) between the identified sources of organizational resistance to

change and the strategies implemented to overcome this resistance to change. The remainder of this section presents organizational strategies that have been proposed to overcome resistance to change.

Table 21

*Three Levels of Barriers to Change and Associated Strategies*

Level	Barrier to change	Strategy
Individuals	Lack of communication/misunderstanding	Participation
	Lack of trust	Negotiation
	Change in job security/status	Manipulation
Groups	Group culture/group norms	Whole-group participation in change initiative
	Group institutions ignored	Group–individual interaction
	Group–individual conflict	Change in group values/norms
Organizations	Long-term plans/strategic planning not in place	New/revised strategies, policies, and frameworks
	Patriarchal/bureaucratic organizational structures	Change champions identified
	Lack of support from top management/organizational leadership	Collaboration/merging of efforts

*Note.* Adapted from “Are Companies Planning Their Organisational Changes for Corporate Sustainability? An Analysis of Three Case Studies on Resistance to Change and Their Strategies to Overcome It,” by R. Lozano, 2013, *Corporate Social Responsibility and Environmental Management*, 20(5), p. 280; and *Orchestrating Organizational Change for Corporate Sustainability: Strategies to Overcome Resistance to Change and to Facilitate Institutionalization* (Doctoral thesis, p. 122), by R. Lozano, 2009, ProQuest Dissertations and Theses database (UMI No. U584364).

Luecke (2003) identified six strategies to be utilized by change agents/leaders to overcome organizational resistance to change. Listed below are Luecke’s six strategies:

1. Always be prepared to address the central question, “Where and how will change manifest itself resulting in organizational challenges, pain, or loss?”
2. Early in the change initiative, identify the individuals at risk of losing something important to them. Anticipate and plan for their reactions to the change initiative.

3. Communicate why it is essential to make the proposed organizational change, focusing on potential and expected resisters. Explain and describe the urgency necessitating a shift from the status quo and deviation from organizational norms.
4. Highlight the benefits of the proposed change to potential and expected resisters. Focus on the improvements to job security, pay, and benefits. Placing the focus on the perceived benefits shifts the organizational change conversation from a negative paradigm to a positive paradigm.
5. If necessary, enable and support the resisters in their efforts to find new positions within the organization, ensuring the new positions minimize any losses accrued due to the change in position.
6. Make the resisters and potential resisters part of the change initiative. If the resisters participate and see what is truly occurring, vice inaccurate perceptions and innuendo, they will be able to maintain more control over their future, reducing their levels of resistance.

If the above strategies fail to convince the resistor(s) of the efficacy of the change initiative, it is imperative that the organizational leadership move the individual(s) out of the change-initiative sphere of influence. Leaving an individual opposed to the change initiative in that sphere of influence risks failure of the change initiative (Luecke, 2003). Luecke “believed that seeing change as an opportunity and not as a threat allows it to succeed and sink deeply within the organizational culture” (Al-Haddad & Kotnour, 2015, p. 250). Finally, the Luecke method focuses on the reactions of organizational members to proposed change initiatives, allowing managers and change agents to facilitate

organizational members' acceptance of change (Al-Haddad & Kotnour, 2015; Luecke, 2003).

Organizational change, and the accompanying organizational resistance to change, will continue to occur on a daily basis. To ensure the success of organizational change initiatives, organizations must continually plan for change, anticipate the challenges associated with a given change initiative, and adopt a structured methodological change process to ensure the desired outcome is achieved (Al-Haddad & Kotnour, 2015). The final topic section of the literature review, Transformational Leadership, is presented next.

### **Transformational Leadership**

According to Avolio (2010), "Transformational leadership positively engages individuals at all levels of just about every type of organization" (p. 742). Gardner (2006) stated,

The transformational leader creates a compelling narrative about the missions of her organization or policy, embodies that narrative in her own life, and is able, through persuasion and personal example, to change the thoughts, feelings, and behaviors of those whom she seeks to lead. (p. 7)

Bass (1996) added, "Transformational leadership is conceived as charismatic in attribution or behavior, intellectually stimulating, or individually considerate" (p. 3).

Fischer (2017) stated that transformational leadership is a stabilizing, engaging, and unifying force in the workplace. Transformational leaders influence and motivate their subordinates while achieving shared organizational vision and goals. Hameiri and Nir (2016) stated that transformational leadership "promotes followers' work engagement,

limiting the need for external control” (p. 775). Bass (1996) stated that transformational leadership results in organizational members exceeding expected performance metrics while Shelton (2012) stated that transformational leadership’s inner core is about change. This inner core of change instills a changing effect throughout the organization.

### **Transformational Leadership Definition**

Transformational leadership has been defined as a “style of leadership in which the leader identifies the needed change, creates a vision to guide the change through inspiration, and executes the change with the commitment of the members of the group” (“Transformational Leadership,” n.d., para. 1). Bass and Bass (2008) defined transformational leadership as leadership in which “the leader elevates the follower morally about what is important, valued, and goes beyond the simpler transactional relationship of providing reward or avoidance of punishment for compliance” (p. 1217). Northouse (2007) stated that transformational leadership is a process in which engagement between a leader and followers results in increased levels of motivation and morality in both parties involved. Transformational leadership “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; see also Bass & Bass, 2008; Meredith, 2008; Yahaya & Ebrahim, 2016). Utilizing the moniker *charismatic leadership*, Berlew (1974) stated that when leadership creates an environment that strengthens the organization’s members, this new environment leads to a collective belief that the organizational course of events can be altered, resulting in increased levels of organizational excitement. Shelton (2012) described transformational leadership as “a

partnership to reach a higher level of motivation, trust, engagement, and empowerment” (p. 1).

Transformational leadership has also been defined as “the comprehensive and integrated leadership capacities required of individuals, groups, or organizations to produce transformation as evidenced by step-functional improvement” (Hacker & Roberts, 2004, p. 3). Ely and Rhode (2010) posited that transformational leaders “emphasize gaining the trust and confidence of followers and empowering them to develop their own potential” (p. 384). Poutiatine (2009) defined transformational leadership as “how we lead the self, individuals, and organizations through the process of transformation” (p. 190). Dobbs and Walker (2010) depicted transformational leadership via five skill sets: build a better, stronger culture; improve esprit de corps; communicate issues, challenges, and actions effectively; positively change the financial results; and leave behind a cadre of future transformational leaders. Yukl (2006) described transformational leadership as leadership in which “the followers feel trust, admiration, loyalty, and respect toward the leader, and they are motivated to do more than they originally expected to do” (p. 262). Kim (2003) characterized transformational leadership

as a higher form of leadership that occurs when leaders demonstrate the ability to motivate others to perform beyond expectations by defining shared values and beliefs, enabling followers to develop a mental picture of a shared vision and transform purpose into action. (p. 32)



In his 2003 book, *Transforming Leadership*, Burns stated that transformational leadership is participatory, democratic, liberating, and empowering. Burns (2003) further characterized transforming leadership as causing

a metamorphosis in form or structure, a change in the very condition or nature of a thing, a change into another substance, a radical change in outward form or inner character, as when a frog is transformed into a prince or a carriage maker into an auto factory. It is change of this breadth and depth that is fostered by transforming leadership. (p. 24)

Finally, Burns stated that “transforming leaders define public values that embrace the supreme and enduring principles of a people” (p. 29).

### **Historical Underpinnings of Transformational Leadership**

Leadership research and theory is an evolutionary process that has been occurring for the past 100-plus years. Transformational leadership theory is just one of the latest incarnations of leadership theory contributing to the academic body of knowledge. The past 100-plus years have seen the introduction of new leadership theories; extensive research efforts around each new theory; the maturation of each new theory; and, in some cases, the replacement of the leadership theory by the next leadership theory entering the scholarly arena (*The Transformational Leadership Report*, 2007). In some cases, older leadership theories, such as trait theory, have had a resurgence in the academic literature as researchers revisit the theories. This cycle has been repeated several times since the early 1900s.

**Great-man leadership.** The great-man leadership paradigm is most closely related to the works of philosopher and historian Thomas Carlyle (L.-V. Cox, 2016;

Underdue Murph, 2005). The great-man leadership paradigm centered on a belief that leadership was an art and that certain individuals—the elites, aristocracy, or heroes—were born to be leaders (Bass & Bass, 2008; Brown, 2012; Kirkpatrick & Locke, 2010; *The Transformational Leadership Report*, 2007). Leadership was perceived to be an innate talent for these leaders (Hoover, 1987). A central premise of the great-man paradigm was the belief that the actions and leadership of great men shaped history (Bass & Bass, 2008; Underdue Murph, 2005). Dowd (1936, as cited in Bass & Bass, 2008) stated,

There is no such thing as leadership by the masses. The individuals in every society possess different degrees of intelligence, energy, and moral force, and in whatever direction the masses may be influenced to go, they are always led by the superior few. (p. 49)

**Trait leadership.** The field of trait leadership grew out of and was a successor to the great-man leadership paradigm. Adherents to the field of trait leadership attempted to compile a list of common traits found within great leaders. Glynn and DeJordy (2010) noted, “Leaders could seemingly accomplish what others could not: they could lead” (p. 122). This belief in specific and identifiable traits suggested that leaders were born with an innate leadership ability (Bass, 1996; *The Transformational Leadership Report*, 2007; Yukl, 2006). Trait leadership research during this period centered on two predominant questions: First, what particular traits differentiated leaders from nonleaders? Second, what was the extent to which leaders and nonleaders differed in the identified traits (Bass & Bass, 2008)? During this period, various lists of leadership traits were compiled by researchers such as Bird (1940), Smith and Krueger (1933), and W. O.

Jenkins (1947; all as cited in Bass & Bass, 2008). For example, a leadership trait list compiled by Bird (1940, as cited in Bass & Bass, 2008) consisted of 79 identified leadership traits.

Ralph Stogdill conducted extensive research concerning trait leadership via two extensive studies in 1948 and 1974 (Curphy, 1991; Underdue Murph, 2005; K. Williams, 2014; Yukl, 2006). Stogdill identified a number of critical leadership traits: dependability, assertiveness, high energy, cooperativeness, self-confidence, dominance, achievement orientation, stress tolerance, cleverness, responsibility, adaptability, organizational and speaking skills, social skills, and persuasiveness (Glynn & DeJordy, 2010; Stogdill, 2010). Yukl (1989) stated that trait leadership research is remiss in measuring leadership behavior and influence even when faced with data showing that these same factors impact the effects of these leadership traits. Due to an inability to positively identify universal leadership traits, the focus of academic researchers began shifting to leadership behaviors in the mid-1950s (Glynn & DeJordy, 2010; Kirkpatrick & Locke, 2010; K. Williams, 2014; Yukl, 2006). Table 22 is a summary listing of identified leadership traits from earlier trait leadership studies.

In recent years, the field of trait leadership has had a resurgence of academic interest predominantly supported by the works of Lord, DeVader, and Alliger; Kirkpatrick and Locke; and Zaccaro, Kemp, and Bader (Northouse, 2013). Table 23 is a summary listing of identified leadership traits from more recent studies exploring trait leadership.

Table 22

*Summary Listing of Early Studies Identifying Leadership Traits*

Stogdill (1948)	Mann (1959)	Stogdill (1974)
Intelligence	Intelligence	Achievement
Alertness	Masculinity	Persistence
Insight	Adjustment	Insight
Responsibility	Dominance	Initiative
Initiative	Extraversion	Self-confidence
Persistence	Conservatism	Responsibility
Self-confidence		Cooperativeness
Sociability		Tolerance
		Influence
		Sociability

*Note.* Adapted from *Leadership: Theory and Practice* (6th ed., pp. 20-23), by P. G. Northouse, 2013, Thousand Oaks, CA: SAGE.

Table 23

*Summary Listing of Recent Studies Identifying Leadership Traits*

Lord, DeVader, and Alliger (1986)	Kirkpatrick and Locke (1991)	Zaccaro, Kemp, and Bader (2004)
Intelligence	Drive	Cognitive abilities
Masculinity	Motivation	Extraversion
Dominance	Integrity	Conscientiousness
	Confidence	Emotional stability
	Cognitive ability	Openness
	Task knowledge	Agreeableness
		Motivation
		Social intelligence
		Self-monitoring
		Emotional intelligence
		Problem solving

*Note.* Adapted from *Leadership: Theory and Practice* (6th ed., pp. 20-23), by P. G. Northouse, 2013, Thousand Oaks, CA: SAGE.

**Behavior (behavioral) leadership.** Unlike trait leadership theory, which postulated that leaders were born with innate leadership abilities, behavior leadership theory focused on the actual behavior of leaders and their interactions with/to subordinates in diverse settings (Northouse, 2013; Underdue Murph, 2005; Yukl, 1989, 2006). Northouse (2013) and Underdue Murph (2005) referred to behavior leadership as

the style approach. K. Williams (2014) identified behavior leadership as being focused on specific leadership behaviors with the assumption that leaders exhibiting those same behaviors would be successful. Yukl (2006) identified two broad categories of behavior leadership research. The first broad category of behavior leadership research focused on what leaders did concerning how they spent their time throughout the day; daily patterns, functions, and responsibilities; and coping mechanisms to deal with job demands, conflicts, and constraints. The second area of behavior leadership research focused on ascertaining and identifying “effective leadership behavior” (Yukl, 2006, p. 13). Northouse (2013) referred to these two broad research categories as “task behaviors and relationship behaviors” (p. 75) while Glynn and DeJordy (2010) referred to them as “task orientation” (p. 122) and “people orientation” (p. 123).

Extensive behavior leadership research was conducted at Ohio State University and the University of Michigan in the late 1940s and 1950s (Northouse, 2013; Schriesheim & Bird, 2010; Underdue Murph, 2005; Yukl, 1989). Two separate and distinct leadership behaviors were identified from the Ohio State University research efforts: initiating structure and consideration (Curphy, 1991; Ghasabeh, Reaiche, & Soosay, 2015; Northouse, 2013; Stirling, 1997). Northouse (2013) stated that initiating structure, or task behaviors, refers to the way in which “leaders provide structure for subordinates” while they also “nurture them” (p. 77). Consideration, or relationship behaviors, addresses a leader’s role in “building camaraderie, respect, trust, and liking between leaders and followers” (Northouse, 2013, p. 76). The Ohio State University leadership studies are credited with moving leadership research from a trait-based orientation to a behavioral one (Schriesheim & Bird, 2010).

The University of Michigan behavior leadership studies were being conducted concurrently with the Ohio State University studies. However, the focus of the University of Michigan studies was the impact of leadership behavior on subordinates in small-group settings (Hoover, 1987; Yukl, 2006). The result of the University of Michigan behavior leadership studies was the development of a two-factor model (Maslanka, 2004; Northouse, 2013). The two factors, employee orientation and production orientation, were similar to the two factors identified via the Ohio State University research previously discussed (Northouse, 2013; Underdue Murph, 2005). Employee orientation addressed a leader's behavior when approaching subordinates. A human relations orientation characterized this factor (Northouse, 2013; Underdue Murph, 2005). It also closely approximated the consideration factor from the Ohio State University studies (Northouse, 2013). The production orientation was concerned with the production and technical aspects of the organization (Northouse, 2013; Underdue Murph, 2005). Like the employee orientation, the production orientation also closely approximated a finding from the Ohio State University studies—in this case, the initiating structure finding (Northouse, 2013).

Other key behavior leadership researchers include Lewin, whose research identified three distinct leadership paradigms: autocratic leadership, democratic leadership, and laissez-faire leadership (R. K. White & Lippitt, 2010; K. Williams, 2014); Blake and Mouton (2010), whose research focused on managers' use of task behaviors and relationship behaviors in various organizational settings and produced a managerial management model, the managerial grid; and McGregor, whose research resulted in the

concept of Theory X and Theory Y managers (Barrett, 2007; Bass & Bass, 2008; Northouse, 2013).

**Situational/contingency leadership.** Situational/contingency leadership research attempted to ascertain which leadership behaviors worked best for given situations and contexts (Bass & Bass, 2008; Northouse, 2013; *The Transformational Leadership Report*, 2007). This leadership approach arose from the late-1960s research efforts of Hersey and Blanchard (Northouse, 2013), who stated that behavioral studies “tend to show that there is no normative (best) style of leadership, that successful leaders are those who can adapt their leader behaviors to meet the needs of their followers and the particular situation” (Hersey & Blanchard, 2010, p. 297). Northouse (2013) explained, “The premise of the theory is that different situations demand different kinds of leadership” (p. 99). Similar to the rise of behavior leadership theories as a result of perceived shortcomings of prevailing trait theories, situational/contingency leadership approaches arose as a result of perceived shortcomings within the behavior leadership paradigms. Ghasabeh et al. (2015) stated that situational/contingency leadership “was developed to highlight the importance of situational factors and how they impact the effectiveness of leadership” (p. 462). Additionally, Yukl (2006) stated that situational/contingency leadership is comprised of “situational variables” (p. 14) such as the type of work being performed, the characteristics of the subordinates involved, the organizational type, and the external environment (Yukl, 1989). It is these situational variables that define the leader’s leadership approach and actions. Northouse (2013) identified several strengths and weaknesses of situational/contingency leadership. Table 24 summarizes these strengths and weaknesses according to Northouse.

Table 24

*Situational/Contingency Leadership Strengths and Weaknesses According to Northouse*

Strengths	Weaknesses
1. Marketplace proven	1. Limited research studies have been conducted to prove the veracity of stated propositions and assumptions
2. Practical; easy to understand and apply	2. Model of subordinate development levels is ambiguous
3. Prescriptive in nature	3. The handling of commitment conceptualizations within the approach is ambiguous
4. Allows for leader flexibility	4. Validity has not been proven
5. Emphasizes that individuals are unique with each requiring a unique leadership approach	5. Fails to address the impact of demographic characteristics
	6. Does not address leader/subordinate vs. leader/group leadership in an organizational environment
	7. Associated questionnaires force respondents to utilize limited set of responses for given situation(s)

*Note.* Adapted from *Leadership: Theory and Practice* (6th ed., pp. 105-109), by P. G. Northouse, 2013, Thousand Oaks, CA: SAGE.

Several situational/contingency leadership models have been developed and advocated over the past 60-plus years. Robert Tannenbaum and Warren H. Schmidt's continuum of leadership model (Bass & Bass, 2008; Lorsch, 2010; Tannenbaum & Schmidt, 2010; K. Williams, 2014), Victor H. Vroom and Phillip W. Yetton's normative decision model (Bass & Bass, 2008; Northouse, 2013; Vroom & Jago, 2010; Yukl, 2006), G. Jago's revised normative decision model (Bass, 1996; Bass & Bass, 2008; Vroom & Jago, 2010; Yukl, 2006), Robert J. House's path-goal theory (Bass, 1996; Bass & Bass, 2008; House, 2010; Yukl, 1989), William J. Reddin's 3D theory of managerial effectiveness (Bass & Bass, 2008; Hoover, 1987; Northouse, 2013; Reddin, 2010), Fred Fiedler's least preferred coworker (LPC) contingency theory (Ayman, Chemers, & Fiedler, 2010; Bass & Bass, 2008; Glynn & DeJordy, 2010; Lorsch, 2010), and Hersey



and Blanchard's situational leadership model (Bass & Bass, 2008; Maslanka, 2004; Merritt, 2000; Yukl, 1989) are representative samples of situational/contingency leadership models. However, situational/contingency leadership research efforts were eclipsed by the introduction and development of transformational leadership models in the early to mid-1980s.

### **Transformational Leadership Theory Development**

The term *transformational leadership* originated with the work of sociologist James V. Downton in his 1973 book, *Rebel Leadership: Commitment and Charisma in a Revolutionary Process* (Bass & Bass, 2008; Harris, 2015; Platt, 2015; *The Transformational Leadership Report*, 2007). In contradiction to this viewpoint, Kull (2003) identified an article in the 1974 edition of the *California Management Review*, authored by David E. Berlew, as the origin of the term *transformational leadership*. Regardless of the origin of the initial terminology, the origins of transformational leadership academic literature are found in the seminal leadership works of Burns, Bass, and Avolio (Flores, 2015; Harris, 2015; Stewart, 2006). Burns first presented the theory of transformational leadership in his 1978 book, *Leadership* (Bass & Bass, 2008; Platt, 2015; Shelton, 2012; Yukl, 2006). While Burns's work was the foundational source of transformational leadership theory, it was the work of Bass and Avolio that firmly cemented its position in the business and academic research realms. Bass and Avolio's work served to address the identified limitations and omissions of Burns's prior work (Bass, 1990, 1996; Stewart, 2006; Yukl, 1989). Today, transformational leadership contextual research exists in various settings including business (Boone, 2015; Crowley, 2011; Dobbs & Walker, 2010; Fullan, 2001), doctoral research (Flores, 2015; Harris,

2015; Kull, 2003; Platt, 2015), education (Fischer, 2017; Hameiri & Nir, 2016; Leithwood, 1994), and the U.S. Department of Defense (Bass, 1996; Smith, 2010), to list just a few.

### **Transformational Leadership Characteristics/Traits**

Bass (1993, as cited in Bass & Bass, 2008) identified transformational leadership as a “seminal shift” in leadership research (p. 619). Transformational leadership has been at the forefront of academic research since the mid-1980s, continuing to today (Bono & Judge, 2004; Ghasabeh et al., 2015; Stewart, 2006; Yahaya & Ebrahim, 2016). As a result of this intense academic interest, numerous transformational leadership models and accompanying identified traits have been developed since Burns’s first introduction of transformational leadership theory. Transformational leadership traits and characteristics identified by Burns, Bass, and Kouzes and Posner are discussed below.

**Burns’s transformational leadership.** Burns (1978) identified three central traits of a transformational or transforming leader: idealized influence, idealized behaviors, and inspirational motivation (Bass & Bass, 2008).

***Idealized influence.*** A transforming leader increases followers’ awareness and consciousness of organizational outcomes and the increased value of the proposed means of achieving these new organizational outcomes (i.e., transcendent goals; Bass, 1996; Bass & Bass, 2008; Burns, 1978).

***Idealized behaviors.*** A transforming leader can get his or her followers to place the organization’s interests above their own self-interests (i.e., the greater good; Bass, 1996; Bass & Bass, 2008; Burns, 1978).

***Inspirational motivation.*** A transforming leader can increase a follower's level of need on Maslow's hierarchy of needs above the lower physiological, safety, belonging, and esteem levels (i.e., self-actualization; Bass, 1996; Bass & Bass, 2008; Burns, 1978).

Burns's characterization of transformational leadership was from both a moral and ethical viewpoint (McCormick, 2016; *The Transformational Leadership Report*, 2007; Yahaya & Ebrahim, 2016). In a subsequent work, Burns (2003) stated that "leadership is not only a descriptive term but a prescriptive one, embracing a moral, even a passionate dimension" (p. 2).

**Bass's transformational leadership.** Bass (1985, 1996) and Bass and Riggio (2006) identified four transformational leadership traits/characteristics: charismatic leadership or idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration (Bass & Bass, 2008; Judge & Piccolo, 2004; Northouse, 2013). These transformational leadership traits/characteristics are commonly referred to as the four *Is* of transformational leadership (Avolio, Waldman, & Yammarino, 1991; Bass & Avolio, 1990; L.-V. Cox, 2016; Steinwart & Ziegler, 2014).

***Charismatic leadership or idealized influence.*** This transformational trait/characteristic pertains to the degree to which a leader can influence the degree to which followers identify with that same leader's values and actions (Bass, 1990; Bass & Bass, 2008; Judge & Piccolo, 2004; Underdue Murph, 2005). The essence of idealized influence is that transformational leaders serve as role models for their followers (Bass & Riggio, 2006). Bass's concept of idealized influence is a derivation of House's 1977 charismatic leadership theory that posited followers are influenced by and attracted to the beliefs of the leader (Underdue Murph, 2005). As described in *The Transformational*

*Leadership Report* (2007), “Charismatic leaders display convictions, take stands, and appeal to followers on an emotional level” (p. 5). Leaders personifying idealized influence display “high standards of moral and ethical conduct, . . . are held in high personal regard, and . . . engender loyalty from followers” (Bono & Judge, 2004, p. 901).

***Inspirational motivation.*** Inspirational motivation refers to transformational leaders’ ability to articulate and inspire a compelling shared vision of the organizational goals and values while simultaneously instilling in their followers the motivation to place the organization’s interests first before their own self-interests (Bass & Bass, 2008; Bass & Riggio, 2006; Northouse, 2013; *The Transformational Leadership Report*, 2007). Northouse (2013) and Bass and Riggio (2006) stated that team spirit levels increase in the presence of this type of leadership. Finally, Yukl (2006) stated that transformational leaders personifying inspirational motivation can induce their followers to “transcend their own self-interest for the sake of the organization or team” (p. 262).

***Intellectual stimulation.*** Transformational leaders instill in their followers an increased level of awareness of problems and challenges, promote rationality and intelligence, and influence followers to view problems through a different lens and from differing perspectives (Bass & Riggio, 2006; Flores, 2015; Northouse, 2013; Yukl, 1989). Transformational leaders challenge prevailing assumptions, encourage risk taking, and reframe problems facing the organization (Bass & Riggio, 2006; Flores, 2015; Judge & Piccolo, 2004). Additionally, Ghasabeh et al. (2015) stated that intellectual stimulation increases organizational knowledge sharing while generating innovative ideas and solutions.

***Individualized consideration.*** Transformational leaders personifying individualized consideration engender an organizational climate that provides supportive, nurturing, and learning opportunities for their followers' personal and professional needs (Bass & Bass, 2008; Bass & Riggio, 2006; Northouse, 2013; Yahaya & Ebrahim, 2016). Transformational leaders serve as coaches, mentors, and advocates for their followers (Judge & Piccolo, 2004; Northouse, 2013; *The Transformational Leadership Report*, 2007).

Underdue Murph (2005) stated that charismatic leadership or idealized influence and inspirational motivation are a “manifestation of inherent characteristics” while “the latter two factors describe leader behavior in the form of actions” (p. 132).

**Other transformational leadership perspectives.** The works of Burns, Bass, and Bass and Avolio have informed, to a considerable extent, the field of transformational leadership. However, other researchers have made significant contributions to the transformational leadership literature (Bass & Bass, 2008; Fischer, 2017; Northouse, 2013). Kouzes and Posner's (2007) five fundamental practices, described in their book *The Leadership Challenge* and validated via the associated survey instrument, the Leadership Practices Inventory (LPI), have also informed the transformational leadership body of literature (Bass & Bass, 2008; Maslanka, 2004; Northouse, 2013). Bennis and Nanus identified three key transformational leadership traits: instilling a clear and compelling vision, developing commitment for the new vision, and institutionalizing the new vision (as cited in Bass & Bass, 2008; Curphy, 1991; Underdue Murph, 2005). Finally, in the business literature, Crowley (2011) identified four practices of transformational leaders: hiring people with heart, heart to

heart, empowering the heart, and inspiring the heart. Table 25 summarizes the transformational leadership traits identified in this literature review.

Table 25

*Transformational Leadership Characteristics Identified in the Literature*

Burns	Bennis & Nanus	Bass/ Bass & Avolio	Kouzes & Posner	Crowley
Idealized influence	Instill a clear and compelling vision	Charismatic leadership/ idealized influence	Model the way	Building an engaged team—hire people with heart
Idealized behaviors	Develop commitment to the new vision	Inspirational motivation	Inspire a shared vision	Connecting to followers on a personal level—heart to heart
Idealized motivations	Institutionalize the new vision	Intellectual stimulation	Challenge the process	Maximizing followers’ potential—empower the heart
		Individualized consideration	Enable others to act	Valuing/recognizing followers’ achievements—inspiring the heart
			Encourage the heart	

*Note.* Adapted from *Leadership*, by J. M. Burns, 1978, New York, NY: Harper & Row; *The Bass Handbook of Leadership: Theory, Research, and Managerial Applications*, by B. M. Bass and R. Bass, 2008, New York, NY: Free Press; “From Transactional to Transformational Leadership: Learning to Share the Vision,” by B. M. Bass, 1990, *Organizational Dynamics*, 18(3), p. 22; “Developing Transformational Leadership: 1992 and Beyond,” by B. M. Bass and B. J. Avolio, 1990, *Journal of European Industrial Training*, 14(5), p. 22; *Leadership: Theory and Practice* (6th ed.), by P. G. Northouse, 2013, Thousand Oaks, CA: SAGE; *The Leadership Challenge* (4th ed.), by J. M. Kouzes and B. Z. Posner, 2007, San Francisco, CA: Jossey-Bass; and *Lead From the Heart: Transformational Leadership for the 21st Century*, by M. C. Crowley, 2011, Bloomington, IN: Balboa Press.

**Transformational Change**

Types of change have been identified by numerous authors in the academic literature. Change has been identified as developmental, transitional, and transformational (Ackerman-Anderson & Anderson, 2010; D. Anderson & Ackerman-Anderson, 2010; Gilley et al., 2009; Harvey, 2014). Lawler and Worley (2006) identified transformational change, strategic adjustment, and strategic reorientations as three types

of change. Connors and Smith (2011) also presented three levels of change via their input/output change model, with transformational change described as a Level 3 change, identified as requiring “a significant shift in the way people think and act” (p. 54). Transformational change has been described as profound, irreversible, a metamorphosis, and a radical transition from one state to another (Gass, 2010). Poutiatine (2009) presented transformational change as leadership engaging at multiple organizational levels via a “meta-cognitive standpoint” (p. 191).

Transformational change has two components: “content (external, impersonal) and people (internal, personal)” (D. Anderson & Ackerman-Anderson, 2010, p. 40). Gilley et al. (2009) stated that transformational change is “disruptive in nature” (p. 76) while Haringa (2009) stated that the primary motivation behind transformational change is “either survival or breakthrough oriented” (p. 98). Utilizing a slight derivation of Gilley et al.’s position that transformation change is disruptive, Poutiatine (2009) stated that “transformational change is not constant, but rather starts, cycles, and stops in a somewhat predictable manner” (p. 193). Transformational change involves radical and substantive change to organizational systems, technologies, structures, and processes (Gilley et al., 2009; Sikdar & Payyazhi, 2014). Additionally, Haringa (2009) stated that transformational change is process oriented, affecting organizational mindset, behavior, and culture. Appelbaum et al. (2015b) posited that transformational change is a mechanism for senior organizational leadership to “challenge the status quo” (p. 136) whereas Harris (2015) stated that transformational change is a strategic organizational process.

Gass (2010) identified eight key characteristics of transformational change.

These eight key characteristics are listed below:

1. Transformational change is holistic . . .
2. Transformational change involves breakthroughs . . .
3. Transformation is about “Being the Change” . . .
4. Transformational change accentuates the positive . . .
5. Transformational change balances control with letting go . . .
6. Transformational change relies on collaboration . . .
7. Transformational change engages the heart . . .
8. Transformational change happens at all levels. (pp. 1-3)

In a similar vein, Poutiatine (2009) identified nine key transformational change principles. Poutiatine’s nine transformational principles are listed below:

1. Transformation is not synonymous with change.
2. Transformation requires assent to change.
3. Transformation always requires second-order change.
4. Transformation always involves all aspects of an individual’s, or organizations, life.
5. Transformational change is irreversible.
6. Transformational change involves a letting go of the myth of control.
7. Transformational change always involves some aspect of risk, fear, and loss.
8. Transformational change always involves a broadening of the scope of worldview.



9. Transformation is always a movement towards a greater integrity of identity—  
a movement toward wholeness. (pp. 192-193)

The 1978 introduction of transformational leadership by Burns was in and of itself a transformative event whose impacts are still felt today throughout academic institutions, government entities, and the corporate world of business.

### **Synthesis Matrix**

Appendix D contains a synthesis matrix encapsulating the significant themes and key tenets of the literature review presented in this chapter.

### **Summary**

This literature review presented six main topic areas: gated golfing communities within the Coachella Valley, the homeowners' association governance paradigm, demographics applicable to private communities, organizational change, resistance to organizational change, and transformational leadership. For each major topic area, applicable history, theory, and current research were provided and, where applicable, appropriate definitions were also provided. Additionally, several subtopics were presented for each major topic area. An apparent gap has been shown in the literature regarding the use of transformational leadership to overcome resistance to change within homeowners'-association-paradigm communities. No scholarly literature, qualitative or quantitative, was uncovered addressing this combination of factors. Limited scholarly literature was found addressing leadership of private communities, general manager managerial and leadership competencies, and the homeowners' association governance paradigm. In the following chapter, the research methodology utilized for this study is presented.

## CHAPTER III: METHODOLOGY

Any scientific investigation, be it in the social or natural sciences, must begin with some structure or plan. This structure defines the number and type of entities or variables to be studied and their relationship to one another. (Spector, 1981, p. 7)

This chapter presents the research methodology and processes that were utilized to conduct this study. The study's purpose statement and research questions, first introduced in Chapter I, are presented first. Following this, a comprehensive explanation of the qualitative research methodology, study population, and study sample is provided. The qualitative instrumentation is then discussed, including a detailed presentation of the study's validity, validation strategies, and reliability. This is then followed by a description of the data collection and data analysis processes utilized to conduct this research study. The chapter ends with a presentation of the study's limitations and a short chapter summary.

### **Purpose Statement**

The purpose of this qualitative case study was to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary purpose was to explore and describe generational cohorts' resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley.

## **Research Questions**

This study utilized three research questions to focus and guide associated research efforts:

1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?

## **Research Design**

This study utilized a case study research design to solicit and capture rich qualitative data. In a broad sense, qualitative research is a process by which researchers can determine the very nature or character of phenomena (Roberts, 2010). Miles, Huberman, and Saldaña (2014) stated that qualitative research can be “very vivid and illuminating” (p. 30) while Yazan (2015) described the case study as the most often utilized qualitative research methodology. Case study research has also been described as the examination of a well-defined issue over an extended period of time and a large breadth of scope while incorporating multiple and diverse data elements found within a given research setting (Creswell, 2011, 2013; McMillan & Schumacher, 2010; Patton, 2015). Finally, Patton (2015) described the case study as a “detailed and rich story about a person, organization, event, campaign, or program” (p. 259) while Stake (2006)

described it as a means to experience a case's events, activities, and processes in their actual environs and situational contexts.

A case study approach is chosen when the researcher is interested in “insight, discovery, and interpretation” (Merriam, 1988, p. 10). Case study research has also been described as a detailed, in-depth examination of a current phenomenon within a given real-world context (Yin, 2009, 2014). Hancock and Algozzine (2011) and Merriam and Tisdell (2016) stated that a case study approach allows researchers to develop a thorough understanding of complex situations and meaning for all involved. Additionally, Stake (1995) stated that a case study is a mechanism for the researcher to discover what others have yet to see, provide a reflective lens on the researcher's unique life experiences, and provide an avenue of focus to maximize one's interpretive skills.

Given the enumerated advantages and advantageous qualities of the case study methodology, a qualitative case study approach was utilized for this research study due to the unique characteristics of the research and the lack of an existing research knowledge base addressing the use of transformational leadership within gated golfing communities. More specifically, a qualitative case study approach embodies all of the key characteristics of qualitative research: design adaptability in response to study developments, discovery of contextual meaning, conduct within a natural and comfortable setting for the study participants, the discovery of contextual themes and patterns, and the inclusion of study participants' own words (Creswell, 2013; Maxwell, 2013; Patton, 2015).

## Population

A research population is defined as a grouping of individuals with similar characteristics (Creswell, 2011). Patten (2012) defined a research population as that grouping in which a researcher is interested. Rumsey (2003) described the research population as that requisite grouping of individuals to be studied to answer the given research question(s). Salkind (2011, 2014) and McMillan and Schumacher (2010) described a research population as the total number of research subjects. The research population for this study consisted of individuals serving as general managers of gated golfing communities within the state of California. Table 26 reflects a compilation of gated community housing data from the U.S. Census Bureau’s (2017) 2015 American Housing Survey, both nationally and within select California housing markets, showing the high prevalence of gated communities at both the national and state levels. Finally, McMillan and Schumacher (2010) identified a research population as the “target population” (p. 129).

Table 26

*Gated Communities—2015 American Housing Survey*

Housing market	Units by structure type						Other units
	Total units	Detached units	Attached units	2 to 19 units	20 to 49 units	≥ 50 units	
National	9,010.0	1,932.0	574.0	3,245.0	1,211.0	1,720.0	329.0
Riverside– San Bernardino	220.4	60.3	25.0	72.0	19.1	24.6	19.6
Los Angeles– Long Beach	918.2	69.9	32.0	360.0	225.4	212.3	18.9
San Francisco	256.8	23.7	8.2	102.0	45.0	76.9	0.7

*Note.* Numbers in thousands. Adapted from Table S-03 in “American Housing Survey (AHS): AHS 2015 Table Specifications,” by U.S. Census Bureau, 2017 (<https://www.census.gov/programs-surveys/ahs/data/2015/ahs-2015-public-use-file--puf-/ahs-2015-national-public-use-file--puf-.html>).

## **Target Population**

Rumsey (2003) defined the target population as “the entire group of individuals that you’re interested in studying” (p. 311) while Creswell (2011) identified a target population, or sampling frame, as a grouping of individuals or cases with common attributes and defining characteristics that are identifiable to the researcher(s). B. G. Cox (2011) identified the target population as a grouping of like subjects about which the researcher wishes to draw conclusions or inferences. The target population for this study was derived from Coachella Valley real estate professionals’ gated golfing community listings and comprised approximately 42 gated golfing communities (Bennion Deville Homes, n.d.; Mason, n.d.; D. Williams, n.d.-a). This derivation of the target population based on information from Bennion Deville Homes (n.d.), Mason (n.d.), and D. Williams (n.d.-a) was chosen for the study as these listings represented the most comprehensive, accurate, and readily available listings of gated golfing communities located in Southern California’s Coachella Valley.

## **Sample**

This study utilized nonprobability, purposeful, snowball sampling to identify gated golfing community general managers from within the defined subject population. Nonprobability sampling is used by researchers when they are unable to access a study’s total population (Fritz & Morgan, 2012). Purposive, or purposeful, sampling methods “are the most commonly used form of non-probabilistic sampling” (Guest, Bunce, & Johnson, 2006, p. 59) and have been identified as the “primary sampling strategy” in use by qualitative researchers (Creswell, 2013, p. 299). Maxwell (2013) and Patten (2012) stated that purposeful sampling affords the qualitative researcher the means to identify

and select specific individuals who can answer the study's research questions. Patton (2015) defined purposeful sampling as "strategically selecting information-rich cases to study, cases that by their nature and substance will illuminate the inquiry question being investigated" (p. 265). Snowball sampling is a form of nonprobability, purposeful sampling often utilized by qualitative researchers.

McMillan and Schumacher (2010) stated that snowball sampling is often utilized for "in-depth interview studies" (p. 327) while Patton (2015) identified snowball sampling as an "approach for locating information-rich key informants or critical cases" (p. 298). Davidson (2011) and Patten (2012) stated that snowball sampling is utilized when study participants are difficult to find or are hard to access. Snowball sampling has been identified as the most prevalent form of purposeful sampling in use today (Merriam & Tisdell, 2016). Finally, Patten (2012) identified snowball sampling as an appropriate sampling method for use by qualitative researchers.

Collins, Onwuegbuzie, and Jiao (2006) stated that sampling is a key element of the research process as it directly correlates to the quality and efficacy of the study conclusions and findings. Patton (2015) described snowball sampling as a sampling method that effectively supports the open-ended design of qualitative research. In snowball sampling, the sample is built over the course of the study by inquiring of key individuals whom they would recommend for participation in the study (Creswell, 2011). Sample participant selection commenced with the general manager of the researcher's gated golfing community and two additional general managers recommended by real estate professionals known to the researcher who resided in differing Coachella Valley gated golfing communities than that of the researcher. Upon completion of the data

collection interview with each general manager, the general manager was asked for recommendations of additional general managers who might be interested in participating in the research study. This sampling methodology was chosen as an efficacious means to overcome the closed nature of gated golfing communities by utilizing the close contacts inherent to the general manager position.

The target sample size for this study was 12 general managers of separate and distinct Coachella Valley gated golfing communities. This sample size was chosen to reduce the complexity of the data analysis and simplify the identification and outreach to the study participants, all while still affording the ability to discover generalizable themes and patterns (Collins et al., 2006; Guest et al., 2006). A sample size of one, often found associated with qualitative case study research, was not considered by the researcher due to institutional research prohibitions of the Brandman University Institutional Review Board (BUIRB).

All sample participants met the following criteria for participation in this case study:

- Case study participants were serving in an organizationally defined general manager position at the time of the study.
- Case study participants were serving as general managers of Coachella Valley gated golfing communities at the time of the study.
- Case study participants were not restricted in their ability to freely answer the qualitative interview questions.



A total of 40 Coachella Valley gated golfing community general managers were solicited for study participation. A total of 12 Coachella Valley gated golfing community general managers participated in the study.

### **Instrumentation**

The researcher utilized semistructured interviews for all data collection efforts. B. L. Leech (2002) located semistructured interviews in the middle of the interview continuum comprised of journalistic interviewing at one extreme and ethnographic interviewing at the other. In its simplest form, qualitative interviewing is nothing more than a “conversation with a purpose” with the researcher’s end objective being an understanding of the interviewee’s experiences (Alvesson & Svensson, 2011, p. 119). Seidman (2013) and Turner (2010) identified the use of interviews as a means for the researcher to understand study participants’ lived experiences, viewpoints, and derived meanings that develop from these experiences. Patton (2015) stated that an interview is “an interaction, a relationship, and an observation” (p. 427). Semistructured interviews consist of questions that are open-ended in nature and do not provide specified choices from which the interviewee must respond (McMillan & Schumacher, 2010; Rubin & Rubin, 2012). Additionally, semistructured interviews provide an effective means for the researcher to compare respondent answers while also striving to develop a full understanding of the associated experiences (Barlow, 2012).

For this study, the researcher utilized a synthesis matrix of the research developed as part of the literature review (see Appendix D) to develop a series of semistructured interview questions and an accompanying interview protocol. The interview questions were developed in a manner to identify transformational leadership traits and themes and

the varying interrelationships between transformational leadership, organizational resistance to change, homeowners' associations, and generational cohorts. Questions were developed and implemented in a manner to solicit thick, rich qualitative data. Finally, the interview questions generated for the interview protocol were tailored to specifically address the stated study research questions while simultaneously addressing the identified literature gaps in the study subject areas.

Patton (2015) stated that the interview protocol utilized by the researcher is a derivation of prior study design decisions. Additionally, Patton stated that the use of an "interview guide enhances flexibility to pursue various topics in greater or lesser detail" (p. 443) dependent on applicability and relevance to each case. For this study, the researcher utilized Patton's six interview question types for the development of the interview protocol, which consisted of both closed- and open-ended questions. These six types of questions were as follows:

- experience and behavior questions,
- opinion and values questions,
- feeling questions,
- knowledge questions,
- sensory questions, and
- background/demographic questions.

To preclude question-order effects, the researcher-developed interview questions were arranged in order utilizing B. L. Leech's (2002) question-order structure: research study purpose and focus, main/complex questions, follow-up questions, and finally, demographic questions. Additionally, probing questions were utilized where appropriate,

facilitating the researcher's ability to expand the scope and breadth of participants' responses while simultaneously increasing the quality and quantity of rich data collected (Harrell & Bradley, 2009; Patton, 2015).

### **Researcher as an Instrument of the Study**

An inherent characteristic of the qualitative research design is the researcher serving as the principal instrument for all data collection efforts (Creswell, 2014; Golafshani, 2003; Merriam & Tisdell, 2016; Patton, 2015). The researcher as an instrument of the qualitative design has been identified as a significant shortcoming and as a potential source of bias (Merriam & Tisdell, 2016; Roulston & Shelton, 2015). Patton (2015) stated that qualitative researchers must carefully reflect on, address, and report any identified sources of study bias.

For this study, the researcher conducted all of the semistructured interviews and data collection efforts. The researcher of this study lives in a gated golfing community within the Coachella Valley. Additionally, as a career naval officer, he has conducted hundreds of interviews for disciplinary matters, administrative inspections, and accident investigations.

### **Validity**

Validity determinations are key determinants of the acceptance of a research study within any given research community. Qualitative case study validity determinations are most often conducted on a highly individualized basis while the study's purpose(s) and methodology dictate the requisite validity typologies to be utilized (P. Miller, 2012). Validity represents the degree and accuracy with which an instrument measures what it was designed to measure (Carmines & Woods, 2011; Dick, 2014;

Hancock & Algozzine, 2011; Jupp, 2011; Kimberlin & Winterstein, 2008; Patten, 2012; Salkind, 2014; Spector, 1981). Maxwell (2013) stated that validity is a central and integral component of any research design. For McMillan and Schumacher (2010), validity represented the “congruence between the explanations of the phenomena and the realities of the world” (p. 330). Ward and Street (2012) stated that “validity assesses the accuracy of results” (p. 801). Finally, Roberts (2010) identified validity as the level of confidence the researcher has that the findings from his or her research are “true” (p. 151). A qualitative researcher can utilize expert validity and validation strategies for the establishment of study validity.

**Expert validation.** To establish expert validation, a researcher utilizes the determinations of experts with specific knowledge relevant to the study’s research questions and methodology (Kimberlin & Winterstein, 2008). The semistructured interview protocol for this study was reviewed by qualitative and quantitative research content experts with doctoral-level degrees. Following their review of the interview protocol, their suggestions for improvement were included in subsequent revisions of the interview protocol. The interview protocol was field tested with two past presidents of gated golfing community boards of directors with significant experience implementing and directing gated golfing community change initiatives. The field tests served as an additional feedback mechanism to increase and ensure the validity of the study.

**Validation strategies.** To ensure study validity and rigor, a researcher can implement any number of validation strategies (Morse, Barrett, Mayan, Olson, & Spiers, 2002). Merriam and Tisdell (2016) stated that validation strategies afford a qualitative researcher a means to “enhance the rigor of a qualitative study” (p. 258) while Morse et

al. (2002) stated that these strategies afford the researcher a means to know “when to continue, stop or modify the research process” (p. 17). The use of validation strategies enhances the credibility of the research (Brink, 1993; Creswell & Miller, 2000). This study incorporated the following validation strategies: thick, rich description; rich data; and member checks/respondent validation.

***Thick, rich description.*** Creswell and Miller (2000) stated that the use of highly detailed and rich descriptions of “the setting, the participants, and the themes of the qualitative study” (p. 128) result in enhanced study credibility. The thick, rich descriptions afford the reader a means to experience or immerse him- or herself into the study. The use of thick, rich data allows the reader to determine the applicability, or nonapplicability, of the study findings to other venues, settings, and contextual situations (Creswell & Miller, 2000; Merriam & Tisdell, 2016).

***Rich data.*** Maxwell (2013) stated that rich data are a result of “both long-term involvement and intensive interviews” (p. 126). These rich data are diverse and extremely detailed, allowing the researcher to determine the true nature of what is occurring within a given context (Maxwell, 2013).

***Member checks/respondent validation.*** Member checks, or respondent validation, involve the researcher “frequently confirming observations and participant meanings” via informal conversation (McMillan & Schumacher, 2010, p. 331). Creswell (2013) described member checking as a process involving the participants validating the researcher’s observations, conclusions, and data analysis findings. Maxwell (2013) stated that respondent validation is a critically important means to validate one’s research findings, conclusions, and interpreted meanings.

## **Reliability**

Researchers have identified reliability as a key component in evaluating and ensuring value and rigor within a research study (Armstrong, Gosling, Weinman, & Marteau, 1997; Brink, 1993; Mays & Pope, 1995). In broad terms, qualitative reliability concerns the consistency and repeatability of a study's findings (Dick, 2014; Gushta & Rupp, 2012; Jupp, 2011; Leung, 2015).

To ensure reliability, the researcher must demonstrate that the processes utilized for the study were “consistent, reasonably stable over time and across researchers and methods” (Miles et al., 2014, p. 312). Morse et al. (2002) stated that strict attention to reliability ensures a research study's rigor. Ward and Street (2012) stated that the overarching goal of reliability is to “minimize bias and error in the collection and analysis of data” (pp. 801-802) while Gushta and Rupp (2012) stated that reliability is an “empirical prerequisite to validity” (p. 1238). Reliability is a crucial component of a study's accuracy (Dick, 2014; Spector, 1981). Finally, Macpherson (2011) stated that a researcher can ensure study reliability by showing that his or her data analysis adhered to and is consistent with the paradigmatic epistemological research assumptions and that it addressed the given research questions. This study utilized a field test to ensure study reliability.

Creswell (2014) and Turner (2010) stated that field testing is an efficacious means of improving interview questions and design. Seidman (2013) stated that all researchers utilizing an interview protocol should conduct a pilot test to try out their interview design and processes. Similarly, Stake (1995) stated that pilot testing of interview questions should be a routine process while McMillan and Schumacher (2010) identified the pilot

test as a means to check for procedural bias, interviewer bias, and bias inherent to the individual interview questions. Finally, Maxwell (2013) identified the pilot test as a means to determine if the researcher-developed questions work as they were intended to.

Due to a limited number of individuals having similar characteristics to the sample population, a total of two individuals participated in this study's field test. Cone and Foster (2006) stated that in situations where a small number of individuals with the same characteristics as the study population are readily available, it is appropriate to utilize individuals with characteristics as close to the study population as possible. Both of the field test participants had extensive leadership experience within gated golfing communities, including leading several significant community change initiatives and serving as the president of their respective homeowners' association board of directors. The researcher provided each of these individuals with a listing of the interview questions before the scheduled interviews. The interviewees were asked for feedback upon completion of the interviews. The feedback received from the first field test interview was implemented into the interview protocol before the following interview. The field test validated that the semistructured interview questions/protocol supported answering the research questions.

### **Qualitative Data Collection**

The qualitative data collection process consisted of multiple steps, which began with the solicitation of permission for study participation by human subjects from the BUIRB and ended with 12 semistructured interviews with Coachella Valley gated golfing community general managers.

The application to the BUIRB included a study letter of invitation (Appendix E), a qualitative research consent form (Appendix F), a study participant bill of rights (Appendix G), transformational leadership and generational cohort handouts for study participants (Appendix H), the research interview protocol utilized for this study (Appendix I), and a researcher-generated research question/survey question synthesis matrix (Appendix J). The need to obtain institutional review board approval before the collection of any study data is well established in the literature (Bryant, 2004; Cone & Foster, 2006; Creswell, 2013; Yin, 2014).

Following receipt of BUIRB approval (Appendix K), the initial study participant was approached, and a mutually agreeable interview timeline was established. Additionally, due to the unique nature of the study population, the names of prospective study participants were solicited (i.e., snowball sampling) from the initial study participant at this time.

Face-to-face interview questioning, utilizing the BUIRB-approved semistructured interview protocol located in Appendix I, was conducted similarly across all of the data-gathering interview sessions. For participant convenience, all interviews were conducted at the participants' place of business within their office or conference room settings. Probing questions were utilized where appropriate to clarify participant responses. Interview lengths ranged from 1 hour 17 minutes to 40 minutes, with an average interview length of 56 minutes. Each interview session was digitally recorded via redundant recording devices. Professional transcription services were then utilized to convert the interviews from a digital audio format to a written format to facilitate data analysis via NVivo. All names and identifying information were removed from the data



to ensure participant anonymity. Upon conclusion of the study, all digital recordings were deleted to ensure participant privacy. Only sanitized data were retained by the researcher for future research efforts.

### **Data Analysis**

Upon receipt of the transcribed recordings from the transcription service, the researcher provided the transcribed recordings to the participants for their review to ensure data accuracy. Following incorporation of any participant changes, the interview transcriptions and researcher notes were uploaded into a qualitative data analysis software (QDAS) program for data coding and analysis. The use of a QDAS program is designed to “increase the effectiveness and efficiency” of the data analysis process (Bazeley & Jackson, 2013, p. 2). The researcher utilized QSR International’s NVivo for Mac (Version 11) QDAS software for the input, storage, coding, and sorting of the study’s qualitative data. The researcher utilized the coding and sorting process to identify and codify specific themes, patterns, and concepts derived from the participants’ interviews (Bazeley & Jackson, 2013; Galvin, 2015; Patton, 2015; Saldaña, 2013). The identified themes, patterns, and concepts are presented in detail in Chapter IV.

#### **NVivo**

The introduction of powerful and readily available personal computers and QDAS computer programs for qualitative data analysis has been a game-changing event for qualitative researchers. Recent research efforts have identified NVivo as an extremely agile and capable tool for assisting qualitative researchers with the analysis of large, rich, complex qualitative data sets (Bazeley, 2012; Bergin, 2011; N. L. Leech & Onwuegbuzie, 2011). Bassett (2010) identified NVivo as being particularly well suited

for case study research efforts and the production of in-depth and comprehensive case study audit trails. Miles et al. (2014) stated that researchers who choose to not utilize a QDAS program such as NVivo are at a serious disadvantage compared to researchers who choose to utilize QDAS for their qualitative data storage, retrieval, and analysis tasks. Finally, recent research by Woods, Paulus, Atkins, and Macklin (2015) stated that there is “empirical evidence that researchers are using QDAS to engage in analytical practices extending beyond the limits of manual/paper-based techniques, most notably to support coding and retrieval of data, differentiate coded data by participant characteristics, and investigate conceptual relationships” (p. 610). The following paragraph describes the use of interrater reliability and NVivo to ensure study reliability.

### **Interrater Reliability**

To increase study reliability, the interrater reliability validation strategy was utilized for all NVivo data-coding efforts. Interrater reliability was described by Roberts (2010) as “a check on the consistency” between the researcher and another rater when analyzing data involving “subjective interpretations, such as open ended questions” (p. 152). Kimberlin and Winterstein (2008) noted that interrater reliability is at its highest state when unambiguous measures are in place and the raters are well-trained and knowledgeable about applying the provided measures. Mays and Pope (1995) stated that interrater reliability is a viable method to enhance the analysis of qualitative data. Finally, interrater reliability is characterized as a means to assess the consistency of multiple raters for a given set of observations, data, or phenomena (P. Y. Chen & Krauss, 2011; Multon, 2012; Waltermaurer, 2012).

## **Limitations**

This study included several limitations. First, the small, purposeful sample was drawn from only the Coachella Valley in California, severely limiting the generalizability of the results to a larger population encompassing gated golfing communities within other regions of California, other states, and Canada. Second, the sample only included the general managers of gated golfing communities within the Coachella Valley. The inclusion of additional gated golfing community leaders (assistant general managers, chief financial officers, boards of directors) may have been advantageous to the study. Third, the study focused only on gated golfing communities, limiting the generalizability of the findings to nongated golfing communities. Fourth, the unequal participation of male and female participants may limit the generalizability of the study findings. Finally, the researcher is a member of a Coachella Valley gated golfing community which may have limited both peer and competitive gated golfing community general manager study participation.

## **Summary**

This chapter began with a review of the study's purpose statement and research questions, followed by a detailed description of the chosen case study research methodology utilized for the research study. The study's population, target population, and sample were described in detail. Instrumentation, validity, validation strategies, and reliability were then presented. These were followed by a detailed description of the data collection and data analysis processes. The chapter culminated with a description of the study's identified limitations. The following chapter presents a detailed and comprehensive review of the data collected over the course of this study.

## CHAPTER IV: RESEARCH, DATA COLLECTION, AND FINDINGS

Interviewing is rather like a marriage: everybody knows what it is, an awful lot of people do it, and yet behind each closed door there is a world of secrets. (Oakley, 1981, p. 41)

This chapter explores the responses of 12 general managers of gated golfing communities located in Southern California's Coachella Valley (Riverside County) who were interviewed via a researcher-generated, semistructured qualitative interview protocol. The interview protocol was designed to ascertain the general managers' perceptions of resistance to change and the efficacy of transformational leadership in overcoming that resistance to change within their respective communities. The following paragraphs present a succinct review of the study's purpose statement, associated research questions, the research methodology utilized, data collection procedures, the study population, and the research sample. This review is then followed by a presentation of the collected data from each interviewee by research question. Overall themes and patterns addressing the research questions are then presented. Finally, the chapter concludes with a summary presentation of the themes and patterns that emerged from the responses of all 12 study participants.

### **Purpose Statement**

The purpose of this qualitative case study was to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary purpose was to explore and describe generational cohorts'

resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley.

### **Research Questions**

This study utilized three research questions to focus and guide associated research efforts:

1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?

### **Research Methods and Data Collection Procedures**

This qualitative case study utilized a researcher-generated qualitative interview protocol consisting of semistructured interview questions to explore and describe gated golfing community general managers' perceptions of community resistance to change and the efficacy of transformational leadership in overcoming this resistance. Roberts (2010) stated that qualitative research is undertaken to ascertain the "essential character or nature of something" (p. 142) while Yazan (2015) described the case study as the most often utilized qualitative research methodology. Significant academic research is available addressing gated communities, the homeowners' association governance paradigm, organizational change, organizational resistance to change, transformational

leadership, and transformational change; there is, however, a dearth of academic research, as described in Chapter II, involving these topics simultaneously. This lack of research clearly showed a need for this study.

### **Qualitative Interviews**

Coachella Valley gated golfing community general managers were invited to participate in this research study. Following agreement to participate in, and completion of, a semistructured qualitative interview, participating general managers were queried for additional potential study participants (i.e., snowball sampling). The researcher conducted 12 semistructured interviews (Guest et al., 2006) with Coachella Valley gated golfing community general managers to develop a thorough understanding of their perspectives and perceptions of overcoming organizational resistance to change and the efficacy of transformational leadership in overcoming that same resistance.

The researcher-developed qualitative interview protocol was utilized for all data collection efforts. The interview protocol consisted of four demographic questions with four associated planned prompts (B. L. Leech, 2002); 13 primary questions specifically addressing the areas of transformational leadership, community resistance to change, homeowners' associations, and generational cohorts; 15 planned prompts supplementing the 13 primary questions; and, as required, follow-up probing questions (Turner, 2010). Each participant was asked the four demographic primary questions and associated planned prompts; the 13 primary questions and associated planned prompts; and, when appropriate, probing questions. Appendix I contains the full researcher-generated qualitative interview protocol including all four demographic questions, the 13 primary questions, and the 19 planned prompts.

Study participants were solicited via e-mail. The solicitation e-mail consisted of a brief introduction to the researcher, the research study, and the purpose of the study. The solicitation e-mail also contained a study participation letter of invitation. (A sample study participation letter of invitation, with personal identifying information removed, is contained in Appendix E.) Following receipt of an e-mail stating interest in study participation, a semistructured qualitative interview was scheduled at a time and place convenient for the general manager. All interviews were conducted onsite face-to-face at the general managers' gated golfing communities. At the time of the interviews, prior to commencement of the qualitative interview protocol, the general managers were provided with a copy of the qualitative research informed consent form (Appendix F), the Brandman University participant bill of rights (Appendix G), a copy of the researcher's National Institutes for Health (NIH) Protecting Human Research Participants web-based training course certificate of completion, a copy of the researcher-generated transformational leadership and generational cohort handouts for study participants (Appendix H), and a copy of the semistructured qualitative interview protocol questions (Appendix I). Upon completion of the informed consent form by the researcher and study participant, the semistructured qualitative interview commenced.

Dual recording devices consisting of a primary recorder and a secondary recorder were utilized to create digital audio recordings of each semistructured qualitative interview. Upon completion of each semistructured qualitative interview, the audio recording from the primary recorder was uploaded for transcription by a professional transcription service familiar with the NIH requirements for the protection of human

research participants. Upon receipt of a completed transcription, the researcher sent the transcription to the respective general manager for his or her review via e-mail.

### **Coding of Study Data**

Upon receipt of an e-mail from the general manager stating concurrence with the veracity of the transcription, each interview transcription was assigned a random identifier (e.g., General Manager 1, General Manager 2, . . . , General Manager 12) via the Research Randomizer (Urbaniak & Plous, 2013) and then uploaded into NVivo qualitative data analysis software (QDAS) for subsequent coding of themes and patterns utilizing a two-cycle data-coding approach (Mello, 2002; Saldaña, 2013). The first cycle of coding utilized a structural coding technique (MacQueen & Guest, 2008; MacQueen, McLellan-Lemal, Bartholow, & Milstein, 2008; Namey, Guest, Thairu, & Johnson, 2008; Saldaña, 2013) while the second coding cycle utilized a pattern coding technique (Miles et al., 2014; Saldaña, 2013).

To ensure interrater reliability, each transcript was coded by a secondary researcher with qualitative data experience and an earned doctoral degree. A tertiary interrater coding was completed by a fellow Brandman University doctoral candidate. The researcher's NVivo data coding was compared with the results generated by the secondary and tertiary interraters. The secondary and tertiary interraters concurred with the researcher's identified themes and patterns, indicating that interrater reliability was present (Kimberlin & Winterstein, 2008; Multon, 2012; Waltermaurer, 2012).

### **Population**

Rumsey (2003) described the research population as that requisite grouping of individuals to be studied to answer the given research question(s). Patten (2012) defined



a research population as that grouping in which a researcher is interested. Salkind (2011, 2014) and McMillan and Schumacher (2010) described a research population as the total number of research subjects. The research population for this study consisted of individuals serving as general managers of gated golfing communities within the state of California. Finally, McMillan and Schumacher (2010) identified a research population as the “target population” (p. 129).

### **Target Population**

Rumsey (2003) defined the target population as “the entire group of individuals that you’re interested in studying” (p. 311) while Creswell (2011) identified a target population, or sampling frame, as a grouping of individuals or cases with common attributes and defining characteristics that are identifiable to the researcher(s). The target population for this study consisted of Coachella Valley gated golfing community general managers.

### **Sample**

The researcher utilized nonprobability, purposeful, snowball sampling to identify Coachella Valley gated golfing community general managers for study participation. Each potential study participant was personally contacted by the researcher to solicit his or her participation in the research study. A total of 40 gated golfing community general managers were solicited for study participation by this researcher. General managers representing 12 gated golfing communities from the Coachella Valley cities of Indian Wells, Indio, La Quinta, Palm Desert, and Palm Springs participated in this study.

## **Demographic Data**

Eleven of the 12 gated golfing community general managers who participated in this study were male. Ten of the 12 gated golfing community general managers either held or were working on professional certifications/credentials. Several study participants held multiple certifications/credentials from differing awarding authorities. Certifications/credentials from the Club Managers Association of America (CMAA), the Community Associations Institute (CAI), the Community Association Managers International Certification Board (CAMICB), and the Professional Golfers' Association of America (PGA) were all represented by the gated golfing community general managers who participated in this study. When asked to describe their leadership style, none of the participating general managers described themselves as transformational leaders. Community size, location within the Coachella Valley, generational cohort compositions, architectural characteristics, and the general managers' industry experience and tenure within their communities varied among the study participants. Table 27 provides a summary description of the 12 general managers who participated in this study.

## **Presentation and Analysis of Data**

The following sections provide the NVivo QDAS data analysis results from the 12 semistructured qualitative interviews. Each section contains the data analysis findings for an individual general manager relative to the study's three research questions. The data analysis results for General Manager 1 are presented first.

Table 27

*Summary Description of Study Participants*

Participant	Community size <sup>a</sup>	Location	Tenure (years)	
			Community <sup>b</sup>	Industry <sup>c</sup>
General Manager 1	<500	Palm Desert, CA	<2	20-25
General Manager 2	500-999	La Quinta, CA	2-5	>25
General Manager 3	1,000-1,500	La Quinta, CA	2-5	20-25
General Manager 4	1,000-1,500	Palm Springs, CA	<2	>25
General Manager 5	500-999	Palm Desert, CA	2-5	>25
General Manager 6	500-999	Palm Desert, CA	<2	>25
General Manager 7	1,000-1,500	Palm Desert, CA	<2	20-25
General Manager 8	1,000-1,500	Indio, CA	>10	>25
General Manager 9	500-999	Indian Wells, CA	2-5	20-25
General Manager 10	>1,500	Palm Desert, CA	>10	>25
General Manager 11	<500	La Quinta, CA	<2	20-25
General Manager 12	<500	La Quinta, CA	5-10	<15

*Note.* Numerical ranges vice discrete values utilized to maintain the anonymity of participating general managers and their respective gated golfing communities.

<sup>a</sup>Number of homes: <500; 500-999; 1,000-1,500; >1,500. <sup>b</sup>Community tenure: <2 years; 2-5 years; 5-10 years; >10 years. <sup>c</sup>Industry tenure: <15 years; 15-20 years; 20-25 years; >25 years.

### Data Analysis by General Manager

**General Manager 1.** General Manager 1 was the general manager of a gated golfing community located in Palm Desert, California containing less than 500 homes. General Manager 1 had been the community's general manager for less than 2 years and had worked in the golf/hospitality industry between 20 and 25 years. Table 28 provides a summary of the themes and patterns that emerged from General Manager 1's responses addressing the participant's perceptions of transformational leadership's efficacy in overcoming resistance to change, the importance of working with the homeowners' association board of directors in overcoming resistance to change, and the participant's perception of generational cohorts' resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General

Manager 1’s semistructured qualitative interview, which the researcher utilized as the first step in discovering the themes and patterns within the interview data.

Table 28

*General Manager 1: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM instills a shared vision for the community</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM serves as a role model</li> <li>• The GM encourages outside-the-box thinking</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Amenities are a key area of focus for successful community change initiatives</li> <li>• Communication, communication, communication</li> <li>• Advocating transparency</li> <li>• Community involvement in the change initiative</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Baby boomers: The rebel leaders against change</li> <li>• Gen X: More accepting of change</li> <li>• Millennials: Change as a norm</li> </ul>

*Note.* GM = general manager.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

General Manager 1 stated that transformational leadership was essential to addressing and overcoming resistance to change within gated golfing communities. General Manager 1 identified a “sense of entitlement” and/or a “sense of ownership” within gated golfing communities that creates an inherent resistance to change. This sense of entitlement and/or ownership creates a requisite need to reach out and attain

community member “buyback” for any given change process. General Manager 1 identified this interaction with community members as follows:

You have to get buyback. Even if the member gives you no insight, no opinion whatsoever what to do . . . , if you reach your hand out and give them the opportunity to give you [their] insight, you will have less resistance to that change.

Through the analysis of General Manager 1’s semistructured qualitative interview data, the researcher identified several themes representing the four transformational leadership traits identified by Bass and Riggio (2006).

*Inspirational motivation.* General Manager 1 identified having a unified vision for the community as being extremely important in overcoming resistance to change. General Manager 1 stated that having a common vision for the community provides a common reference for community members on where the community is heading. Additionally, when describing the importance of a community vision, General Manager 1 stated, “You have to keep evolving and changing and saying your fitness center is good today, but what is it going to be in a couple of years?”

*Individualized consideration.* General Manager 1 described several examples of what Bass and Riggio (2006) described as individualized consideration. General Manager 1 was a self-described “coach and a mentor to my staff.” Furthermore, General Manager 1 stated,

I cannot treat everybody the same way. I know based on their personality traits and certain employees that I have to be a coach to a certain employee. I have to be a manager to a certain employee. I have to be a mentor to a certain employee.

*Idealized influence.* General Manager 1 reported leading by example. General Manager 1 also stated that he/she never followed what is characterized as the “do as I say, not as I do” style of leadership. General Manager 1 was cognizant of his/her actions and the impacts that they could have on followers, both employees and community members.

*Intellectual stimulation.* Bass and Riggio (2006) characterized intellectual stimulation as encouraging followers to think outside the box, question long-standing beliefs, and take risks. The analysis of General Manager 1’s semistructured qualitative interview responses identified examples of this transformational leadership trait. General Manager 1 stated that every interaction is “always a learning experience.” General Manager 1 also described often responding to followers’ questions by

asking them the question right back: “How would you do it?” A lot of times there are wrong answers, but without telling them they are wrong, but just giving them a little different perspective on how to go about the problem.

***Research Question 2.*** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 1 stated that working with the homeowners’ association is important as the relationship between the club and homeowners’ association is symbiotic in nature. What benefits one organization benefits the other.

General Manager 1 identified community amenities as an area where cooperation between the general manager and homeowners’ association board of directors can and

does occur. By working in conjunction with the homeowners' association board of directors, General Manager 1 stated that several community amenities had been added or updated, including an extensive golf course modernization and the addition of pickleball to the tennis facility. General Manager 1 further stated, "Private clubs nowadays have to be amenity filled and family oriented for day-to-day life."

When describing past change initiatives that had gone poorly, General Manager 1 stated that poor communication, a lack of transparency, and not including the homeowners' association board of directors and community members in the planning and implementation of the change initiative were all factors that led to the change initiatives' failure.

**Research Question 3.** The third research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?"

General Manager 1 stated that the millennial and Generation X generational cohorts are more receptive to change than the other generational cohorts. General Manager 1 stated that when community changes occur,

the younger membership are the ones who do not care; they are so into their own self, their daily lives, they are overworked. They believe that they are underpaid.

They are so worried about that, that if they were a member of a private club, they could care less if you remodel a bathroom.

Additionally, General Manager 1 stated,

The younger membership are the ones who will give you specifics on what they think that you should do, but at the end of the day, they put more faith in you, and they put more trust in you to make sure it is done correctly.

General Manager 1 identified baby boomers as the generational cohort most resistant to change. General Manager 1 characterized baby boomers' resistance to change as a product of their having "worked their whole lives to get here, and now when they finally become a part of something, they have more ownership in it. When you change the bathroom color, you are personally doing it towards them." General Manager 1 also stated as a generalization that baby boomers have a tendency to be somewhat micromanagers, resulting in more resistance to change. However, General Manager 1 further clarified that baby boomers are more accepting of community change initiatives when their opinion and feedback have been solicited concerning the change initiative.

Finally, while trying to describe community generational cohort resistance to change, General Manager 1 identified the following rationale for the differing levels of resistance to change within the various generational cohorts composing the membership of the participant's community:

The younger generations do not join private clubs for the same reason why the older generations did. . . . Women are now one of the number one reasons why families join private clubs. Not men. Women want to have friends, have fitness classes, use a pool, drop the kids off. That is what private clubs are turning into, whereas 20, 30, 40, 100 years ago it was men only just to play golf, smoke cigars, play some cards, and all this other stuff. That is not what it is anymore, so that is the reason why it is a generational challenge.



**General Manager 2.** General Manager 2 was the general manager of a gated golfing community located in La Quinta, California that comprised between 500 and 1,000 homes. General Manager 2 had been the community's general manager for a period of time between 2 and 5 years and had worked in the golf/hospitality industry for over 25 years. Table 29 provides a summary of the themes and patterns that emerged from General Manager 2's responses addressing the participant's perceptions of transformational leadership's efficacy in overcoming resistance to change, the importance of working with the homeowners' association board of directors in overcoming resistance to change, and the participant's perception of generational cohorts' resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 2's semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

**Research Question 1.** The first research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?"

General Manager 2 identified transformational leadership as being efficacious in overcoming community resistance to change. After reviewing the researcher-generated transformational leadership trait handout, in response to the question posed regarding the participant's perceptions of the efficacy of transformational leadership in overcoming community resistance to change, General Manager 2 stated, "I absolutely agree with it."

Table 29

*General Manager 2: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM instills a shared vision for the community</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM serves as a role model</li> </ul>
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Not applicable</li> </ul>
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Baby boomers: The rebel leaders against change</li> <li>• Gen X: More accepting of change</li> <li>• Millennials: Change as a norm</li> </ul>

*Note.* GM = general manager.

Additionally, General Manager 2 identified open communication and transparency as key elements contributing to the efficacy of transformational leadership in overcoming community resistance to change.

Through the analysis of General Manager 2's semistructured qualitative interview data, the researcher identified several themes representing three of the four transformational leadership traits identified by Bass and Riggio (2006).

*Inspirational motivation.* Of the four transformational leadership traits identified by Bass and Riggio (2006), General Manager 2 stated that the transformational leadership trait of inspirational motivation was the most important trait for overcoming community resistance to change. General Manager 2 stated that transparency and open communication are essential to building a common community shared vision. General Manager 2 also stated that to build a common community shared vision, the participant

“communicate[s] with key leaders before any decision is made.” Additionally, General Manager 2 reported soliciting the feedback of key leaders within the community to help mold and shape a change initiative via an iterative process. General Manager 2 identified this iterative process as “evolving the change.”

*Individualized consideration.* General Manager 2 described leadership practices aligning with Bass and Riggio’s (2006) transformational leadership trait of individualized consideration. General Manager 2 emphasized that a team concept is critical to successful change initiatives. General Manager 2 reported being “very close to the team, and not just the people who report directly to [him/her], but the other members of the team” and that he/she was “not one to make a decision solely.” When presented with the phrase, “My job is to work myself out of a job,” General Manager 2 responded, “Absolutely.”

*Idealized influence.* The analysis of General Manager 2’s semistructured qualitative interview data revealed examples of Bass and Riggio’s (2006) transformational leadership trait of idealized influence. General Manager 2 stated that he/she “lead[s] by example and lead[s] by walking around.” General Manager 2 also described trying to stay very visible for both the employees and community members.

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

Due to the organizational governance paradigm of General Manager 2’s community, the participant’s interactions with the homeowners’ association board of

directors were limited in nature. Due to this organizational structure, General Manager 2's responses to the semistructured qualitative interview protocol were not sufficient in scope and depth for research question responsive theme development.

**Research Question 3.** The third research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?"

General Manager 2 stated the belief that no one generational cohort is more receptive to change than the others. General Manager 2 further stated that the members of each generational cohort "all have their resistance for different reasons . . . at the end of the day, we all are humans. Again, in my experience, all humans are resistant to change."

General Manager 2 stated that changes to community compositional demographics as a result of changing generational cohort demographics is an area of concern for gated golfing communities. When asked if the participant believed that changing community demographics are an area of concern for private golfing communities, General Manager 2 replied, "I absolutely agree with that." General Manager 2 identified the millennial generational cohort, and Generation X to a more limited extent, as necessitating more attention and focus due to their approach to gated golfing communities and their amenity offerings. General Manager 2 stated,

Millennials, and even Generation X a little bit, are not as willing to spend a day at something. . . . They're looking for the next satisfaction. They need to roll over to the next thing a lot quicker. . . . Millennials don't seem as eager to take a whole day for their activities.

Additionally, General Manager 2 stated,

Millennials seem to be very 40 hours a week. “My free time is my free time; my work time is my work time” whereas your baby boomers and Generation X are, “I’ll work until I get the job done. I will take whatever time I have leftover for myself.”

When queried about additional amenity offerings such as Topgolf (n.d.) being a positive influence to attract younger community members, General Manager 2 stated, “Any time we can expose the millennial generation to golf and get them intrigued about it, I think we have a fighting chance to transform them into future members.”

**General Manager 3.** General Manager 3 was the general manager of a gated golfing community located in La Quinta, California that comprised 1,000 to 1,500 homes. General Manager 3 had been the community’s general manager for a period of time between 2 and 5 years and had worked in the golf/hospitality industry for a period of time between 20 and 25 years. Table 30 provides a summary of the themes and patterns that emerged from General Manager 3’s responses addressing the participant’s perceptions of transformational leadership’s efficacy in overcoming resistance to change, the importance of working with the homeowners’ association board of directors in overcoming resistance to change, and the participant’s perception of generational cohorts’ resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 3’s semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

Table 30

*General Manager 3: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• Leadership is situationally dependent</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• GM and the HOA are a team</li> <li>• HOA is a partner in community change</li> <li>• Community involvement in the change initiative</li> <li>• Communication, communication, communication</li> <li>• The yes, indifferent, and no community members</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Baby boomers: The rebel leaders against change</li> <li>• Shifting generational demographics are a cause for concern</li> <li>• Greatest generation: The antichange generation</li> <li>• Millennials: Change as a norm</li> </ul>

*Note.* GM = general manager; HOA = homeowners’ association.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

Similar to General Manager 1 and General Manager 2, General Manager 3 identified transformational leadership as being efficacious in overcoming community resistance to change initiatives. General Manager 3 stated that the four transformational leadership traits as defined by Bass and Riggio (2006) “are helpful in almost every circumstance.” General Manager 3 further stated that Bass and Riggio’s (2006) four transformational leadership traits are essential to cultivating trust between community leadership and the community members and that “the important part is trust and getting people to buy into that change, so you have to use those traits to develop that trust to get at least the door open in their mind to change.”

Through the analysis of General Manager 3's semistructured qualitative interview data, the researcher identified a singular theme representing one of the four transformational leadership traits identified by Bass and Riggio (2006). The transformational leadership trait reflected in General Manager 3's semistructured qualitative interview data was individualized consideration.

General Manager 3 self-identified as a coach and mentor. General Manager 3 stated, "I like to think I am a coach." Furthermore, General Manager 3 stated that he/she liked to "grow people in the situation" and to observe "growth in people."

**Research Question 2.** The second research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?"

General Manager 3 stated that the homeowners' association and management constitute a team. General Manager 3 described successful change efforts as "group efforts" and unsuccessful change efforts as those that were not "group efforts" and did not have community buy-in. Additionally, General Manager 3 identified the members of the homeowners' association as "good partners." General Manager 3 stated that the homeowners' association board of directors brought unique talents to the community change scenario:

The board of directors, the members on it, have come with some experiences and some knowledge, and for me, it is incredible to hear their reasoning, especially in committees.

General Manager 3 did not perceive the board of directors as any form of hindrance when undertaking community change initiatives. Finally, General Manager 3 stated that the board of directors is “very involved” in community change initiatives.

When describing past change initiatives that had gone poorly, General Manager 3 stated, “The unsuccessful is not so much a group effort. It was either my vision, my understanding of doing things as an individual and as a manager, so it didn’t have that buy-in going in.”

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

General Manager 3 identified older baby boomers as the most resistant to change. When talking about community change initiatives and generational cohorts’ resistance to change, General Manager 3 stated, “Maybe baby boomers at some point, especially older baby boomers, they were so used to working for companies for 40 or 50 years and then retiring, and there was never any change in their program.” When describing baby boomers, General Manager 3 also stated, “There are a lot of baby boomers who embrace the change for the right reasons . . . they realize success comes from change.”

Finally, General Manager 3 reported having observed the impacts of shifting generational cohort demographics regarding golf participation and subsequent impacts to the community. General Manager 3 stated that it is evident that industrywide golf participation levels of the younger generational cohorts “are shrinking.”

**General Manager 4.** General Manager 4 was the general manager of a gated golfing community located in Palm Springs, California that comprised 1,000 to 1,500



homes. General Manager 4 had been the community’s general manager for less than 2 years and had worked in the golf/hospitality industry over 25 years. Table 31 provides a summary of the themes and patterns that emerged from General Manager 4’s responses addressing the participant’s perceptions of transformational leadership’s efficacy in overcoming resistance to change, the importance of working with the homeowners’ association board of directors in overcoming resistance to change, and the participant’s perception of generational cohorts’ resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 4’s semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

Table 31

*General Manager 4: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM encourages outside-the-box thinking</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• HOA is a partner in community change</li> <li>• GM and the HOA are a team</li> <li>• The HOA board of directors are community liaisons for any given change initiative</li> <li>• Advocating transparency</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Millennials: Change as a norm</li> <li>• Shifting generational demographics are a cause for concern</li> <li>• Gen X: More accepting of change</li> <li>• Greatest generation: The antichange generation</li> </ul>

*Note.* GM = general manager; HOA = homeowners’ association.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

General Manager 4 also stated that the use of the four transformational leadership traits as described by Bass and Riggio (2006) was conducive to implementing successful community change. When asked his/her perception of the efficacy of transformational leadership in overcoming community resistance to change, General Manager 4 stated,

I mean those four criteria that you’ve established are really the basis for what every general manager should strive for. I mean it’s really the umbrella in which we need to operate. We’re touching the lives of so many different kinds of people.

When asked if one particular transformational leadership trait, as defined by Bass and Riggio (2006), was more important than the others, General Manager 4 stated,

I think they’re all equally important. . . . One may be a little bit more influential when you’re dealing with the different generations that you work with. The greatest generation versus the millennials, there is definitely a difference. But all four of those come into play.

Through the analysis of General Manager 4’s semistructured qualitative interview data, the researcher identified several supporting themes representing two of the four transformational leadership traits identified by Bass and Riggio (2006): individualized consideration and intellectual stimulation.

*Individualized consideration.* General Manager 4 identified his/her leadership style as “participatory.” Furthermore, General Manager 4 stated, “I like to participate

with my staff and with others who are decision makers, be it the board of directors or whatever.” Finally, General Manager 4 stated, “Not everybody can be approached in the same way.” Transformational leadership affords general managers different approaches for differing individuals and situations.

*Intellectual stimulation.* General Manager 4 identified the process of “sharing back and forth ideas and then coming to a common resolve of whatever the issue is” as a common methodology utilized to overcome community resistance to change. Additionally, when asked by the researcher if the participant encouraged followers to take risks, General Manager 4 replied, “Yes.” Finally, when asked by the researcher if everybody is an integral part of the machine, General Manager 4 stated, “Right.”

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 4 identified the homeowners’ association board of directors as comprising integral members of the community change process in the roles of advocacy, communications, and decision making. The homeowners’ association board of directors also serves an important communications role in the community change process. General Manager 4 described the communications role of the homeowners’ association board of directors as facilitating the flow of information. General Manager 4 stated,

The most important thing is to present facts. You’re not giving a subjective view on things like facilities. You’re showing that here’s what it’s going to cost. Here

are the benefits of that. Here are the downsides of that. Here are the ramifications that are the good and bad of it.

General Manager 4 identified the homeowners' association board of directors' decision-making role involving community change initiatives in the following manner:

Then it [the change initiative] will come to the board. The board will discuss the item. They may act on the item at that meeting. Staff is there to provide all of the information and research that they need and answer any questions or follow up for them. Then once the board has taken action, then the community would be advised on what those actions are.

***Research Question 3.*** The third research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?"

General Manager 4 identified the millennial generation as the generational cohort most receptive to change events. General Manager 4 stated that the millennial generational cohort is "used to everything changing, very dynamically, very fluidly, and very quickly." Additionally, General Manager 4 stated that members of the millennial generation have "so many other activities" with which to occupy their time.

General Manager 4 stated that the greatest generation was the generational cohort most resistant to change within the community. General Manager 4 described the greatest generation as still "loving their golf game" and partaking in the "experience" of a golf outing. However, General Manager 4 stated that the current "level of golfing excitement with the game isn't quite what it is with the greatest generation when you compare it to the millennials."

Finally, as with General Managers 1 through 3, General Manager 4 concurred with the statement that shifting generational cohort demographics are an area of concern for gated golfing communities. When queried, General Manager 4 stated, “I think it is a concern . . . as the level of golfing excitement with the game isn’t quite what it is with the greatest generation when you compare it to the millennials, for example.”

**General Manager 5.** General Manager 5 was the general manager of a gated golfing community located in Palm Desert, California that comprised 500 to 900 homes. General Manager 5 had been the community’s general manager for a period of time between 2 and 5 years and had worked in the golf/hospitality industry over 25 years. Table 32 provides a summary of the themes and patterns that emerged from General Manager 5’s responses addressing the participant’s perceptions of transformational leadership’s efficacy in overcoming resistance to change, the importance of working with the homeowners’ association board of directors in overcoming resistance to change, and the participant’s perception of generational cohorts’ resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 5’s semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

General Manager 5 stated that the use of transformational leadership traits facilitates overcoming community and organizational resistance to change.

Table 32

*General Manager 5: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM instills a shared vision for the community</li> <li>• The GM encourages outside-the-box thinking</li> <li>• The GM serves as a role model</li> </ul>
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• Community involvement in the change initiative</li> <li>• HOA is a partner in community change</li> <li>• Amenities are a key area of focus for successful change initiatives</li> <li>• GM and the HOA are a team</li> <li>• The yes, indifferent, and no community members</li> </ul>
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Greatest generation: The antichange generation</li> <li>• Gen X: More accepting of change</li> <li>• Millennials: Change as a norm</li> </ul>

*Note.* GM = general manager; HOA = homeowners' association.

When queried about the efficacy of Bass and Riggio's (2006) four transformational leadership traits in overcoming community resistance to change, General Manager 5 responded, "I think they're all part of it," referring to the community change process.

Through the analysis of General Manager 5's semistructured qualitative interview data, the researcher identified several themes representing the four transformational leadership traits identified by Bass and Riggio (2006).

*Individualized consideration.* The analysis of General Manager 5's semistructured qualitative interview data revealed descriptions of leadership practices aligning with Bass and Riggio's (2006) transformational leadership trait of individualized consideration. Like General Manager 2, General Manager 5 emphasized that a team concept is critical to successful community change initiatives. General Manager 5 stated that he/she had a "team management approach and is definitely hands on." General Manager 5 identified

several instances of activities designed to increase team spirit, including a holiday party and pickleball tournament.

*Inspirational motivation.* General Manager 5 identified communications as an essential element in developing a shared community vision. When discussing organizational processes, General Manager 5 stated, “We listen to people. I mean, we do surveys between ourselves. Not just the department heads but with their teams and making sure that everybody realizes that everybody’s a part of it.” Finally, while establishing a common community vision, General Manager 5 reported believing “in clear goals and objectives with each department head and with the board and myself, so we all are on the same page.”

*Intellectual stimulation.* Reflecting on Bass and Riggio’s (2006) transformational leadership trait of intellectual stimulation, General Manager 5 stated, “We haven’t been afraid to use new technology that we have. . . . We’ve kind of changed how we do business really and tried to use more technology to help us.” Additionally, General Manager 5 stated, “One of the things that I kind of pride myself in is to encourage our team to come up with ideas.”

*Idealized influence.* The analysis of General Manager 5’s semistructured qualitative interview data revealed examples of Bass and Riggio’s (2006) trait of idealized influence. General Manager 5 stated that the concept of idealized influence resonated with him/her. General Manager 5 identified his/her leadership style as “leading by example” and stated that being a positive role model for others was exemplified by the number of individuals who have become general managers in their own right.

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 5 stated that the homeowners’ association board of directors is an integral part of the community. The homeowners’ association board of directors serves as a communications liaison to the community members. In describing the homeowners’ association board of directors’ role in community change initiatives, General Manager 5 stated,

We’ve put together ad hoc committees of a couple of board members each and then staff members to look at stuff. So, there’s one for finance and fees, there’s one for governing documents, and then there’s one for the facilities plan, and they present to the entire board and then to the membership.

Commenting further on the importance of communications within the community, General Manager 5 stated, “I think we can reach the goals and objectives that the board’s giving me, but at the same time, we need to hear from the people [community members].”

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

General Manager 5 identified older baby boomers and the greatest generation as the generational cohorts most resistant to change. When queried as to the generational cohort most resistant to community change, General Manager 5 stated, “Resistance to



change I think for me is a normal human characteristic. . . . I would say members over 70 plus, I think that their resistance to change is higher.” General Manager 5 also identified the greatest generation as the most difficult generational cohort for addressing facility improvements or additions, stating, “We’re looking at really updating our facilities, and that’s the toughest sell to that generation.” General Manager 5 attributed this reluctance on the part of the greatest generation to the following attitude:

I don’t want to be disturbed. I may only have a couple of good years left, and I don’t want to be bothered by this, and real honestly, I’m not worried about the next people coming in. So, I think there’s a lot of resistance there.

General Manager 5 identified the Generation X and millennial generational cohorts as more receptive to community change initiatives. General Manager 5 attributed this acceptance of change to the technology that Generation X and the millennial generational cohorts utilize on a daily basis. This technology is changing/morphing at an accelerating pace. This acceptance of a constantly changing/morphing technological environment is being carried over into other aspects of Generation X and the millennial generational cohorts’ daily lives. General Manager 5 characterized this technological impact on the Generation X and millennial generational cohorts with the following statement: “The technology that they use and how they look at things. It’s kind of like almost a Yelp generation in what they’re looking for.” Finally, General Manager 5 identified several trends in the Coachella Valley being driven by the desires of the Generation X and millennial generational cohorts: casual outdoor dining, smaller plates, and modern fitness centers.

**General Manager 6.** General Manager 6 was the general manager of a gated golfing community located in Palm Desert, California that comprised 500 to 999 homes. General Manager 6 had been the community’s general manager for less than 2 years and had worked in the golf/hospitality industry over 25 years. Table 33 provides a summary of the themes and patterns that emerged from General Manager 6’s responses addressing the participant’s perceptions of transformational leadership’s efficacy in overcoming resistance to change, the importance of working with the homeowners’ association board of directors in overcoming resistance to change, and the participant’s perception of generational cohorts’ resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 6’s semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

Table 33

*General Manager 6: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM instills a shared vision for the community</li> <li>• The GM serves as a role model</li> <li>• The GM encourages outside-the-box thinking</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• Transparency is paramount to successful community change</li> <li>• GM and HOA are a team</li> <li>• HOA is a partner in community change</li> <li>• Community involvement in the change initiative</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Greatest generation: The antichange generation</li> <li>• Millennials: Change as a norm</li> </ul>

*Note.* GM = general manager; HOA = homeowners’ association.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

General Manager 6 stated that the use of transformational leadership traits facilitates overcoming community and organizational resistance to change. General Manager 6 made several comments describing his/her role as the general manager within a transformational leadership paradigm, including, “My job is to make your life better,” and “we’re in the relationship business.”

Through the analysis of General Manager 6’s semistructured qualitative interview data, the researcher identified several themes representing the four transformational leadership traits identified by Bass and Riggio (2006).

*Individualized consideration.* General Manager 6’s semistructured qualitative interview data contained several examples of Bass and Riggio’s (2006) individualized consideration transformational leadership trait. General Manager 6 stated that he/she has “always liked partnering with people” and noted, “I can’t pay you a million dollars, that would go to the quick end result; so, what I can do on our journey together is to make you have a better quality of life.” Finally, General Manager 6 stated, “The fun part is to get them [community members/staff] to work together.”

*Inspirational motivation.* General Manager 6 self-identified as being “extremely motivational.” General Manager 6 stated that it was important to have a shared vision within the community. To accomplish this shared vision, General Manager 6 identified transparency and personal credibility as key success factors. When addressing the concept of a shared community vision, General Manager 6 stated,

At the end of the day, I will have no success on my own. It has to be what the members want. Because what I see and what they see are different. They're different things. They're seen differently, so I have to understand what their vision is and adapt my vision, their vision, and blend it, and make it the same vision.

Finally, General Manager 6 stated,

We build [a] shared vision over time. That allows us to collectively do it and at least they feel it's being done together. . . . I'm pointing them in the right direction, but it needs to feel emotionally like it is something more shared.

*Idealized influence.* Bass and Riggio's (2006) transformational leadership trait of idealized influence describes the transformational leader as a role model within the organization. General Manager 6 stated, "My leadership style is to roll up my sleeves and jump into the trench," and "you never get so busy making a living you forget to make a life." Finally, when referring to interactions with community employees, General Manager 6 stated, "My job is to make your life better."

*Intellectual stimulation.* Bass and Riggio's (2006) transformational leadership trait of intellectual stimulation characterizes the transformational leader as an individual who encourages outside-the-box thinking and risk taking. The rote answer of "that's how we've always done it" is not in the transformational leader's lexicon. General Manager 6 described intellectual stimulation as "the fun of it is to find that thing out of the box." General Manager 6 also identified the importance of looking for ideas to improve the community by looking outside the walls of the community. General Manager 6 was an avid reader of the industry trade literature to look for solutions and ideas applicable to the

participant's community. When referring to the industry trade literature, General Manager 6 stated, "Any literature, love to read it, love to use it, love to interact with it."

**Research Question 2.** The second research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?"

General Manager 6 identified that working with/through the homeowners' association board of directors was central to the success of community change initiatives. General Manager 6 stated that the community leadership resides within the homeowners' association board of directors. To achieve community change, General Manager 6 stated, "The culture here is with the leadership at the board level, and this is the only one you've got to convince, those nine guys on the board [of directors]. They've been elected to represent everyone else." Additionally, when describing the relationship between the general manager and the board of directors, General Manager 6 stated, "I really preach that it's the same pair of pants. It's a left pocket and a right pocket."

**Research Question 3.** The third research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?"

General Manager 6 identified the greatest generation generational cohort as the most resistant to change. General Manager 6 stated, "Changing that group, getting flexibility out of that group isn't going to happen."

The millennial generational cohort was identified as the most receptive to change by General Manager 6. General Manager 6 stated that the millennial generation is "such

a different dynamic” compared to the other generational cohorts. Additionally, General Manager 6 stated that the millennial generation has a much higher “need factor” for personalized attention and recognition than the other generational cohorts.

General Manager 6 concurred with the statement that changing generational demographics are an area of concern for gated golfing communities. General Manager 6 responded to this query with, “Absolutely. I mean we’re going to be just like the dinosaurs, extinct and dead if we don’t make change happen.” Additionally, General Manager 6 stated, “You have to become more family-friendly driven . . . even if it’s an older group of family friendliness. Safe family-friendly environments [are] the number one reason people join clubs now; it’s not golf.”

**General Manager 7.** General Manager 7 was the general manager of a gated golfing community located in Palm Desert, California that comprised 1,000 to 1,500 homes. General Manager 7 had been the community’s general manager for less than 2 years and had worked in the golf/hospitality industry for a period of time between 20 and 25 years. Table 34 provides a summary of the themes and patterns that emerged from General Manager 7’s responses addressing the participant’s perceptions of transformational leadership’s efficacy in overcoming resistance to change, the importance of working with the homeowners’ association board of directors in overcoming resistance to change, and the participant’s perception of generational cohorts’ resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 7’s semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

Table 34

*General Manager 7: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM instills a shared vision for the community</li> <li>• The GM encourages outside-the-box thinking</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• No is a default answer</li> <li>• GM and the HOA are a team</li> <li>• HOA is a partner in community change</li> <li>• Transparency is paramount to successful community change</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Greatest generation: The antichange generation</li> <li>• Gen X: More accepting of change</li> </ul>

*Note.* GM = general manager; HOA = homeowners’ association.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

When queried about the efficacy of transformational leadership in overcoming community resistance to change, General Manager 7 stated, “I certainly think it would.” In particular, General Manager 7 stated that the use of transformational leadership would be beneficial in overcoming the “this is what we’ve always done” mindset present in the community.

Three of the four transformational leadership traits defined by Bass and Riggio (2006) were identified by the researcher during the analysis of General Manager 7’s semistructured qualitative interview data. The identified transformational leadership

traits were individualized consideration, inspirational motivation, and intellectual stimulation.

*Individualized consideration.* General Manager 7 stressed the importance of a team concept within the community. General Manager 7 stated, “I’m just basically the director of getting everybody working together on the same page.” Finally, further addressing the team concept, General Manager 7 stated, “Basically we’re all part of this wheel. Each spoke is a different department, whether it’s food and beverage or golf . . . the synergy of the team is the key to everything.”

*Inspirational motivation.* General Manager 7 stressed the importance of a shared vision within the community. This importance was characterized by the following statement by General Manager 7: “Be honest. Be clear and say this is exactly where we want to go.” General Manager 7 referred to his/her role in the change process as follows: “I’m just basically the director of getting everybody working together on the same page.” General Manager 7 also stated,

I want to be the central message that’s going out. I want my voice to be heard clear to where if there’s going to be change, they know it’s coming from me. And that it’s honest and that we’re all focused on the same thing.

*Intellectual stimulation.* General Manager 7 believed thinking outside the box was an essential element to overcoming community resistance to change. General Manager 7 stated, “No idea is outside of the box.” General Manager 7 stressed the vital role of communications in sharing ideas among the change initiative participants. General Manager 7 stated,



But everybody along the lines can help out. If there's something that is going on in food and beverage, the golf shop should know about what's going on there.

Same way if we're doing something on the golf course: Food and beverage and the golf shop should know exactly what's happening out there.

Finally, General Manager 7 stated,

Everybody can think, "You know what? I see this is the way you've been doing it, but there's a better way to be doing it. Why don't we try it this way?" We may completely fall on our face, and we may blow this thing up. But we could always change. This stuff isn't written in stone.

**Research Question 2.** The second research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?"

General Manager 7 stated that the homeowners' association board of directors is an asset and a "benefit" in the community change arena. For General Manager 7, the homeowners' association board of directors served as a communications conduit and as community liaisons. General Manager 7 stated that the board is a "group of members that are kind of the voice of the members." According to General Manager 7, the board affords a mechanism through which they can operate to distribute information to all the homes within the community without the general manager having to contact each homeowner individually. Finally, General Manager 7 reported working through/with the board prior to any change initiative going out to the membership. The board helps to "bridge the gap" between management and the homeowners.

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

General Manager 7 identified Generation X as the generational cohort more accepting of community change initiatives. General Manager 7 stated that Generation Xers “are willing to see things from a different perspective” and are much more “willing to adapt.” According to General Manager 7, the Generation X generational cohort is more accepting of changes to the country club paradigm, such as relaxed dress codes and more family-centric amenity offerings.

General Manager 7 identified the greatest generation and older baby boomers as the generational cohorts most resistant to community change initiatives. General Manager 7 stated, “The greatest generation and some high-end baby boomers are still a little bit resistant.” Additionally, General Manager 7 identified the greatest generation as the generational cohort withdrawing from the golfing aspect of the community and focusing more so on the social aspects/offerings of the community.

When queried as to whether the participant concurred with the observation that changing generational cohort demographics are an area of concern for gated golfing communities, General Manager 7 responded, “Absolutely.” Furthermore, General Manager 7 stated that the clubs currently succeeding in this shifting demographic landscape are the ones that have specifically addressed the need for community change in response to the shifting demographic landscape. General Manager 7 identified the wife’s role in the decision-making process as a significant change occurring within the generational cohorts. General Manager 7 stated,

When I'm sitting down with someone, it's not about just what the gentleman wants to do; the wife is in there, and the kids are in there. . . . "What's going to be in it for me as a wife? Do I get to play? Do I play tennis? Are there social aspects to/for me?"

**General Manager 8.** General Manager 8 was the general manager of a gated golfing community located in Indio, California that comprised 1,000 to 1,500 homes. General Manager 8 had been the community's general manager for over 10 years and had worked in the golf/hospitality industry over 25 years. Table 35 provides a summary of the themes and patterns that emerged from General Manager 8's responses addressing the participant's perceptions of transformational leadership's efficacy in overcoming resistance to change, the importance of working with the homeowners' association board of directors in overcoming resistance to change, and the participant's perception of generational cohorts' resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 8's semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

**Research Question 1.** The first research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?"

In response to being asked his/her perception as to the efficacy of transformational leadership traits in overcoming resistance to change, General Manager 8 stated,

Table 35

*General Manager 8: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The GM instills a shared vision for the community</li> <li>• The GM serves as a coach, mentor, advisor, advocate</li> </ul>
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• No is a default answer</li> <li>• Communication, communication, communication</li> <li>• Community involvement in the change initiative</li> <li>• Transparency is paramount to successful community change</li> </ul>
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Baby boomers: The rebel leaders against change</li> <li>• Greatest generation: The antichange generation</li> </ul>

*Note.* GM = general manager.

I think effecting change in a community is an educational challenge. What you have to do is convince the homeowners or members of the need for the change and that it's going to be good for them in the long run.

This position is contrary to the perceptions of General Managers 1 through 7 as to the efficacy of transformational leadership in overcoming community resistance to change.

Two of the four transformational leadership traits defined by Bass and Riggio (2006) were identified by the researcher during the analysis of General Manager 8's semistructured qualitative interview data. The identified transformational leadership traits for General Manager 8 were inspirational motivation and individualized consideration.

*Inspirational motivation.* When queried as to whether the participant tried to instill a shared vision toward community change initiatives, General Manager 8 stated,

“Absolutely.” General Manager 8 also responded “absolutely” when queried as to whether building a shared vision for the community was the most important transformational leadership trait defined by Bass and Riggio (2006). In an effort to instill a communitywide shared vision regarding community facilities and infrastructure, General Manager 8 was producing a facilities master plan. General Manager 8 described the facilities master plan as “a visionary document that says in the next X number of years, it’s likely that some projects will be needed, and these are the projects.” When describing an unsuccessful change initiative, General Manager 8 stated, “I think it was not so much the project but just not having enough vision.”

*Individualized consideration.* General Manager 8 described his/her management style as being “a consensus seeker.” General Manager 8 also stated, “I like to make sure that my staff has the tools that they need to get their job done. I like to monitor them from a slight distance.”

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 8 viewed the homeowners’ association board of directors as an asset when addressing community resistance to change. When asked whether the homeowners’ association board of directors was perceived as a benefit or hindrance, General Manager 8 responded, “They’re an absolute benefit.” General Manager 8 also characterized the homeowners’ association board of directors’ participation in community change initiatives as decision making in nature. Finally, General Manager 8

stated the belief “that boards just have to decide that it’s [the change is] best for the community and make the decision regardless of the naysayers.”

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

Due to the unique characteristics of the community, General Manager 8 reported not perceiving any difference in the acceptance of change for the generational cohorts the community comprised. This perception by General Manager 8 was similar to that of General Manager 3. General Manager 8’s community was undergoing the transition from the greatest generation as the dominant generational cohort to the emergence of the baby boomer generation as the dominant generational cohort. General Manager 8 explained his/her inability to definitely respond “because we’re just starting with the baby boomers becoming a voice in the community.” General Manager 8 reported anticipating that as the baby boomers begin to dominate activities within the community, they will be more receptive to change than the greatest generation generational cohort.

When asked if he/she agreed with the observation that changing generational cohort demographics are an area of concern for gated golfing communities, General Manager 8 responded, “I do.” General Manager 8 described the observation that the “baby boomer generation doesn’t seem to participate as much in the old-school country club activities that the greatest generation did and still does.” General Manager 8 noted one of the areas with decreased participation rates was specifically golf.

**General Manager 9.** General Manager 9 was the general manager of a gated golfing community located in Indian Wells, California that comprised 500 to 999 homes.

General Manager 9 had been the community’s general manager for a period of time between 2 and 5 years and had worked in the golf/hospitality industry for a period of time between 20 and 25 years. Table 36 provides a summary of the themes and patterns that emerged from General Manager 9’s responses addressing the participant’s perceptions of transformational leadership’s efficacy in overcoming resistance to change, the importance of working with the homeowners’ association board of directors in overcoming resistance to change, and the participant’s perception of generational cohorts’ resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 9’s semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

Table 36

*General Manager 9: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The GM instills a shared vision for the community</li> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM serves as a role model</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• Amenities are a key area of focus for successful change initiatives</li> <li>• The HOA board of directors are community liaisons for any given change initiative</li> <li>• The yes, indifferent, and no community members</li> <li>• Community involvement in the change initiative</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Gen X: More accepting of change</li> <li>• Greatest generation: The antichange generation</li> </ul>

*Note.* GM = general manager; HOA = homeowners’ association.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

When queried about the efficacy of transformational leadership in overcoming community resistance to change, General Manager 9 stated, “Yes, absolutely.” The researcher identified one of the four transformational leadership traits defined by Bass and Riggio (2006) during the analysis of General Manager 9’s semistructured qualitative interview data. The identified transformational leadership trait for General Manager 9 was inspirational motivation.

General Manager 9 stated, “Inspirational motivation is something that I really kind of try, practice, and do.” When presented with a probing question to ascertain if the participant tried to build a shared vision within the community for proposed community change initiatives, General Manager 9 stated, “Right.” When describing the establishment of a shared community vision, General Manager 9 stated,

The best thing that I feel you can do is be transparent and get what’s really true out there rather than letting people kind of make up their own mind and making up their own decisions as to what’s going to happen or why it’s going to happen. Continuing, General Manager 9 stated, “I also kind of try and just bring a sense of hope and purpose and where we’re trying to get to as a team.”

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”



In a similar vein to that of General Manager 8, General Manager 9 also reported viewing the homeowners' association board of directors as an asset when addressing community resistance to change. General Manager 9 stated that the homeowners' association board of directors served as a receptive audience for new ideas and as a liaison between the general manager and the members of the community. When describing the liaison role of the homeowners' association board of directors, General Manager 9 stated, "They're liaisons . . . they're all very smart, successful people. They are, so why would I not lean on their knowledge?" While referring to the homeowners' association board of directors as a sounding board for new ideas, General Manager 9 stated, "I just try and lean on them . . . 'What do you think of this? Give me some feedback before I take it out to the general membership.'"

***Research Question 3.*** The third research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?"

General Manager 9 identified Generation X as the generational cohort most receptive to change. When queried as to why he/she believed that Generation X was most receptive to change, General Manager 9 stated, "I still think that they're young enough that they are in touch with kind of what's going on social media-wise, news-wise, that they're still able to kind of change and accept it."

General Manager 9 identified the greatest generation as the generational cohort most resistant to change. General Manager 9 attributed this resistance from the greatest generation generational cohort to their being accustomed to environments that did not change over extended periods of time. The greatest generation was accustomed to

working for the same company for 20, 30, or 40 years. Their country clubs were places to escape to on the weekends. General Manager 9 described, “Saturday and Sunday they’d spend at the club, without their wife, playing golf, drinking, playing cards. It’s just a different lifestyle nowadays than what it was back then.”

When presented with the observation that changing generational cohort demographics are an area of concern for gated golfing communities, General Manager 9 responded, “Absolutely.” General Manager 9 stated that the community was now “doing events that are really geared towards family.” General Manager 9 continued this line of reasoning by stating,

As a leader in my home of the older generation, I would tell my wife what I’m going to do and how I’m going to do it. I feel like now, even our younger members, which would be some of the Generation X, it’s a mutual decision. It’s not me telling my wife so much anymore. The wife plays a bigger role in what’s being done within our family. That’s really why it’s changed.

Finally, General Manager 9 identified a change in mindset between the older generational cohorts and the younger generational cohorts as a reason for the changing demand for and within gated golfing communities. General Manager 9 observed,

I feel like the member today really measures in their mind, “What’s the value of being a member, what’s the value of it?” I think in the past that wasn’t necessarily the case. You had the money. You paid it.

**General Manager 10.** General Manager 10 was the general manager of a gated golfing community located in Palm Desert, California that comprised over 1,500 homes. General Manager 10 had been the community’s general manager for over 10 years and

had worked in the golf/hospitality industry for over 25 years. Table 37 provides a summary of the themes and patterns that emerged from General Manager 10's responses addressing the participant's perceptions of transformational leadership's efficacy in overcoming resistance to change, the importance of working with the homeowners' association board of directors in overcoming resistance to change, and the participant's perception of generational cohorts' resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 10's semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

Table 37

*General Manager 10: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The efficacy of transformational leadership is clear</li> <li>• The GM instills a shared vision for the community</li> </ul>
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• GM and the HOA are a team</li> <li>• HOA is a partner in community change</li> <li>• The HOA board of directors are community liaisons for any given change initiative</li> <li>• The yes, indifferent, and no community members</li> <li>• Community involvement in the change initiative</li> </ul>
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting demographics are a cause for concern</li> <li>• Baby boomers: The rebel leaders against change</li> <li>• Greatest generation: The antichange generation</li> </ul>

*Note.* GM = general manager; HOA = homeowners' association.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

General Manager 10 stated that the use transformational leadership traits facilitates overcoming community and organizational resistance to change. When queried about the efficacy of Bass and Riggio’s (2006) four transformational leadership traits in overcoming community resistance to change, General Manager 10 responded, “Oh absolutely.”

The researcher identified one of the four transformational leadership traits defined by Bass and Riggio (2006) during the analysis of General Manager 10’s semistructured qualitative interview data. The identified transformational leadership trait for General Manager 10 was inspirational motivation.

General Manager 10 identified inspirational motivation as the most important transformational leadership trait as defined by Bass and Riggio (2006). When asked to identify the most important transformational leadership trait, General Manager 10 stated, “I would say the inspirational motivation is probably the strongest in my head.” General Manager 10 stated that a common, or shared, vision is an inherent element of his/her leadership portfolio. General Manager 10 utilized the word *vision* to describe a current change initiative within the community centered on the development/introduction of a new fitness paradigm to the community. Additionally, General Manager 10 described a “good run of board vision” being communicated to the membership, resulting in the betterment of the community. Finally, when discussing community change initiatives,

General Manager 10 stated, “I have a vision of what we should do, could do for the future” of the community.

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 10 identified the homeowners’ association board of directors as a benefit when addressing community change initiatives. General Manager 10 stated that the homeowners’ association board of directors aids with transparency, communications, and community liaison. When discussing transparency and the homeowners’ association board of directors, General Manager 10 stated, “You keep giving them information.” When discussing working with the homeowners’ association board of directors, General Manager 10 stated, “I think we’ve had a good run of board cooperation and board vision, and that has been communicated [to the community].” Finally, in describing the homeowners’ association board of directors’ liaison role, General Manager 10 stated,

We have liaisons that go to each of the committees . . . and they are active in the communication to and from those committees to the board, as well as communicating back, encouraging people to talk to the community about the things that are happening.

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

General Manager 10 identified the baby boomer generational cohort as the most receptive to change. When asked why the participant felt the baby boomers were more receptive to change than the other generational cohorts, General Manager 10 stated, “They’ve been exposed to a little bit more computer knowledge, I think, and they have adapted probably a little bit better.”

General Manager 10 identified the greatest generation as the generational cohort most resistant to change. General Manager 10 characterized this resistance as follows: “I think in their world, everything is happening so quickly, they sometimes feel like things get bumpy.” Similar to General Manager 9, General Manager 10 felt that the greatest generation generational cohort’s resistance to change was a product of the environment in which they spent their adult lives. When presented with the analogy that the greatest generation generational cohort went to college, went to work for one company, spent their entire careers at one company, and were introduced to limited change, General Manager 10 stated, “I think that’s very fair.”

General Manager 10 concurred with the assessment that changing demographics within the generational cohorts are an area of concern for gated golfing communities. When presented with the above statement, General Manager 10 stated, “I agree with that.” General Manager 10 added,

We know that the community is changing . . . we’re noticing the younger people moving in, and they’re active. There are hiking clubs. There are biking clubs, and all these things are happening now because of change in the generation that’s here.

Continuing in the same vein, General Manager 10 stated further,

There are a lot of people that still want to be active. They don't want to give up, and so that's where I think the spring up of all these other little clubs is showing that they want more—line dancing, drama.

**General Manager 11.** General Manager 11 was the general manager of a gated golfing community located in La Quinta, California that comprised less than 500 homes. General Manager 11 had been the community's general manager for less than 2 years and had worked in the golf/hospitality industry for a period of time between 20 and 25 years. Table 38 provides a summary of the themes and patterns that emerged from General Manager 11's responses addressing the participant's perceptions of transformational leadership's efficacy in overcoming resistance to change, the importance of working with the homeowners' association board of directors in overcoming resistance to change, and the participant's perception of generational cohorts' resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 11's semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

**Research Question 1.** The first research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?"

General Manager 11 stated that transformational leadership, as characterized by Bass and Riggio's (2006) four transformational leadership traits, is efficacious in overcoming community resistance to change. When queried as to whether the four

Table 38

*General Manager 11: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The GM serves as a coach, mentor, advisor, advocate</li> <li>• The GM serves as a role model</li> <li>• The GM instills a shared vision for the community</li> <li>• The GM encourages outside-the-box thinking</li> </ul>
2. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Communication, communication, communication</li> <li>• GM and the HOA are a team</li> <li>• HOA is a partner in community change</li> <li>• Community involvement in the change imitative</li> <li>• The transparency is paramount to successful community change</li> </ul>
3. How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Baby boomers: The rebel leaders against change</li> <li>• Gen X: More accepting of change</li> </ul>

*Note.* GM = general manager; HOA = homeowners’ association.

transformational leadership traits were effective in overcoming community resistance to change, General Manager 11 stated, “Yes, there is no question about it.”

The researcher identified three of the four transformational leadership traits defined by Bass and Riggio (2006) during the analysis of General Manager 11’s semistructured qualitative interview data. The identified transformational leadership traits were individualized consideration, idealized influence, and inspirational motivation.

*Individualized consideration.* The concepts of team, mentoring, and coaching were evident in General Manager 11’s semistructured qualitative interview data. When discussing the concept of teamwork and being a team, General Manager 11 stated,

I try to create a very teamwork [oriented] environment, and those little changes, I think, to me . . . are inspirational to the team, because they realize that I care for their well-being too.



Concerning mentoring, General Manager 11 stated, “I want my people to get mentored so they can make their own decisions.” General Manager 11 addressed the role of coaching by stating, “So, if I wanted to get them all the way around to third base, sometimes I have to tell them whether they go home or not.”

*Idealized influence.* Bass and Riggio’s (2006) transformational leadership trait of idealized influence was characterized as the transformational leader being a role model for his or her followers. General Manager 11 touched on the concept of idealized influence when stating, “If there’s one thing I’m proud of, if anything that I’ve been given credit around here is, I keep hearing from a feedback perspective that I’ve brought energy to the place.” Additionally, General Manager 11 stated, “I think it’s the most important part of the job as the general manager other than protecting the assets of the club . . . is to be seen out in front,” and “I think it’s . . . I’m one of them [the staff/community members].”

*Inspirational motivation.* General Manager 11 identified Bass and Riggio’s (2006) transformational leadership trait of inspirational motivation as the most important transformational leadership trait. When queried to state the most important transformational leadership trait, General Manager 11 stated, “There’s no question to me, it’s the inspirational motivation; I think it’s so key.” When describing the importance of a singular vision for the club and community, General Manager 11 stated,

I think when you instill into the people that the motivation of what we’re all after here, and they see the growth, and they see us moving, they see us selling memberships, and they see members served come back, that is motivation to them as well.

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 11 stated that the homeowners’ association board of directors was an asset in overcoming community resistance to change. General Manager 11 identified the homeowners’ association board of directors as a supporting structure for the general manager during change initiatives. When queried if the participant viewed the homeowners’ association board of directors as a benefit in overcoming community resistance to change, General Manager 11 stated, “Sure. Yes.” Furthermore, General Manager 11 stated, “You just hit on something that’s so important: It’s getting people, whether it would be in some sort of leadership positions, that support the general manager in areas of change.” Additionally, General Manager 11 identified the members of the homeowners’ association board of directors as facilitators of transparency and communications between the general manager, members, and the community as a whole.

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

General Manager 11 identified Generation X as the generational cohort most receptive to community change initiatives. General Manager 11 stated, “Gen X is way more receptive than the baby boomer generation; there’s no question about it.” Additionally, when referring to Generation X’s adaptability to change, General Manager 11 stated, “I think they’re used to it a little bit more . . . it’s more mainstream for them to

be involved with change.” General Manager 11 also stated that Generation X is more apt to socialize with a larger group of people at the club than the older generational cohorts. General Manager 11 stated, “The younger people would be more apt to spread themselves a little bit,” and “it’s a free-for-all” when determining dining companions, seating, and so forth.

General Manager 11 identified the baby boomer generation as the generational cohort most resistant to change initiatives. When referring to the baby boomer generational cohort as more resistant to change than the others, General Manager 11 stated that it was “without question” that the baby boomer generation was the generational cohort most resistant to change.

Similar to General Managers 9 and 10, General Manager 11 felt that the greatest generation generational cohort’s resistance to change was a product of the environment in which they spent their adult lives. When asked if the participant concurred with the statement that the greatest generation generational cohort went to college, went to work for one company, spent their entire careers at one company, and were introduced to limited change, General Manager 11 stated, “You absolutely nailed it; that [is] exactly what it is.”

General Manager 11 concurred “without question” with the assessment that changing demographics within the generational cohorts are an area of concern for gated golfing communities. General Manager 11 identified the larger number of competing activities as a leading cause of decreased participation in gated golfing communities. General Manager 11 characterized this changing situation as follows: “They [members] don’t go out to the club on Thursday afternoon for the martini lunch and play golf, and

this and that. . . . They've got to get to soccer practice, this, this, this, and that.”

Additionally, General Manager 11 stated, “And one thing that I see in my club, there's no question that the women make a huge part of the decisions for the men, for the family,” subsequently impacting participation rates.

**General Manager 12.** General Manager 12 was the general manager of a gated golfing community located in La Quinta, California that comprised less than 500 homes. General Manager 12 had been the community's general manager for a period of time between 2 and 5 years and had worked in the golf/hospitality industry for less than 15 years. Table 39 provides a summary of the themes and patterns that emerged from General Manager 12's responses addressing the participant's perceptions of transformational leadership's efficacy in overcoming resistance to change, the importance of working with the homeowners' association board of directors in overcoming resistance to change, and the participant's perception of generational cohorts' resistance to change. Appendix L contains a graphical word cloud representation of the top 100 words by frequency from General Manager 12's semistructured qualitative interview, which the researcher utilized as the first step in discovering themes and patterns within the interview data.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?”

General Manager 12 stated that transformational leadership is an essential element for addressing and overcoming resistance to change within gated golfing communities.

Table 39

*General Manager 12: Themes and Patterns Relative to Research Questions*

Research question	Themes in responses
1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?	<ul style="list-style-type: none"> <li>• The GM instills a shared vision for the community</li> <li>• Leadership is situationally dependent</li> <li>• The GM serves as a role model</li> <li>• The efficacy of transformational leadership is clear</li> </ul>
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?	<ul style="list-style-type: none"> <li>• Transparency is paramount to successful community change</li> <li>• Communication, communication, communication</li> <li>• No is a default answer</li> <li>• HOA is a partner in community change</li> <li>• Community involvement in the change initiative</li> </ul>
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?	<ul style="list-style-type: none"> <li>• Shifting generational demographics are a cause for concern</li> <li>• Greatest generation: The antichange generation</li> <li>• Baby boomers: The rebel leaders against change</li> </ul>

*Note.* GM = general manager; HOA = homeowners' association.

General Manager 12 stated, "You either have it [transformational leadership], or you do not. If you do not, you are not successful."

Through the analysis of General Manager 12's semistructured qualitative interview data, the researcher identified several themes representing two of the four transformational leadership traits identified by Bass and Riggio (2006). The two transformational leadership traits represented in General Manager 12's interview data were inspirational motivation and idealized influence.

*Inspirational motivation.* General Manager 12 identified Bass and Riggio's (2006) transformational leadership trait of inspirational motivation as the most important transformational leadership trait. When describing the importance of a shared vision, General Manager 12 stressed the importance of communication and transparency feeding into and creating a shared vision for the community. To nurture a community shared

vision, General Manager 12 stated, “The day does not go by that I do not go by and see one of them [board members] and kind of brief them on what is going on.” General Manager 12 referred to this constant communication paradigm as his/her “Walmart” or management-by-walking-around style of leadership. A final example of building a shared community vision was captured by the following statement from General Manager 12:

I probably twice a week send out little updates, and I am getting little nibbles of information back . . . “We do not want to do that” and so forth. And those things help me to fine tune what I am eventually going to get. I do not know who is going to win the bid, but when it does, they are going to be within a scope that the board has already told me that they want to be in.

*Idealized influence.* General Manager 12 reported leading “by wandering around.” For General Manager 12, idealized influence was a manifestation of “all those people [the participant] had worked for that had traits that [the participant] could use.” Continuing this thought, General Manager 12 identified a potentially inherent conflict in Bass and Riggio’s (2006) characterization of idealized influence in that if a leader is the product of those he or she has worked for in the past, then “if your background history was with poor leadership, you do not have that background to go to” when faced with new or continuing leadership challenges.

**Research Question 2.** The second research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?”

General Manager 12 responded “absolutely” when asked if he/she perceived the homeowners’ association board of directors as a benefit in overcoming community resistance to change. General Manager 12 characterized the homeowners’ association board of directors as a partner in addressing community affairs. General Manager 12 stated, “They listen. . . . Sometimes they will make a decision, and I am—afterwards—I will say, well, you know in doing that, that causes this and this, and this. And they are willing to re-look at it again.” General Manager 12 described his/her relationship with the homeowners’ association board of directors in the context of a two-way informational flow dynamic. General Manager 12 described this informational flow as “they either (a) know what is going on or (b) make sure I know what is going on.”

**Research Question 3.** The third research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive resistance to change by different generational cohorts?”

General Manager 12 identified the baby boomer generational cohort as most receptive to change within the participant’s community. General Manager 12 identified the baby boomer generation’s receptiveness to change with the following statement: “Now the baby boomers are in charge . . . and they are more participatory than any of the other groups.”

General Manager 12 identified the greatest generation as the generational cohort most resistant to change. General Manager 12 stated, “The greatest generation not only is not receptive. Okay. They have no intentions of changing things.” Continuing, General Manager 12 stated, “They have done what they have done. They are successful. They have retired, and by God, that is the way things are going to be.”

When asked if he/she agreed with the observation that changing generational cohort demographics are an area of concern for gated golfing communities, General Manager 12 responded, “Absolutely.” General Manager 12 commented that the golf participation rate in the participant’s community had remained stagnant over the past few years; however, “almost every other club I look at has decreasing membership in their golf—full golf membership. And the people who talk to me about that—the reason for it is there is decreasing people playing golf.” Additionally, General Manager 12 stated, “There are few millennials feeding into the system.”

### **Data Analysis by Common Themes in Research Questions**

After combining the responses of all 12 of the general managers, the researcher conducted an analysis to determine the most common themes within the combined semistructured interview data. The following sections present the common themes, by research question, as determined by the researcher’s analysis of the semistructured interview data in totality.

**Research Question 1.** The first research question was, “How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?” The combined general manager responses were coded and analyzed in NVivo QDAS to identify any common themes relative to Research Question 1. Table 40 identifies the common themes within the combined data corpus with reference to Research Question 1.

***Common Theme 1: The general manager serves as a coach, mentor, advisor, and advocate.*** Twelve of the 12 study participants (100%) referenced Bass and Riggio’s (2006) transformational leadership trait of individualized consideration in their interview



Table 40

*Combined Data Corpus Common Themes: Research Question 1*

Common theme	No. of source responses	Frequency of responses
The GM serves as a coach, mentor, advisor, advocate	12	58
The GM serves as a role model	11	39
Efficacy of transformational leadership	11	19
The GM instills a shared vision for the community	10	84
The GM encourages outside-the-box thinking	9	24

*Note.* GM = general manager.

responses. General managers responded via a diverse array of descriptors embodied by individualized consideration. General Manager 6 self-identified as a teacher, posing the question, “So we are teachers, aren’t we?” Dependent on the given situation, General Manager 1 stated, “I would call myself a manager, a coach, and a mentor to my staff.” General Manager 9 also self-identified as a mentor.

Several general managers referred to themselves as coaches. General Manager 3 stated, “I like to coach staff. I like to coach committees; I like to coach the board and let them make their own decisions.” General Manager 11 stated, “To me, it’s more coaching than discipline.”

The team paradigm and its importance to the general managers was evident in the semistructured qualitative interview responses. General Manager 2 stated, “I make sure I’m very close to the team.” General Manager 5 stated, “It’s more of a collaborative effort with our whole team here.” Continuing with a team paradigm, General Manager 7 stated, “I’ve always tried to lead through the team concept,” while General Manager 11 stated, “I try to create a very teamwork [oriented] environment.”

Finally, General Manager 8 stated, “I’m a consensus builder,” while General Manager 12 self-identified as a “facilitator.”

***Common Theme 2: The general manager serves as a role model.*** Eleven of the 12 study participants (92%) referenced Bass and Riggio’s (2006) transformational leadership trait of idealized influence in their qualitative interview responses. The study participants qualified being a role model through various descriptors: leading by example, management by walking around, and staying visible.

General Manager 5 stated, “I think you certainly need to lead by example.” General Manager 2, General Manager 6, and General Manager 1 each stated, “I lead by example.” General Manager 9 stated, “My style is that of a leader by example. I lead, and I treat people the way that I would expect them to treat and respect the members.”

General Manager 12 stated, “I manage by wandering around.” When asked if he/she was describing management by walking around, General Manager 8 stated, “That’s what I do. I forgot that one.” General Manager 10 described, “My personal leadership style is probably more hands-on, more encouraging, urging.”

General Manager 11 described the third descriptor of being a role model, staying visible, as follows: “I don’t have a desk job,” and “the most important part of the job as the general manager other than protecting the assets of the club, and all the other jargon, is to be seen out in front.” Finally, General Manager 2 stated, “I try to stay very visible.”

***Common Theme 3: Efficacy of transformational leadership.*** Eleven of the 12 study participants (92%) concurred with the statement that the four transformational leadership traits (individualized consideration, idealized influence, inspirational motivation, and intellectual stimulation) defined by Bass and Riggio (2006) were

efficacious in overcoming community resistance to change. A majority of participants stated that transformational leadership was a requisite to effect change in today's communities. Responses ranged from General Manager 4's statement, "I think that's imperative," to General Manager 7's statement, "If you want a change, you're going to have to use these principles to do it." General Manager 12 was unequivocal in the belief that transformational leadership is a requisite for successful community change by stating, "There is no way to get around it. You either have it, or you do not. If you do not, you are not successful."

General Manager 8 was the lone general manager who stated that transformational leadership was not a benefit when effecting community change. General Manager 8 stated, "I think transformational leadership works well with day-to-day management and the supervisor-peer relationship. But I'm not sure that it has that much to do [with] effecting change in a community."

***Common Theme 4: The general manager instills a shared vision for the community.*** Bass and Riggio's (2006) transformational leadership trait of inspirational motivation was evident in 10 of the 12 study participants' (83%) semistructured qualitative interview responses. In discussing the establishment of a community shared vision, several study participants stressed the importance of transparency.

General Manager 2 stated, "You need transparency," while General Manager 6 stated, "Transparency is a big key." General Manager 9 stressed the importance of transparency by stating, "The best thing that I feel you can do is be transparent and get what's really true out there." Finally, General Manager 11 stated, "Transparency is huge. I use that word around here a lot."

The importance of communication in establishing a shared vision was also emphasized by the study participants. General Manager 4 stated, “I think communication is absolutely key for any success.” General Manager 12 addressed the importance of communication in the response, “I try to keep everybody informed on what everybody is thinking,” while General Manager 2 stated, “It’s essential” when referring to open communication. Finally, when speaking of the relationship between communication and change initiatives, General Manager 6 stated, “I sell to the board, and the board sells to the membership.”

Developing a shared vision is a unique process for each general manager and each gated golfing community. For General Manager 5, the process was described as follows: “We sit down, and we agree on the goals and objectives together.” For successful community change, General Manager 6 stated, “You really have to make sure that vision is shared,” and “we build relationships, and we build trust, we build shared vision over time.” Finally, General Manager 7 stated, “The only way to get anything accomplished to make any change is to have everybody focused on that goal.”

***Common Theme 5: The general manager encourages outside-the-box thinking.***

Bass and Riggio’s (2006) transformational leadership trait of intellectual stimulation was evident in nine of the 12 study participants’ (75%) semistructured qualitative interview responses. General Manager 5 characterized his/her encouragement of followers’ intellectual stimulation with the following statement:

I always have been a risk taker, and if I think there’s a chance, I’m like, “Hey, let’s try it.” If we go down in flames, we go down in flames, and we change . . .

we've certainly changed how we do business here in 2 years. I wouldn't say 180 degrees, but maybe 110.

General Manager 2 expressed support for thinking outside the box by stating, "I get their [community members'/staff's] feedback. Oftentimes it helps to evolve a change that we're going to make into something that's a little better than what the initial idea was." General Manager 6 characterized it as having fun, stating, "The fun of it is to find that thing out of the box and always just say things that are just so—there's no way we can do it here, let's figure out how to do it here." General Manager 4 reported encouraging followers to take risks. General Manager 7 stated, "My foundation is that everybody's working together, and no idea is outside of the box." Finally, taking a contrary position, General Manager 8 stated that Bass and Riggio's (2006) transformational leadership trait of intellectual stimulation was the least important transformational leadership trait. When asked why they felt that way, General Manager 8 stated, "They [community members] already think outside the box plenty. They'd come out of left field a lot of times."

**Research Question 2.** The second research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?" The combined general manager responses were coded and analyzed in NVivo QDAS to identify any common themes relative to Research Question 2. Table 41 identifies the common themes within the combined data corpus with reference to Research Question 2.

Table 41

*Combined Data Corpus Common Themes: Research Question 2*

Common theme	No. of source responses	Frequency of responses
GM + HOA = teamwork	11	38
HOA as a partner to change	11	39
Liaisons for the change initiative	11	25
Advocating transparency	6	15

*Note.* GM = general manager; HOA = homeowners' association.

***Common Theme 1: General manager plus homeowners' association equals teamwork.*** Eleven of the 12 study participants (92%) identified the general manager working together with the homeowners' association board of directors as a benefit to effecting community change. The 12th general manager did not offer an opinion on the efficacy of the general manager working with a homeowners' association board of directors, as the organizational structure of his/her community did not include interactions between the general manager and the homeowners' association board of directors. The study participants provided numerous examples of the general manager working in conjunction with the homeowners' association board of directors to effect change. General Manager 3 stated,

We work together as a team between the board, the committees, people involved in the operation and they want to move the community forward. They don't want to get stuck and become just another community that has aged and fallen apart to neglect based on financial situations. They want to continue to move the community forward, so they have taken on a number of projects.

General Manager 11 stated, "Exactly, I get my things done at the committee level, and then by the time it gets to a board meeting, most of the time it's already done." General

Manager 7 stated, “I can go to them [homeowners’ association board of directors] and work through them easier than I can go to every single homeowner.” General Manager 7 continued,

These guys help me run the day to day of the club . . . they’ve got my back.

When I can go to them and work through them on something we want to change, we go through the board first. And then it goes out to the membership.

Finally, several general managers responded with short but direct responses concerning whether the homeowners’ association board of directors is a benefit when trying to effect change. General Manager 9, General Manager 4, and General Manager 12 responded, “Absolutely,” while General Manager 8 responded, “They’re an absolute benefit.”

***Common Theme 2: Homeowners’ association as a partner to change.*** Eleven of the 12 study participants (92%) identified the general manager working together with the homeowners’ association board of directors as a benefit to effecting community change. The 12th general manager did not offer an opinion on the efficacy of the general manager working with a homeowners’ association board of directors, as the organizational structure of his/her community did not include interactions between the general manager and the homeowners’ association board of directors. Examples of the homeowners’ association board members working as partners in community change initiatives include General Manager 11’s statement,

You just hit on something that’s so important: It’s getting people, whether it would be in some sort of leadership positions, that support the general manager in

areas of change has really been a huge success here, I can tell you that. We've got new blood on the board to match the new general manager.

General Manager 7 identified the partnering potential of the homeowners' association as being "super valuable because I can go to them and not have to worry about going to [a large number of homes]." General Manager 5 identified partnering opportunities with the homeowners' association board of directors as an integral part of the community change process. General Manager 5 described this partnering as follows:

We've put together ad hoc committees of a couple board members each and then staff members to look at stuff. So, there's one for finance and fees, there's one for governing documents, and then there's one for the facilities plan, and they present to the entire board and then to the membership. Then, when you get done with the focus groups, and it's something that the board is convinced we want to do, we, in fact, would not only have the board members to help facilitate that but would find member ambassadors to help promote that.

General Manager 3 identified the extensive knowledge of the homeowners' association board members as a benefit to partnering. In describing this, General Manager 3 stated, "There are some very well educated, 40, 50 years' experience in a particular industry that are educating me on the go. So, I really appreciate their input." Finally, General Manager 9 stated, "They're all very smart, successful people . . . so why would I not lean on their knowledge to a point?" General Manager 9 added,

So, I just try and lean on them where I can, advise, and I run stuff by them. How do they feel? They're my first line. If I'm going to want something, "What do



you think of this? Give me some feedback before I take it out to the general membership.”

***Common Theme 3: Liaisons for the change initiative.*** Eleven of the 12 study participants (92%) identified the general manager working together with the homeowners’ association board of directors as a benefit to effecting community change. The 12th general manager did not offer an opinion on the efficacy of the general manager working with a homeowners’ association board of directors, as the organizational structure of his/her community did not include interactions between the general manager and the homeowners’ association board of directors. General Manager 10 described the liaison role of the homeowners’ association board of directors with the following:

We have liaisons that go to each of the committees. There are two liaisons for each committee, and so they attend all of the committee [meetings] that they are assigned to. And they are active in the communication to and from those committees to the board, as well as communicating back [to the community], encouraging people to talk to the community about the things that are happening, things that we need to see done, or praising what has been done.

General Manager 4 described the liaison role of the homeowners’ association board of directors as follows: “Here on this property, we have several venues for communication to the community. One of those venues is specifically through the board communicating directly to the membership.” General Manager 3 described the liaison role in a sounding board characterization: “You can bounce ideas off of them individually and then of course collectively in a meeting with all of the material and data that you provide them to make a decision on something.” Finally, General Manager 9 stated,

They're liaisons. I think for me personally, the way I operate is to live in a community like this and to be successful; they're all very smart, successful people. They are, so why would I not lean on their knowledge to a point?

**Common Theme 4: Advocating transparency.** Six of the 12 study participants (50%) identified an advocacy role as a benefit of the homeowners' association board of directors. General Manager 6 stated, "At the end of the day, I will have no success on my own. It has to be what the members want." General Manager 3 stressed the importance of transparency when trying to introduce change to the community. General Manager 3 described this as follows:

It starts with having some trusted and influential people with the community buying into that [change] and then having them spread the word and having them hold their own little group meetings and neighborhood meetings to say, "This is why we've got to do this, and this is the impact."

General Manager 10 stated, "So, you have to figure out the transparency in order to prepare them [community members] for change." General Manager 1 made several statements with regard to transparency within a community, including, "You have got to be transparent," and "we went about it in a way of keeping them [community members] informed and transparent." Finally, General Manager 11 stated, "I think the big part of it is the fact that transparency is so important to the board."

**Research Question 3.** The third research question was, "How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?" The combined general manager responses were coded and analyzed in NVivo QDAS to identify any common

themes relative to Research Question 3. Table 42 identifies the common themes within the combined data corpus with reference to Research Question 3.

Table 42

*Combined Data Corpus Common Themes: Research Question 3*

Common theme	No. of source responses	Frequency of responses
Changing generational cohorts—a cause for concern	12	56
Greatest generation—the antichange generation	11	29
Baby boomers—the rebel leaders against change	9	24
Generation X—accepting of change	8	21
Millennials—change as a norm	8	25

***Common Theme 1: Changing generational cohorts—a cause for concern.***

Twelve of the 12 study participants (100%) stated that changing generational cohort demographics represent an area of concern for gated golfing communities. Study participant responses were varied, ranging from “I absolutely agree with that” and “I agree with that,” to “absolutely,” “I think it is a concern,” and “without question.” When asked to further elaborate on their responses, the study participants responded with varied and diverse causes for their concerns.

General Manager 2 stated the cause for concern is that “I think the millennials, and even Generation X a little bit, are not as willing to spend a day at something. The millennials, in particular, are very . . . they’re looking for the next satisfaction.” General Manager 12 stated, “Fifty-year-olds do more things than 80-year-olds do,” and “people now are buying on golf courses because they like the grass, not because they want to go out and golf.” General Manager 8 identified “less golf” and that “the baby boomer generation doesn’t seem to participate as much in the old-school country club activities

that the greatest generation did and still does.” In a similar vein to General Manager 2, General Manager 11 placed the root cause as “the reason why millennials don’t join private clubs is because they want to go to six or seven different places; they don’t want to go to the same place.” Finally, General Manager 1 stated, “We are putting more amenities in because the younger generation does not play golf, or they do, but it is a treat.”

***Common Theme 2: Greatest generation—the antichange generation.*** Eleven of the 12 study participants (92%) acknowledged the greatest generation generational cohort in their qualitative interview responses. Eight of the 12 study participants (67%) identified the greatest generation as the generational cohort most resistant to community change initiatives. General Manager 5 stated, “We have a number of those greatest generation members here. I think specifically, we’re looking at really updating our facilities, and that’s the toughest sell to that generation.” Additionally, General Manager 5 stated that the greatest generation’s resistance to change is “more for inconvenience than anything else. I really don’t think, in most cases, it’s a monetary factor.” General Manager 6 stated, “It’s an old group. And changing that group, getting flexibility out of that group isn’t going to happen.” General Manager 12 described the greatest generation’s resistance to change as follows: “The greatest generation not only is not receptive. . . . They have no intentions of changing things.” Finally, when asked which generational cohort was most resistant to change, General Manager 7 stated, “Definitely the greatest generation.”

***Common Theme 3: Baby boomers—rebel leaders against change.*** Nine of the 12 study participants (75%) acknowledged the baby boomer generational cohort in their

qualitative interview responses. Five of the 12 study participants (42%) identified the baby boomer generation as the generational cohort most resistant to community change. General Manager 11 described the baby boomers' resistance to community change as follows: "The baby boomers are a little bit more to the point of, 'This is what I'm used to' . . . they get stuck in their ways in a lot of different ways." General Manager 1 identified the baby boomers as the most resistant to community change unless their input is solicited first: "I would say it would be the baby boomers if you do not get their feedback." General Manager 3 stated, "Maybe baby boomers at some point, especially older baby boomers, they were so used to working for companies for 40 or 50 years and then retiring, and there was never any change in their program." Four of the 12 study participants (25%) identified the baby boomer generation as the generational cohort most accepting of community change.

While stating that the baby boomer generational cohort was the most resistant to change, General Manager 3 also stated, "There are a lot of baby boomers who embrace the change for the right reasons. I think they have had success in their life, and they realize success comes from change." General Manager 10 also stated that the baby boomers are more receptive to change as "they've been exposed to a little bit more computer knowledge, I think, and they have adapted probably a little bit better."

***Common Theme 4: Generation X—accepting of change.*** Eight of the 12 study participants (67%) acknowledged the Generation X generational cohort in their qualitative interview responses. Six of the 12 study participants (50%) acknowledged the Generation X generational cohort as the most accepting of community change. General Manager 5 attributed Generation X's acceptance of change to the fact "that they're young

enough that they are in touch with kind of what's going on social media-wise, news-wise, that they're still able to kind of change and accept it." General Manager 4 stated, "Generation X is the generation that really started evolving and understanding from a corporate structure." General Manager 7 stated, "Gen Xers are willing to see things from a different perspective," while General Manager 11 stated, "Gen X is way more receptive than the baby boomer generation; there's no question about it." Finally, General Manager 2 identified the millennials and Generation X as "the ones that are more receptive to change."

***Common Theme 5: Millennials—change as a norm.*** Eight of the 12 study participants (67%) acknowledged the millennial generational cohort in their qualitative interview responses. Five of the 12 study participants (42%) acknowledged the millennial generational cohort as the most accepting of community change. General Manager 4 described the millennial generational cohort as being "used to change. It's used to everything changing, very dynamically, very fluidly, and very quickly," while General Manager 1 stated, "Millennials and Gen Xers are the ones that are more receptive to change." General Manager 5 also stated that the millennial generational cohort is more receptive to change due to its members' comfort with technology: "The technology that they use and how they look at things. It's kind of like almost a Yelp generation in what they're looking for."

### **Summary**

This chapter presented a brief review of the study's purpose statement, associated research questions, the research methods and data collection procedures utilized, the study population, target population, and sample. Following this, the research data

analysis conducted by the researcher was presented by study participant and research question.

All 12 study participants identified the transformational leadership traits defined by Bass and Riggio (2006) as an efficacious means to overcome community resistance to change (Research Question 1). A majority of the participants stated that the homeowners' association board of directors is a benefit to general managers in overcoming community resistance to change (Research Question 2). Finally, a majority of the participants identified the generational cohorts most resistant to and most accepting of community change initiatives (Research Question 3). Differences among the general managers with regard to generational cohort classifications with reference to acceptance of and resistance to change were driven by the actual demographic composition of their respective communities.

The NVivo QDAS analysis of the semistructured qualitative interview data revealed common themes and patterns for each of the study's research questions. For Research Question 1, a total of five common themes and patterns were uncovered by the researcher:

- the general manager serves as a coach, mentor, advisor, and advocate;
- the general manager serves as a role model;
- efficacy of transformational leadership;
- the general manager instills a shared vision for the community; and
- the general manager encourages outside-the-box thinking.

A total of four common themes and patterns were uncovered for Research Question 2:

- general manager plus homeowners' association equals teamwork;

- homeowners' association as a partner to change;
- liaisons for the change initiative; and
- advocating transparency.

For Research Question 3, a total of five common themes and patterns were uncovered:

- changing generational cohorts—a cause for concern;
- greatest generation—the antichange generation;
- baby boomers—the rebel leaders against change;
- Generation X—accepting of change; and
- millennials—change as a norm.

The next chapter, Chapter V, presents the study's research findings in greater detail, conclusions, and recommendations for future studies.



## CHAPTER V: FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

Qualitative research is the practice of asking simple questions and getting complex answers. (Chenail, 1995, p. 8)

This chapter provides a concise summary of the study's findings, conclusions, and recommendations for future studies. The chapter begins with a short summation of the study's purpose, research questions, research methodology, population, and sample. The researcher then discusses the study's major findings and conclusions derived from the researcher's data analysis. The chapter concludes with a discussion of the implications for action of the research conducted, recommendations for future research, concluding remarks, and finally, the researcher's reflections on the associated research experience.

This study addressed the use of transformational leadership traits by general managers of gated golfing communities in Southern California's Coachella Valley to overcome community resistance to change. Furthermore, the study investigated the relationship between the general managers of gated golfing communities and their associated homeowners' association boards of directors while addressing community resistance to change in response to shifting generational cohort demographic demands.

### **Purpose Statement**

The purpose of this qualitative case study was to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary purpose was to explore and describe generational cohorts' resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley.

## **Research Questions**

This study utilized three research questions to focus and guide associated research efforts:

1. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?
2. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change?
3. How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?

## **Research Methods**

This study utilized a qualitative case study methodology. Merriam (1988) stated that the case study design is "chosen precisely because researchers are interested in insight, discovery, and interpretations rather than hypothesis testing" (p. 10). The case study methodology affords researchers a paradigm to conduct exhaustive analysis and observation of individuals, groups, or events within a clearly bounded space and time (Hancock & Algozzine, 2011; Patton, 2015; Yin, 2014). Given the above attributes, the researcher chose a qualitative case study methodology to obtain and collect detailed rich and thick qualitative data with reference to the perceptions of Coachella Valley gated golfing communities' general managers concerning the efficacy of transformational leadership in overcoming community resistance to change; the benefit, or liability, of the homeowners' association board of directors in overcoming community resistance to

change; and generational cohorts' acceptance of, or resistance to, community change initiatives.

A semistructured qualitative interview protocol was developed and utilized by the researcher for all study data collection efforts. The semistructured qualitative interview design affords the researcher discretion in question order and follow-on, or probing, questions within a conversational setting; however, each participant is asked the same set of standardized questions (Chenail, 2011; Harrell & Bradley, 2009; Turner, 2010).

After completion of the 12 semistructured qualitative interviews, the researcher analyzed and coded the data via the use of NVivo qualitative data analysis software (QDAS). Common themes and patterns in the responses of each participant and the collective responses of the group were noted and examined by the researcher relative to the study's three research questions.

### **Target Population and Sample**

The target population for this study consisted of Coachella Valley gated golfing community general managers. This target population was selected due to their proximity to, interaction with, and responsibility for gated golfing community change initiatives (Creswell, 2011; Rumsey, 2003). The target population consisted of approximately 42 Coachella Valley gated golfing community general managers.

Study participants were identified and solicited by the researcher via the use of nonprobability, purposeful, snowball sampling. Potential study participants were identified by participating gated golfing community general managers and individuals known personally to the researcher who resided in Coachella Valley gated golfing communities. Study participants were selected upon a positive reply stating their

willingness to participate in the research study. All of the study participants were actively serving in a general manager or equivalent organizational role within a Coachella Valley gated golfing community.

Twelve gated golfing community general managers participated in this study. All semistructured qualitative face-to-face interviews were conducted by the researcher at the general managers' gated golfing communities at a mutually agreed-upon time. Gated golfing communities from five different Coachella Valley cities were represented. Five study participants were from gated golfing communities located in Palm Desert, California. Four study participants were from the city of La Quinta, California. The cities of Indio, Indian Wells, and Palm Springs, California were each represented by a singular general manager.

### **Major Findings**

The three research questions first introduced in Chapter I focused on the perceptions of general managers of gated golfing communities concerning the efficacy of transformational leadership in overcoming resistance to change, the benefits of working with homeowners' association boards of directors while implementing community change initiatives, and generational cohorts' acceptance of and resistance to change initiatives. The data collected via qualitative interviews with 12 current gated golfing community general managers informed five major findings with reference to the study's three research questions. First, the data proved that transformational leadership is an effective leadership paradigm for instituting community change initiatives. Second, the data proved that working with the homeowners' association board of directors is an efficacious means for general managers to institute community change initiatives.

Finally, the data proved that general managers perceive generational cohorts' resistance to change differently based on their community's unique demographic composition. The major findings of this study, ordered by research question, are presented next.

### **Research Question 1**

*How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change?*

**Major Finding 1.** The first major finding was that 100% of the gated golfing community general managers reported the use of one or more transformational leadership traits as defined by Bass and Riggio (2006) to overcome resistance to change. The study participants represented Bass and Riggio's four transformational leadership traits of individualized consideration, idealized influence, inspirational motivation, and intellectual stimulation to varying degrees.

**Major Subfinding 1.1—individualized consideration.** Twelve of the 12 gated golfing community general managers (100%) described the use of leadership practices reflecting the transformational leadership trait of individualized consideration. Bass and Riggio (2006) characterized transformational leaders reflecting individualized consideration as those leaders focusing on the growth, advancement, and achievements of each individual follower. Additionally, transformational leaders serve as mentors and coaches to their followers. Kull (2003) stated that through individualized consideration, "the leader links followers' needs to the mission and vision" (p. 50). The use of individualized consideration by gated golfing community general managers is evidenced by a consistent focus on teamwork, consensus building, facilitation, and coaching while

engaged in organizational change processes. Yahaya and Ebrahim (2016) stated that through the use of individualized consideration, organizational leaders develop their followers into future leaders. Gated golfing community general managers utilize individualized consideration to develop both employees as future organizational leaders and community members as future community leaders.

**Major Subfinding 1.2—idealized influence.** Eleven of the 12 gated golfing community general managers (92%) described the use of leadership practices reflecting the transformational leadership trait of idealized influence. Bass and Riggio (2006) described idealized influence as transformational leaders' being admired, venerated, and respected by their followers who wish to emulate them. Transformational leaders take calculated risks and have strong moral and ethical codes. The gated golfing community general managers personified idealized influence through the use of descriptors such as leading by example, management by walking around, and staying visible. The 11 gated golfing community general managers embodying Bass and Riggio's transformational leadership trait of idealized influence did not make distinctions between organizational employees and community members as followers. What applied to one group was just as applicable to the other group when trying to overcome resistance to change (Bono & Judge, 2004).

**Major Subfinding 1.3—inspirational motivation.** Ten of the 12 gated golfing community general managers (83%) described the use of leadership practices reflecting the transformational leadership trait of inspirational motivation. According to Bass and Riggio (2006), transformational leaders exemplifying inspirational motivation are motivators and serve as an inspirational force for their followers. Transformational

leaders instill high levels of team spirit in their followers and instill a commitment to a shared organizational vision. The gated golfing community general managers incorporated this transformational leadership trait via advocating transparency and open communication in all matters (Bono & Judge, 2004; Flores, 2015).

***Major Subfinding 1.4—intellectual stimulation.*** Six of the 12 gated golfing community general managers (50%) described the use of leadership practices reflecting the transformational leadership trait of intellectual stimulation. Bass and Riggio (2006) described intellectual stimulation as transformational leaders' encouraging their followers to think outside the box. New ideas and approaches to solving organizational challenges are encouraged by transformational leaders. Transformational leaders stimulate creativity, innovation, and questioning of long-standing assumptions. The gated golfing community general managers personifying the transformational leadership trait of intellectual stimulation encouraged the free flow of ideas, risk taking, and ascertaining the best approach for a given situation and time (Yahaya & Ebrahim, 2016).

**Major Finding 2.** The second major finding associated with Research Question 1 was that 92% (11 of 12) of the study participants stated that the use of Bass and Riggio's (2006) transformational leadership traits (individualized consideration, idealized influence, inspirational motivation, and intellectual stimulation) was efficacious in overcoming resistance to change. The gated golfing community general managers stating the efficacy of transformational leadership in overcoming resistance to change were definitive in their affirmations. Statements such as "that's imperative," "if you want a change, you're going to have to use these principles to do it," and "[it] is a requisite" are representative of the comments received. These statements are examples of what

Poutiatine (2009) identified as “a component of active personal choice in transformational change” (p. 194). This finding from the study shows that a majority of general managers of gated golfing communities find transformational leadership, as defined by Bass and Riggio (2006), to be efficacious in overcoming resistance to change.

The one gated golfing community general manager who did not acknowledge the efficacy of transformational leadership traits in overcoming resistance to change made the distinction between the efficacy of transformational leadership in leader-employee relationships and the efficacy of such leadership in community change initiatives. This participant’s stated belief was that transformational leadership was effective within a leader-employee paradigm but not within a community change paradigm. Given this distinction, 100% of the gated golfing community general managers found transformational leadership to be efficacious within a leader-employee paradigm, and 92% of the gated golfing community general managers found transformational leadership to be efficacious within a community change paradigm.

### **Research Question 2**

*How do general managers of gated golfing communities in Southern California’s Coachella Valley perceive the importance of working with homeowners’ association boards of directors in overcoming resistance to change?*

**Major Finding 3.** The third major finding, addressing Research Question 2 of this study, was that 11 of the 12 gated golfing community general managers found their homeowners’ association boards of directors to be a benefit in overcoming resistance to change. The organizational structure of the 12th general manager’s community did not require interaction between the general manager and the homeowners’ association board



of directors. This finding from the study shows the positive effect of a homeowners' association board of directors within a gated golfing community paradigm.

Working as a cohesive team with the gated golfing community general managers, the members of homeowners' association boards of directors play a critical role in the change process serving as advocates, liaisons, communication conduits, and partners for community change initiatives. These roles fulfilled by the board members serve to reinforce the transformational leadership paradigm instilled by the general managers throughout a given change process. Gass (2010) identified this relationship as "being the change" (para. 7). The general manager and the homeowners' association board of directors working together engender greater community stakeholder acceptance and ownership of the change process.

### **Research Question 3**

*How do general managers of gated golfing communities in Southern California's Coachella Valley perceive resistance to change by different generational cohorts?*

**Major Finding 4.** Twelve of the 12 gated golfing community general managers (100%) stated that changing generational cohort demographics occurring within the United States and Canada represent an area of concern for gated golfing communities. This finding from the study confirms the impacts that ongoing generational cohort demographic changes are having on Coachella Valley gated golfing communities as introduced in Chapter I (Bohannon, 2017c; Vain, 2017a, 2017c).

The severity of the impacts to each community are dependent on a myriad of factors such as the age of the community's existing infrastructure, the addition and/or elimination of community amenities, the demographic composition of the membership

and staff, and funding stream availability. General managers of gated golfing communities must address these factors when contemplating community change initiatives to address generational cohort change impacts within their communities.

**Major Finding 5.** The fifth major finding of this study was that 12 of the 12 gated golfing community general managers (100%) stated that resistance to change exists within the generational cohorts as defined by Bump (2014). However, attribution of resistance to change to a specific generational cohort(s) varied across study participants.

**Major Subfinding 5.1—greatest generation/baby boomer generation.** Eleven of the 12 gated golfing community general managers (92%) characterized the greatest generation and baby boomer generation as the generational cohorts most resistant to community change efforts. This finding from the study confirms that resistance to change is an inherent component of Coachella Valley gated golfing communities and must be taken into consideration and planned for when contemplating community change initiatives.

**Major Subfinding 5.2—greatest generation.** Eight of the 12 gated golfing community general managers (67%) identified the greatest generation as the generational cohort most resistant to change. As with the previous subfinding, this finding from the study confirms that resistance to change is an inherent component of Coachella Valley gated golfing communities and must be taken into consideration and planned for when contemplating community change initiatives.

**Major Subfinding 5.3—baby boomer generation.** Five of the 12 gated golfing community general managers (42%) identified the baby boomer generation as the generational cohort most resistant to change. As with Major Subfindings 5.1 and 5.2, this

finding from the study confirms that resistance to change is an inherent component of Coachella Valley gated golfing communities and must be taken into consideration and planned for when contemplating community change initiatives.

***Major Subfinding 5.4—each generational cohort equally resistant.*** One gated golfing community general manager (8.33%) characterized each of the generational cohorts as being equally resistant to change, stating, “I mean at the end of the day, we all are humans. Again, in my experience, all humans are resistant to change.” As with the previous subfindings in this section, this finding from the study confirms that resistance to change is an inherent component of Coachella Valley gated golfing communities and must be taken into consideration and planned for when contemplating community change initiatives.

### **Unexpected Findings**

This study had no unexpected findings however, there were several unexpected researcher observations. The first unexpected researcher observation was the relatively young age of several study participant general managers given their respective community. The researcher expected a much older and more experienced general manager for these respective communities given their prestige and highly selective memberships.

The second unexpected researcher observation concerned the stated belief by one of the participating study general managers that the future majority composition of Coachella Valley general managers will be female. This is contrary to the existing demographic composition of Coachella Valley general managers that is majority male in nature as evidenced by 37 of the 40 general managers solicited for study participation

were male. This general manager stated that this observation is supported by current higher education hospitality program student bodies being majority female and that female general manager emotional intelligence (EQ) levels may be more receptive to the needs and wants of Generation X and the millennial generational cohorts.

The third unexpected researcher observation concerned the interrelationships and networking paths between and amongst the entirety of the Coachella Valley general manager cohort. Several of the participating general managers commented directly on how they rely on other general manager's support for unforeseen events and occurrences. Additionally, the researcher encountered study participants that had worked for another study participant in previous industry positions.

The final unexpected researcher observation concerned the characterization of public versus private communities. The researcher encountered several communities that promoted themselves as private gated golfing communities however, they have non-resident golf memberships and/or allow outside golfing play. These actions were instituted by the affected gated golfing community as a means to offset the decline in golfing interest and the recent economic sluggishness presented in Chapter II. Researcher discussions with Coachella Valley real-estate professionals further clouded the distinction between public versus private communities as some real-estate professionals consider a gated golfing community with outside members as no longer being a private community while other real-estate professionals stated that these communities were still private gated golfing communities. This lack of clarity concerning private versus public gated golfing communities was both surprising and unexpected to this researcher.

## **Conclusions**

Following an analysis of the five major findings from the study's data, the researcher was able to draw conclusions addressing the study's three research questions. The conclusions that follow address the research questions.

### **Conclusion 1**

The use of transformational leadership approaches is an efficacious leadership paradigm for overcoming resistance to change within gated golfing communities. All of the study participants identified the use of one or more transformational leadership traits in their current day-to-day leadership and management efforts.

When addressing community resistance to change, the study participants described being mentors and coaches, being role models, building a shared community vision, and encouraging risk taking and thinking outside the box to address community change initiatives. Each of these descriptors used by the study participants relates to one of the transformational leadership traits defined by Bass and Riggio (2006). Being a mentor and coach describes the transformational leadership trait of individualized consideration. Striving to be a role model characterizes the transformational leadership trait of idealized influence. The building of a community vision exemplifies the transformational leadership trait of inspirational motivation. And finally, encouraging risk taking and thinking outside the box characterizes the transformational leadership trait of intellectual stimulation.

This study demonstrates that the transformational leadership paradigm is already an active component of change initiatives and currently being utilized within Coachella Valley gated golfing communities to address resistance to change. The study further

demonstrates that transformational leadership is an exemplary means to address resistance to change inherent to generational cohorts, particularly the greatest generation and baby boomer generational cohorts, currently found throughout the Coachella Valley.

## **Conclusion 2**

The use of transformational leadership is an efficacious leadership paradigm for developing a strong leadership continuum within gated golfing communities to address and overcome resistance to change. A transformational leadership paradigm encourages open communication, liaisons, teamwork, and broad levels of participation. The homeowners' association governance paradigm is also intended to accomplish these same objectives. Doherty (2000) stated that the homeowners' association is "arguably one of the most important community structures unfolding on the local landscape today" (p. 3). This study confirms the importance of the homeowners' association board of directors working in conjunction with the general manager as a team to further and advance community integration.

A gated golfing community general manager utilizing a transformational leadership paradigm working in conjunction with the homeowners' association board of directors results in a synergetic team able to address resistance to change within gated golfing communities at multiple levels to include employees and community members. This study shows the efficacy of the collaboration of the general manager and homeowners' association board of directors as a synergetic team. The study's data show that gated golfing community general managers working as a cohesive team with their homeowners' associations can plan for and execute community change initiatives. The study's data also show that failed change initiatives can be directly attributed to the

failure of the gated golfing community general managers and their homeowners' association boards of directors to function as a cohesive team.

### **Conclusion 3**

The use of transformational leadership is an efficacious leadership paradigm to address the shifting generational cohort demographics within gated golfing communities. The literature shows that the Generation X and millennial generational cohorts are very different in nature and characteristics from the greatest generation and baby boomer generational cohorts. The study's data support this observation. The aging out of the greatest generation at the top demographic boundary and the introduction of Generation X and the millennial generation at the bottom demographic boundary of gated golfing communities has created a necessity for change within these communities. This change covers a broad swath incorporating reduced golf activity and interest, addition of new amenities, elimination of existing amenities, and interactions between and within the generational cohorts themselves. Each of these factors can and does result in community resistance to change. More importantly, the magnitude and type of change manifested is inherently unique to each community, necessitating a tailored approach to community change efforts. This study's data show that the transformational leadership paradigm is efficacious in deriving, implementing, and executing this tailored approach.

Chapter I introduced three factors impacting any organization. The first factor was that the need for organizational change is pervasive and constant in today's world. The second factor was that stakeholder demographics are driving the need for organizational change (Barker, 1998; Breakey, n.d.; Eisold, 2010). The third and final factor was that organizational resistance to change is also pervasive and constant

(Breakey, n.d.; Eisold, 2010). The study's data show that a transformational leadership paradigm can assist with recognizing, addressing, and overcoming each of these three factors.

### **Implications for Action**

Several implications for action were derived from the above-stated conclusions to afford gated golfing community general managers processes to overcome resistance to change within their respective communities. The researcher-provided recommendations are intended to assist general managers of gated golfing communities when facing resistance to change. Proposed organizations and entities responsible for implementation of the researcher-generated recommendations are embedded in each implication for action.

#### **Implication for Action 1**

This study revealed that a transformational leadership paradigm is efficacious in overcoming community resistance to change. This study also revealed that none of the participating general managers were conversant with the transformational leadership paradigm or considered themselves transformational leaders.

Educational and credentialing organizations such as university hospitality programs and the Club Managers Association of America (CMAA), the Community Associations Institute (CAI), and the Professional Golfers' Association of America (PGA) should implement transformational leadership programs/areas of focus in their existing educational and credentialing continuums. These programs/areas of focus should address the four transformational leadership traits of individualized consideration, idealized influence, inspirational motivation, and intellectual stimulation. These



transformational leadership educational/credentialing programs/areas of focus should include applicable case studies and personal testimonials from diverse community settings demonstrating the use of transformational leadership in overcoming resistance to change in gated golfing communities. Examples and testimonials of failed change initiatives should also be integrated to provide a compare-and-contrast opportunity for participating individuals.

### **Implication for Action 2**

This study revealed that transformational leadership is efficacious in developing and nurturing a strong relationship between the general manager and homeowners' association board of directors. While all of the study participants identified the homeowners' association board of directors as an asset and benefit when addressing resistance to change, the literature shows that this is not always the case.

Educational, credentialing, and trade consultancy organizations such as university hospitality programs, the CMAA, the CAI, the PGA, and the McMahon Group, to name just a few, should stress the importance and benefits of a cohesive and synergistic team approach between the general manager and the homeowners' association board of directors. For the educational and credentialing entities, this emphasis should be added to their educational/credentialing continuums. For the trade consultancy organizations, the benefits of a synergistic team should be emphasized during site visits and in their respective newsletters and journals.

### **Implication for Action 3**

This study confirmed that shifting generational demographics represent an area of concern for gated golfing communities. This study also showed that the use of

transformational leadership is efficacious in overcoming resistance to change as general managers of gated golfing communities effect community change to address this shifting generational demographic environment.

Trade consultancy and trade credentialing organizations should query their memberships for successful approaches to recognizing, adapting to, and implementing change to address the generational cohort demographic changes. While this study showed that each gated golfing community has unique characteristics, a comprehensive listing of successful change initiatives that have already been undertaken would prove to be beneficial to other gated golfing community general managers contemplating change initiatives. This study showed that Generation X and the millennial generation are more diverse in their needs and wants than the greatest generation and baby boomer generational cohorts. Any listing of best practices or optimal change initiatives should address the unique characteristics of the Generation X and millennial generational cohorts to ensure the optimal expenditure of gated golfing community financial and infrastructure resources.

### **Recommendations for Further Research**

The findings from this qualitative case study provide several opportunities for additional research concerning the use of transformational leadership to overcome resistance to change, the homeowners' association governance paradigm associated with gated golfing communities throughout the United States and Canada, and the implications of shifting generational demographics. Recommendations for addressing these topics include the following:

1. This study looked at gated golfing communities within the Coachella Valley in Southern California. To further add to the body of knowledge, this study should be replicated in other areas of the United States and Canada.
2. A comparative study should be conducted between geographic areas with high snowbird/seasonal occupancy, such as the Coachella Valley and Phoenix, and nonseasonal geographic areas, such as San Diego or Houston, to determine if there is a discernible difference between seasonal communities' and year-round communities' levels of resistance to change. This study could be delimited to gated golfing communities, gated communities, tennis communities, and so forth.
3. This study was delimited to gated golfing communities. This study should be repeated in other gated communities (tennis, nongolfing, etc.) to compare and contrast the efficacy of transformational leadership in overcoming community resistance to change within these communities and gated golfing communities.
4. This study did not look at the organizational structure of the community beyond the presence of a homeowners' association. Throughout this study, the researcher was presented with differing organizational structures for each community. A study should be conducted to determine if there is an optimal organizational structure to facilitate community change. Example structures include equity ownership by the membership, developer ownership, corporate ownership of the community amenities, a public versus private community, and/or a hybrid organization of these various elements.
5. This study had limited female general manager participation. A comparative study between female general managers and male general managers should be conducted to

explore differences in the efficacy determination of transformational leadership in overcoming community resistance to change.

6. A comparative study should be conducted between general managers, boards of directors, and community members of gated golfing communities to determine if differing perceptions of transformational leadership efficacy exist within a community.
7. This study only looked at the transformational leadership paradigm. A comparative study should be conducted to determine the efficacy of other leadership paradigms in overcoming community resistance to change.
8. This study confirmed that shifting generational cohort demographic trends are an area of concern for gated golfing communities through a transformational leadership lens. A comparative study should be conducted to assess the efficacy of emotional intelligence versus transformational leadership in addressing the younger generational cohorts' needs, wants, and desires.
9. This study did not delimit the general managers' leadership interactions. A comparative study should be conducted to determine if the efficacy of transformational leadership varies between general managers' interactions with staff and general managers' interactions with community members.
10. A comparative study should be conducted to ascertain if a particular transformational leadership trait (idealized influence, inspirational motivation, intellectual stimulation, or individualized consideration) is more efficacious than others in overcoming community resistance to change.

## **Concluding Remarks and Reflections**

This study's findings are significant as they inform and add to the body of literature addressing community change, the inherent organizational resistance to those same change initiatives, and the impending impacts of future generational cohorts on existing gated golfing communities. This study provided keen insights into addressing these three leadership challenges from individuals facing these very issues. These insights can assist educational institutions and professional credentialing organizations in providing a more effective educational underpinning and training/credentialing continuums for both current and future community leaders.

As a younger member of a gated golfing community who has served on various community committees within the homeowners' association context, the researcher was able to relate to, and in many cases had personal experience of, the challenges facing the participating general managers as they attempt to institute change within their communities. Listening to the study participants describe their struggles, triumphs, and visions of the future was truly inspiring. The pride and passion that each of the study participants had for his or her respective community was evident. The researcher gained significant insights and knowledge listening to each general manager as he or she told his or her story. What worked, what did not work, and what sort of worked were all freely presented. There was no holding back. For that, I am truly grateful.

The researcher believes these findings can inform future gated golfing community change initiatives. This study confirmed that gated golfing communities are facing uncertainty as a result of changing generational cohorts. It also confirmed that

communities are aware of this challenge and are taking concerted actions to address it. Some communities are further along than others in this effort.

The researcher desires that these findings be published to help support and inform ongoing change initiatives within gated golfing communities as they address and adapt to changing community demographic compositions as a result of transitioning generational cohorts. As the Generation X and millennial generational cohorts continue their transition to the forefront of society, gated golfing communities within the Coachella Valley, the state of California, and elsewhere will be faced with necessary change initiatives to remain relevant. Given a choice between a community that has embraced change and one that has not, the younger generational cohorts will choose the one that has embraced change.

The introduction, implementation, and embracing of transformational leadership can assist community leadership in addressing and overcoming the inevitable resistance to change inherent to all organizational change initiatives. To paraphrase one of the study participants, “Community change is necessary. If we don’t change, we stagnate. If we stagnate, we die as a community.” Hopefully, in some small way, this study will help prevent that tragedy from occurring.

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## APPENDICES

## APPENDIX A

### CMAA Management to Leadership Model Permission for Use

**From:** Jason Koenigsfeld Jason.Koenigsfeld@cmaa.org  
**Subject:** RE: CMAA Management to Leadership Model - Permission for Use  
**Date:** September 5, 2017 at 11:35  
**To:** Shaun Hillis shaun.hillis@icloud.com, Will Flourance Will.Flourance@cmaa.org  
**Cc:** Amilcar Davy amilcar.davy@cmaa.org, Sarah Bal Sarah.Bal@cmaa.org



Hi Shaun,

Thank you for your email. We appreciate you reaching out to us regarding the Management to Leadership Model. Please feel free to use it but also know we would love to get a copy of your research so we too can learn from what you are studying. Thank you and have a great day and best of luck with your dissertation.

Kind regards,

Jason

Jason P. Koenigsfeld, Ph.D, CHE  
Sr. Vice President, Professional Development  
Club Managers Association of America  
1733 King Street  
Alexandria, VA 22314  
(p): 703-739-9500  
(f): 703-739-0124

*"**The Club Managers Association of America** advances the profession of club management by fulfilling the **educational** and related needs of its members."*

From: **Shaun Hillis** shaun.hillis@icloud.com  
Subject: CMAA Management to Leadership Model - Permission for Use  
Date: September 2, 2017 at 14:07  
To: will.flourance@cmaa.org  
Cc: jason.koenigsfeld@cmaa.org

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Mr. Flourance,

My name is Shaun Hillis and I am a Doctoral Candidate within the Doctor of Education program at Brandman University. My research is focused on the use of transformational leadership by gated golf community General Managers to overcome community resistance to change. I would like to inquire into the feasibility of receiving permission to utilize the CMAA Management to Leadership model as a figure within my dissertation's literature review.

The figure is located at the following address:  
<http://www.cmaa.org/uploadedImages/About/mgtldgraph.jpg>

The figure will have an appropriate citation listing CMAA as the source and copyright holder.

I thank you for your time and assistance with this request.

Respectfully,  
Shaun Hillis

APPENDIX B

**Coachella Valley Gated Golfing Communities**

D. Williams <sup>a</sup>	Mason <sup>b</sup>	Bennion Deville Homes <sup>c</sup>
Andalusia Golf Club	Andalusia Golf Club	Andalusia Golf Club
Avondale Golf Club	Avondale Golf Club	Avondale Golf Club
Bermuda Dunes Country Club	Bermuda Dunes Country Club	Bermuda Dunes Country Club
Bighorn Golf Club	Bighorn Golf Club	Bighorn Golf Club
		Cathedral Canyon Golf Club
		Cathedral Canyon Country Club
		Cathedral Canyon PS
Chaparral Country Club	Chaparral Country Club	Chaparral Country Club
Desert Falls Country Club	Desert Falls Country Club	Desert Falls Country Club
		The Estates at Desert Falls
		The Links at Desert Falls
Desert Horizons Country Club	Desert Horizons Country Club	Desert Horizons Country Club
Desert Island Golf & Country Club	Desert Island Golf & Country Club	Desert Island Golf & Country Club
		Desert Princess Golf & Country Club
		Desert Princess Country Club Condos
		Desert Princess Single Family
Eldorado Country Club	Eldorado Country Club	Eldorado Country Club
Heritage Palms Golf Club	Heritage Palms Country Club	Heritage Palms Country Club
		Indian Palms Country Club
Indian Ridge Country Club	Indian Ridge Country Club	Indian Ridge Country Club
Indian Springs Golf Club		Indian Springs Country Club
Indian Wells Country Club	Indian Wells Country Club	Indian Wells Country Club
Ironwood Country Club	Ironwood Country Club	Ironwood Country Club
La Quinta Country Club	La Quinta Country Club	La Quinta Country Club
		La Quinta Country Club Estates
		La Quinta Country Club Golf Estates
		La Quinta Country Club Club Lago LQ
		La Quinta Country Club Montero Estates
Marrakesh Country Club	Marrakesh Country Club	Marrakesh Country Club
Mission Hills Country Club	Mission Hills Country Club	Mission Hills Country Club
		Mission Hills Country Club Deane Homes
		Mission Hills Country Club Legacy-Oakhurst
		Mission Hills Country Club Oakmont Estates
Monterey Country Club	Monterrey Country Club	Monterrey Country Club
Mountain View Country Club	Mountain View Country Club	Mountain View Country Club
Oasis Country Club	Oasis Country Club	Oasis Country Club
Palm Desert Resort and Country Club	Palm Desert Resort and Country Club	Palm Desert Resort and Country Club
Palm Valley Country Club	Palm Valley Country Club	Palm Valley Country Club



D. Williams <sup>a</sup>	Mason <sup>b</sup>	Bennion Deville Homes <sup>c</sup>
PGA West	PGA West	PGA West PGA West Greg Norman Course PGA West Nicklaus Private Course PGA West Nicklaus Tournament Course PGA West Palmer Private Course PGA West Stadium Course PGA West Weiskopf Course The Legends at PGA West Rancho La Quinta Country Club
Rancho La Quinta Country Club	Rancho La Quinta Country Club	Rancho La Quinta Country Club
Rancho Las Palmas Country Club	Rancho Las Palmas Country Club	Rancho Las Palmas Country Club
Rancho Mirage Country Club	Rancho Mirage Country Club Shadow Mountain Resort & Club	Rancho Mirage Country Club
Sun City Palm Desert	Stone Eagle Golf Club	Stone Eagle Golf Club
Sun City Shadow Hills	Sun City Palm Desert	Sun City Palm Desert
Sunrise Country Club	Sun City Shadow Hills	Sun City Shadow Hills
Tamarisk Country Club	Sunrise Country Club	Sunrise Country Club
The Citrus Club	Tamarisk Country Club	Tamarisk Country Club
The Club at Morningside	The Citrus Club	The Citrus Club
The Golf Club at La Quinta	The Club at Morningside	The Club at Morningside
The Hideaway Golf Club	The Hideaway Golf Club	The Hideaway Golf Club
The Lakes Country Club	The Lakes Country Club	The Lakes Country Club
The Madison Club	The Madison Club	The Madison Club
The Palms Golf Club	The Palms Golf Club	
The Quarry at La Quinta	The Quarry at La Quinta	The Quarry at La Quinta
The Reserve Club	The Reserve Club	The Reserve Club
The Springs Country Club	The Springs Country Club	The Springs Country Club
The Vintage Club	The Vintage Club	The Vintage Club
Thunderbird Country Club	Thunderbird Country Club	Thunderbird Country Club
Toscana Country Club	Toscana Country Club	Toscana Country Club
Tradition Golf Club	Tradition Golf Club	Tradition Golf Club
Trilogy Golf Club		Trilogy at La Quinta
Woodhaven Country Club	Woodhaven Country Club	Woodhaven Country Club

<sup>a</sup>Adapted from “Country Clubs and Golf Courses in Coachella Valley,” by D. Williams, n.d.-a, (<http://dianewilliamsandassociates.com/golf-course-communities/country-clubs-and-golf-course-communities-in-coachella-valley/>). <sup>b</sup>Adapted from “Desert Country Clubs,” by P. Mason, n.d., (<http://www.golfpropertiesonline.com/desert-country-club>). <sup>c</sup>Adapted from “Country Clubs,” by Bennion Deville Homes, n.d., (<http://www.bdhomes.com/country-club-directory>).

## APPENDIX C

### North American Demographic Age Cohorts

Generational cohort	Birth years	Description	Source
Progressive generation	1843-1859	~22M births. Characterized by an adaptive nature. Influenced by the Civil War and a societal missionary awakening.	Strauss and Howe (1991)
Missionary generation	1860-1882	~45M births. Characterized by an idealistic nature. Influenced by the end of the civil war in childhood, a missionary awakening in adulthood, the Great Depression, and World War II in their elder years.	A. Ford and Dodds (2013); Strauss and Howe (1991)
Lost generation	1883-1900	~45M births. Characterized by a reactive nature. Influenced by massive immigration and urban poverty, a missionary awakening in youth and the Great Depression and World War II during midlife.	A. Ford and Dodds (2013); Strauss and Howe (1991)
Lost generation	1883-1900	~48.5M births.	Howe and Strauss (2000)
G.I. generation	1901-1924	~63M births. Characterized by a civic nature. Influenced by the Great Depression and World War II in early adulthood.	Strauss and Howe (1991)
G.I. generation	1901-1924	~74.4M births.	Howe and Strauss (2000)
GI generation	1901-1926	This generation fought World War II.	Underwood (2007)
Greatest generation	1901-1924	“This generation of Americans has a rendezvous with destiny” (Franklin Roosevelt, 1936 Democratic Convention).	A. Ford and Dodds (2013)
Greatest generation	1901-1927	~47M births.	Fry (2016a, 2016b)
Greatest generation	< 1945	This generational cohort fought World War II.	Bump (2014)
Traditionals	< 1945	Generation defined by the traditional family, Judeo-Christian paradigm, discipline, and obedience	Kupperschmidt (2000); Shaw (2013)
Traditionals	< 1945	A generation defined by economic hardship.	Birkman (2016)
Traditionalists	1927-1942	~47M births. Characterized by a sense of conformity. Influenced by the Great Depression and World War II. Formative years were the 1930s to 1960s.	Diaz-Martin (2015)

Generational cohort	Birth years	Description	Source
Veteran	1922-1943	~27.9M births. Defined by the Great Depression and World War II.	L.-V. Cox (2016); De Long (2010); Zemke, Raines, and Filipczak (2013)
Veterans	1922-1943	Characterized by dedication, strong work ethic, and respect for authority. Influenced by the Great Depression and World War II.	Arsenault (2004); L.-V. Cox (2016); Zemke et al. (2013)
Veterans	1925-1945	Defined by economic hardship, and the Great Wars.	Hendricks and Cope (2013)
Matures	< 1945	Defined by the Great Depression and World War II.	L.-V. Cox (2016); Lyons, Duxbury, and Higgins (2007)
Silent generation	1925-1942	~49M births. Characterized by an adaptive nature. Influenced by the Great Depression, World War II and a midlife boom awakening.	A. Ford and Dodds (2013); Howe and Strauss (2000); Strauss and Howe (1991)
Silent generation	1925-1942	~54.9M births.	Howe and Strauss (2000)
Silent generation (traditionalists)	1925-1945	1 of 4 generational cohorts in the workforce.	Schullery (2013)
Silent generation	1927-1945	~46.5M births. Born too late to participate in World War II and too early to be caught up in the social activism of the 1960s. This generation's formative years were the 1930s to 1960s.	Underwood (2007)
Silent generation	1928-1945	~47M births.	Fry (2016a, 2016b)
Baby boom generation	1940-1960	Characterized by individualism, consensus leadership, idealism.	Kupperschmidt (2000)
Boom generation	1943-1960	~79M births. Characterized by an idealistic nature. Influenced by a boom awakening in early adulthood.	A. Ford and Dodds (2013); Howe and Strauss (2000); Strauss and Howe (1991)
Baby boom generation	1943-1960	Defined by introspection and self-absorption.	Twenge (2014)
Baby boomer generation	1944-1960	~76.7M births. Defined by the civil and women's rights movements and the Vietnam War.	L.-V. Cox (2016); De Long (2010); Zemke et al. (2013)
Baby boomer generation	1945-1964	Defined by self-motivation, an expectation of prosperity, and satisfaction.	L.-V. Cox (2016); Lyons et al. (2007)
Baby boomer generation	1946-1964	1 of 4 generational cohorts in the workforce.	Schullery (2013); Shaw (2013)

Generational cohort	Birth years	Description	Source
Baby boomer generation	1946-1964	~80M births. Characterized by a sense of empowerment and strong work ethic. Formative years were the 50s and early 60s.	Diaz-Martin (2015)
Baby boomer generation	1946-1964	The post-World War II generation.	Bump (2014)
Baby boomer generation	1946-1964	Characterized by a sense of entitlement. Dedicated and driven.	Hendricks and Cope (2013)
Baby boomer generation	1946-1964	The Woodstock generation.	M. Johnson and Johnson (2010)
Boomer generation	1946-1964	~80M births. This generation's formative years were the 1950s, 1960s, and 1970s.	Underwood (2007)
Baby boom generation	1946-1964	~76M births.	Fry (2016a, 2016b)
Thirteenth generation	1961-1981	~93M births. Characterized by a reactive nature. Influenced by a boom awakening in early youth.	Strauss and Howe (1991)
Generation X	1960-1980	~49.1M births. Defined by Watergate, the collapse of the Soviet Union, and the first Persian Gulf War (Operation Desert Storm).	De Long (2010); Fry (2016a); Kupperschmidt (2000); Zemke et al. (2013)
Generation X	1961-1980	"Latchkey" kids, working moms, divorce.	A. Ford and Dodds (2013)
Gen-X	1961-1981	~93M births.	Howe and Strauss (2000)
Generation X	1961-1981		Twenge (2014)
Generation X	1965-1979	Defined by self-reliance, independence, and an acceptance of change.	L.-V. Cox (2016); Lyons et al. (2007)
Generation X	1965-1980	~55M births.	Fry (2016a, 2016b)
Generation X	1965-1980	Latchkey kids, divorce, and working moms.	Birkman (2016); M. Johnson and Johnson (2010)
Gen Xers	1965-1980	1 of 4 generational cohorts in the workforce.	Shaw (2013)
Generation X	1965-1981	1 of 4 generational cohorts in the workforce.	Schullery (2013)
Generation X	1965-1981	Characterized by a strong sense of independence and self-reliance. Formative years were the late 1960s and 1970s.	Diaz-Martin (2015)

Generational cohort	Birth years	Description	Source
GenX	1965-1981	~58M births. Individualism and diversity characterize this generation. This generation's formative years were the 1970s, 1980s, and 1990s.	Underwood (2007)
Generation X	1965-1984	Uncertainty and turmoil characterize this generational cohort.	Bump (2014)
Generation Y	1980-2000	~73.5M births. Defined by technology, the environment, and multiculturalism.	L.-V. Cox (2016); De Long (2010); Zemke et al. (2013)
Generation Y	1981-1995	The entitled generation.	M. Johnson and Johnson (2010)
Millennial generation	> 1980	Defined by rapid technological change, globalization, and independence.	L.-V. Cox (2016); Lyons et al. (2007)
The millennials	1980-2000	Post 9/11 generation.	A. Ford and Dodds (2013)
Millennial generation	1980-2000	Adaptable to change. Technology-dependent.	Hendricks and Cope (2013)
Millennial generation	1981-1997	~66M births.	Fry (2016a)
Millennial generation	1981-1997	The child-centric generation. The largest generation in the workforce.	Birkman (2016)
Millennials	1981-2001	1 of 4 generational cohorts in the workforce.	Shaw (2013)
Millennial generation	1982-1991 <sup>a</sup>	~76M births. Possibly characterized by a civic nature.	Strauss and Howe (1991)
Millennial generation (generation me)	1982-1999	Defined by a blasé attitude and sense of uniqueness.	Twenge (2014)
Millennial generation	1982-1999	1 of 4 generational cohorts in the workforce.	Schullery (2013)
Millennial generation	1982-2002	~100.2M births.	Howe and Strauss (2000)
Millennial generation	1982-2004	Defined by technological change and the millennium transition.	Bump (2014)
Millennial generation	1982-2007 <sup>a</sup>	>80M births. Characterized by optimism and enthusiasm. Formative years were the 1980s, 1990s, and 2000s.	Diaz-Martin (2015)
Millennial generation	1982-2007 <sup>a</sup>	>80M births. This generation is exceptionally close to their parents, optimistic, enthusiastic, education-oriented, and compassionate. This generation's formative years were the 1980s onward.	Underwood (2007)

<sup>a</sup>When the work was released, the millennial generation was still “open.” This end date reflects the publishing date of the material. Subsequent works by the same authors revised the dates for the generation.

APPENDIX D

Literature Review Synthesis Matrix

	Research Methods	Coachella Valley (CV)	General Managers (GM)	GM Competencies	CV Golf	Gated Communities	HOA/HOA Governance	Demographics	Organizational Change	Resistance to Change	Transformational Leadership
Ackerman-Anderson, L. (2016, January). <i>Launching successful transformation</i> . Paper presented at the Brandman University Immersion, Irvine, CA.									X		X
Ackerman-Anderson, L., & Anderson, D. (2010). <i>The change leader's roadmap: How to navigate your organization's transformation</i> (2nd ed.). San Francisco, CA: Pfeiffer.									X	X	X
Adcroft, A., Willis, R., & Hurst, J. (2008). A new model for managing change: The holistic view. <i>Journal of Business Strategy</i> , 29(1), 40-45. doi:10.1108/02756660810845697									X		X
Ahmad, H., & Ibrahim, B. (2015). Leadership and the characteristic of different generational cohort towards job satisfaction. <i>Procedia - Social and Behavioral Sciences</i> , 204(Suppl. C), 14-18. doi:10.1016/j.sbspro.2015.08.104			X			X		X			
Al-Haddad, S., & Kotnour, T. (2015). Integrating the organizational change literature: A model for successful change. <i>Journal of Organizational Change Management</i> , 28(2), 234-262. doi:10.1108/JOCM-11-2013-0215									X	X	
Anderson, D., & Ackerman-Anderson, L. (2010). <i>Beyond change management: How to achieve breakthrough results through conscious change leadership</i> (2nd ed.). San Francisco, CA: Pfeiffer.									X		X
Appelbaum, S. H., Degbe, M. C., MacDonald, O., & Nguyen-Quang, T.-S. (2015a). Organizational outcomes of leadership style and resistance to change (Part One). <i>Industrial and Commercial Training</i> , 47(2), 73-80. doi:10.1108/ict-07-2013-0044									X	X	

Appelbaum, S. H., Degbe, M. C., MacDonald, O., & Nguyen-Quang, T.-S. (2015b). Organizational outcomes of leadership style and resistance to change (Part Two). <i>Industrial &amp; Commercial Training</i> , 47(3), 135-144. doi:10.1108/ICT-07-2013-0045										X	X	
Appelbaum, S. H., Habashy, S., Malo, J.-L., & Shafiq, H. (2012). Back to the future: Revisiting Kotter's 1996 change model. <i>Journal of Management Development</i> , 31(8), 764-782. doi:10.1108/02621711211253231										X		
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Platt, E. (2015). <i>Exploration of the relationship between authentic and transformational leadership in female leaders</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3738412)											X
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Pollack, M. C. (2013). Judicial deference and institutional character: Homeowners associations and the puzzle of private governance. <i>University of Cincinnati Law Review</i> , 81(3), 839-895.							X				

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Raelin, J. A. (2003). <i>Creating leaderful organizations: How to bring out leadership in everyone</i> . San Francisco, CA: Berrett-Koehler.										X		
Rahe, L. T. (2002). The right to exclude: Preserving the autonomy of the homeowners' association. <i>The Urban Lawyer</i> , 34(2), 521-552.							X	X				
Reddin, W. J. (2010). 3-D theory of managerial effectiveness. In J. T. McMahon (Ed.), <i>Leadership classics</i> (pp. 306-312). Long Grove, IL: Waveland Press.												X
Roberts, C. M. (2010). <i>The dissertation journey</i> (2nd ed.). Thousand Oaks, CA: Corwin Press.	X											
Robinson, M. (2005). <i>Tenure of managers in the private club industry: An analysis of demographic, job content, and organizational contributing factors</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3162629)				X	X		X					
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Rogers, W. H. (2004). <i>Assessing the market for institutions: The case of homeowner associations</i> (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3143852)						X	X					
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Sanchez, T. W., Lang, R. E., & Dhavale, D. M. (2005). Security versus status? A first look at the census's gated community data. <i>Journal of Planning Education and Research</i> , 24(3), 281-291. doi:10.1177/0739456X04270127						X	X	X				

Sastry, M. A. (1997). Problems and paradoxes in a model of punctuated organizational change. <i>Administrative Science Quarterly</i> , 42(2), 237-275. doi:10.2307/2393920										X		
Schein, E. H. (2004). <i>Organizational culture and leadership</i> (3rd ed.). San Francisco, CA: Jossey-Bass.										X		
Scheller, D. S. (2010). <i>The political economy of neighborhood governance</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3462352)						X	X					
Scheller, D. S. (2016). Neighborhood hierarchy of needs. <i>Journal of Urban Affairs</i> , 38(3), 429-449. doi:10.1111/juaf.12229						X	X					
Schriesheim, C. A., & Bird, B. J. (2010). Conceptual contributions of the Ohio State leadership studies. In J. T. McMahon (Ed.), <i>Leadership classics</i> (pp. 171-175). Long Grove, IL: Waveland Press.												X
Schullery, N. M. (2013). Workplace engagement and generational differences in values. <i>Business Communication Quarterly</i> , 76(2), 252-265. doi:10.1177/1080569913476543								X				
Self, D. R., & Schraeder, M. (2009). Enhancing the success of organizational change: Matching readiness strategies with sources of resistance. <i>Leadership &amp; Organization Development Journal</i> , 30(2), 167-182. doi:10.1108/01437730910935765										X	X	
Senge, P. M. (1990). <i>The fifth discipline: The art and practice of the learning organization</i> . New York, NY: Currency-Doubleday.										X	X	
Senge, P. M., Kleiner, A., Roberts, C., Ross, R., Roth, G., & Smith, B. (1999). <i>The dance of change: The challenges of sustaining momentum in learning organizations</i> . New York, NY: Currency-Doubleday.										X	X	
Shanker, M., & Sayeed, O. B. (2012). Role of transformational leaders as change agents: Leveraging effects on organizational climate. <i>Indian Journal of Industrial Relations</i> , 47(3), 470-484.										X		X
Shanley, C. (2007). Managing change through management development: An industry case study. <i>Journal of Management Development</i> , 26(10), 962-979. doi:10.1108/02621710710833414										X		
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Shelton, E. J. (2012). <i>Transformational leadership: Trust, motivation and engagement</i> . San Bernardino, CA: Trafford										X	X	X

Shin, J., Seo, M.-G., Shapiro, D. L., & Taylor, M. S. (2015). Maintaining employees' commitment to organizational change: The role of leaders' informational justice and transformational leadership. <i>Journal of Applied Behavioral Science, 51</i> (4), 501-528. doi:10.1177/0021886315603123										X	X
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Sikdar, A., & Payyazhi, J. (2014). A process model of managing organizational change during business process redesign. <i>Business Process Management Journal, 20</i> (6), 971-998. doi:10.1108/BPMJ-02-2013-0020										X	
Smith, J. P., II. (2010). <i>The effects of self-efficacy and spirituality on the job satisfaction and motivation to lead among redeploying soldiers as moderated by transformational leadership</i> (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3447893)											X
Srinivasan, V. (2012). Round Table: Multi generations in the workforce: Building collaboration. <i>IIMB Management Review, 24</i> (1), 48-66. doi:10.1016/j.iimb.2012.01.004			X							X	
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Stewart, J. (2006). Transformational leadership: An evolving concept examined through the works of Burns, Bass, Avolio, and Leithwood. <i>Canadian Journal of Educational Administration and Policy, 54</i> , 1-29.											X
Stirling, J. B., II. (1997). <i>Situational leadership theory: A test of leadership style and follower readiness matches in condominium and homeowner associations</i> (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 9823313)											X
Stogdill, R. M. (2010). Personal factors associated with leadership. In J. T. McMahon (Ed.), <i>Leadership classics</i> (pp. 68-72). Long Grove, IL: Waveland Press.											X
Strauss, W., & Howe, N. (1991). <i>Generations: The history of America's future, 1584 to 2069</i> . New York, NY: Morrow.			X							X	

Strebel, P. (1998). Why do employees resist change? In <i>Harvard Business Review: On change</i> (pp. 139-157). Boston, MA: Harvard Business School Press.									X	X	
Strege, J. (2014). California: How to reconcile a drought with 124 desert golf courses. <i>Golf Digest</i> . Retrieved from <a href="https://www.golfdigest.com/story/california-how-to-reconcile-a">https://www.golfdigest.com/story/california-how-to-reconcile-a</a>	X			X	X						
Strutz, T. (2016). The REAL secret to club success. <i>The McMahan Report</i> , 11(3), 11.					X		X				
Sull, D. N. (2002). Why good companies go bad. In <i>Harvard Business Review: On culture and change</i> (pp. 83-106). Boston, MA: Harvard Business School Press.									X	X	
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Tannenbaum, R., & Schmidt, W. H. (2010). How to choose a leadership pattern. In J. T. McMahan (Ed.), <i>Leadership classics</i> (pp. 276-286). Long Grove, IL: Waveland Press.											X
Tao, J. L., & McCabe, B. C. (2012). Where a hollow state casts no shadow: Homeowner associations in local governments. <i>The American Review of Public Administration</i> , 42(6), 678-694. doi:10.1177/0275074012452337						X	X	X			
Taylor, A. (2015). <i>Mentorship for first year principals leading transformational change</i> (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3689611)									X		X
Taylor, P., & Gao, G. (2014, June 5). Generation X: America's neglected "middle child." <i>Fact Tank</i> . Retrieved from <a href="http://www.pewresearch.org/fact-tank/2014/06/05/generation-x-americas-neglected-middle-child/">http://www.pewresearch.org/fact-tank/2014/06/05/generation-x-americas-neglected-middle-child/</a>		X				X		X			
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<i>The transformational leadership report</i> . (2007). Retrieved from <a href="http://www.transformationalleadership.net/products/TransformationalLeadershipReport">http://www.transformationalleadership.net/products/TransformationalLeadershipReport</a>											X



Twenge, J. M. (2009). Generational changes and their impact in the classroom: Teaching generation me. <i>Medical Education</i> , 43(5), 398-405. doi:10.1111/j.1365-2923.2009.03310.x			X					X			
Twenge, J. M. (2010). A review of the empirical evidence on generational differences in work attitudes. <i>Journal of Business and Psychology</i> , 25(2), 201-210. doi:10.1007/s10869-010-9165-6			X					X			
Twenge, J. M. (2014). <i>Generation me: Why today's young Americans are more confident, assertive, entitled—and more miserable than ever before</i> New York, NY: ATRIA.			X					X			
Umble, M., & Umble, E. (2014). Overcoming resistance to change. <i>Industrial Management</i> , 56(1), 16-21.									X	X	
Underdue Murph, Y. (2005). <i>A meta-analytic review of the relationship between transformational leadership during complex organizational change and worker and organizational outcomes in public and private sector organizations</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3218813)									X	X	X
Underwood, C. (2007). <i>The generational imperative: Understanding generational differences in the workplace, marketplace, and living room</i> . North Charleston, SC: BookSurge.			X			X		X			
Vain, F. (2016). Holistic view to gated community revitalization. <i>The McMahan Report</i> , 11(4), 10.						X					
Vain, F. (2017a). A game with a great past and a bright future: Private club golf trends. <i>Club Trends: Strategies for successful clubs</i> , 4(2), 12-15.					X	X		X			
Vain, F. (2017b). In good company: The renaissance at the Country Club of Detroit. <i>The McMahan Report</i> , 12(1), 4.						X		X			
Vesselinov, E. (2008). Members only: Gated communities and residential segregation in the metropolitan United States. <i>Sociological Forum</i> , 23(3), 536-555. doi:10.1111/j.1573-7861.2008.00075.x						X	X	X			
vom Brocke, J., Schmiedel, T., Recker, J., Trkman, P., & Mertens, W. (2014). Ten principles of good business process management. <i>Business Process Management Journal</i> , 20(4), 530-548. doi:10.1108/BPMJ-06-2013-0074								X			
Vora, M. K. (2013). Business excellence through sustainable change management. <i>The TQM Journal</i> , 25(6), 625-640. doi:10.1108/TQM-07-2013-0080									X		
Vroom, V. H., & Jago, A. G. (2010). Leadership and decision-making. In J. T. McMahan (Ed.), <i>Leadership classics</i> (pp. 321-336). Long Grove, IL: Waveland Press.											X

Waddell, D., & Sohal, A. S. (1998). Resistance: A constructive tool for change management. <i>Management Decision</i> , 36(8), 543-548. doi:10.1108/00251749810232628										X	X	
Walks, A. (2014). Gated communities, neighbourhood selection and segregation: The residential preferences and demographics of gated community residents in Canada. <i>TPR: Town Planning Review</i> , 85(1), 39-66. doi:10.3828/tpr.2014.5						X	X	X				
Walks, R. A. (2010). Electoral behaviour behind the gates: Partisanship and political participation among Canadian gated community residents. <i>Area</i> (1), 7-24. doi:10.1111/j.1475-4762.2009.00890.x						X	X	X				
Wang, F. (2008). <i>The social functions of private neighborhood associations: The case of homeowner associations in urban China</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3331181)							X					
Webster, C., Glasze, G., & Frantz, K. (2002). The global spread of gated communities. <i>Environment &amp; Planning B: Planning &amp; Design</i> , 29(3), 315-320. doi:10.1068/b12926						X	X	X				
Weiser, J., & Neath, R. (2016). Private ordering, social cohesion and value: Residential community association covenant enforcement. <i>International Real Estate Review</i> , 19(1), 1-26.							X	X				
Wersan, L. S. (2015). <i>Reinvestigating the Mission Creek Fault: Holocene slip rates in the northern Coachella Valley and implications for Southern California earthquake hazard assessment</i> (Master's Thesis). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 1599159)		X										
White, R. K., & Lippitt, R. (2010). Autocratic vs. democratic leadership. In J. T. McMahon (Ed.), <i>Leadership classics</i> (pp. 166-170). Long Grove, IL: Waveland Press.												X
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Williams, K. (2014). <i>A comparison of pastor leadership behavior in churches of 1,000 or more members to transformational leadership behavior as Identified in the transformational leadership skills inventory</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3668810)										X	X	X

Wisely, B. A. (2012). <i>Geophysical and hydrogeologic investigations of two primary alluvial aquifers embedded in the southern San Andreas fault system: San Bernardino basin and upper Coachella Valley</i> (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses database. (UMI No. 3523408)			X									
Xiang, J., Archer, N., & Detlor, B. (2014). Business process redesign project success: The role of socio-technical theory. <i>Business Process Management Journal</i> , 20(5), 773-792. doi:10.1108/BPMJ-02-2013-0020										X		
Xu, M., & Yang, Z. (2008). Theoretical debate on gated communities: Genesis, controversies, and the way forward. <i>Urban Design International</i> , 13(4), 213-226. doi:10.1057/udi.2008.29						X	X	X				
Yahaya, R., & Ebrahim, F. (2016). Leadership styles and organizational commitment: Literature review. <i>Journal of Management Development</i> , 35(2), 190-216. doi:10.1108/JMD-01-2015-0004										X	X	
Yukl, G. (1989). Managerial leadership: A review of theory and research. <i>Journal of Management</i> , 15(2), 251-289.												X
Yukl, G. (2006). <i>Leadership in organizations</i> (6th ed.). Upper Saddle River, NJ: Pearson-Prentice Hall.												X
Zander, A. (1950). Resistance to change—its analysis and prevention. <i>Advanced Management Journal</i> , 15(1), 9-11.										X	X	
Zemke, R., Raines, C., & Filipczak, B. (2013). <i>Generations at work: Managing the clash of veterans, boomers, Xers, and nexters in your workplace</i> (2nd ed.). New York, NY: AMACOM.			X			X		X				

## APPENDIX E

### Study Participant Letter of Invitation

January 15, 2018

Mr. Smith,

My name is Shaun Hillis and I am a doctoral candidate at Brandman University conducting dissertation research concerning the use of transformational leadership traits by Coachella Valley gated golfing community general managers to overcome community resistance to change. A secondary area of my research focuses on your perceptions of the varying generational cohorts' (Greatest Generation, Baby Boomers, Generation X, Millennials) acceptance of change within your community.

As I am sure you are aware, there have been a number of golf course closures within the Coachella Valley over the past few years as a result of the latest economic recession, both here in the United States and Canada, and the aging of community members. This economic slowdown and shifting demographic trends have resulted in an environment in which many Coachella Valley communities have had to make changes to their business models, amenity offerings, etc. My research is specifically focused on community change initiatives that have been instituted by you and the specific actions you took to overcome community member's resistance to these change initiatives.

I would like to request your participation in an approximately 45 to 60-minute face-to-face interview at a time and place convenient to you. All information shared during the interview will remain confidential and your name and community will not be attached to any notes or the interview transcripts. All information will be stored in digitally locked files only accessible to me. Furthermore, you will be free to stop the interview and withdraw from the study at any time. My research findings will be made available for your use, if so desired, upon their approval and subsequent publication.

Finally, in the sake of full disclosure, I would like to inform you that I am a member of XXX Country Club. At no time, will any information concerning your participation in this study or any details of your community be shared with XXX Management, HOA, or membership.

If you are willing to participate, please contact me at your convenience at any of the following:

Email: shillis@mail.brandman.edu  
Telephone: (Home) (760) 555-5555  
Telephone: (Cell) (619) 555-5555

I thank you for your time and consideration of this request. I am also happy to answer any questions or address any concerns you may have in advance of your participation.

Very respectfully,

*Shaun A. Hillis*

Shaun A. Hillis  
CDR, USN (RET)

## APPENDIX F

### **Qualitative Research Consent Form**

**INFORMATION ABOUT:** Overcoming Community Resistance to Change via the Use of Transformational Leadership by general managers of Southern California's Coachella Valley gated golfing communities.

**RESPONSIBLE RESEARCHER:** Shaun A. Hillis, MS, CDR, USN (RET)

**PURPOSE OF STUDY:** I am being asked to participate in a research study conducted by Shaun A. Hillis, MS, CDR, USN (RET), a doctoral student from the Brandman University School of Education. The purpose of this qualitative case study is to identify and describe the use of transformational leadership traits to overcome resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley. A secondary purpose is to explore and describe generational cohorts' resistance to change as perceived by general managers of gated golfing communities in Southern California's Coachella Valley.

This study will fill in gaps in the academic and business research literature regarding the rapidly shifting business environment forcing organizations to embrace and adopt organizational change to remain relevant. At the same time, organizational members are inherently resisting any change to the status quo. The literature shows that transformational leadership is a means to institute and successfully carry out organizational change while simultaneously overcoming organizational stakeholder's resistance to change. The current research body of knowledge incorporating organizational change, organizational resistance to change, generational cohorts, and transformational leadership is insufficient in its depth and breadth. This study will

address and integrate the interaction of these four disparate elements in the given context of Southern California's Coachella Valley gated golfing communities. Finally, this study will contribute to the academic literature gap by addressing these four elements within a single communal study setting.

By participating in this study, I agree to participate in an individual face-to-face interview. The interview(s) will last approximately 45 – 60 minutes and will be conducted by the principal researcher Shaun A. Hillis in person at a time and place of convenience to me. Completion of the individual interview will take place January through February 2018.

**I understand that:**

- a) There are minimal risks associated with participating in this research. I understand that the researcher will protect my confidentiality by keeping all identifying codes and research materials in a locked safe that is available only to the researcher.
- b) I understand that the interview will be audio recorded. The recordings will be available only to the researcher and the professional transcriptionist. The audio recordings will be used to capture the interview dialogue and to ensure the accuracy of the information collected during the interview. All information collected will be identifier-redacted, and my personal and community confidentiality will be maintained. Upon completion of the study all recordings, transcripts and notes taken by the researcher and transcripts from the interview will be destroyed.
- c) The possible benefit of this study to me is that my input may help add to the research regarding the use of transformational leadership to overcome community resistance to change during gated golfing community change initiatives and the recruitment and

integration of younger generational cohorts into these same communities. The findings will be available to me at the conclusion of the study and will provide new insights about the use of transformational leadership within my community. I understand that I will not be compensated for my participation.

d) If I have any questions or concerns about the research, I am free to contact Shaun A. Hillis at [shillis@mail.brandman.edu](mailto:shillis@mail.brandman.edu) or by phone at (619) 555-5555; or Dr. Douglas DeVore (Dissertation Chair) at [ddevore@brandman.edu](mailto:ddevore@brandman.edu).

e) My participation in this research study is voluntary. I may decide to not participate in the study and I can withdraw at any time. I can also decide not to answer particular questions during the interview if I so choose. I understand that I may refuse to participate or may withdraw from this study at any time without any negative consequences. Also, the researcher may stop the study at any time.

f) No information that identifies me or my community will be released without my separate consent and that all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be so informed, and my consent re-obtained. I understand that if I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Vice Chancellor of Academic Affairs, Brandman University, at 16355 Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

I acknowledge that I have received a copy of this form and the “Research Participant’s Bill of Rights.” I have read the above and understand it and hereby consent to the procedure(s) set forth.



\_\_\_\_\_  
Signature of Participant or Responsible Party

\_\_\_\_\_  
Signature of Principal Researcher

Date: \_\_\_\_\_

## APPENDIX G

### Study Participant Bill of Rights



#### BRANDMAN UNIVERSITY INSTITUTIONAL REVIEW BOARD

##### Research Participant's Bill of Rights

Any person who is requested to consent to participate as a subject in an experiment, or who is requested to consent on behalf of another, has the following rights:

1. To be told what the study is attempting to discover.
2. To be told what will happen in the study and whether any of the procedures, drugs or devices are different from what would be used in standard practice.
3. To be told about the risks, side effects or discomforts of the things that may happen to him/her.
4. To be told if he/she can expect any benefit from participating and, if so, what the benefits might be.
5. To be told what other choices he/she has and how they may be better or worse than being in the study.
6. To be allowed to ask any questions concerning the study both before agreeing to be involved and during the course of the study.
7. To be told what sort of medical treatment is available if any complications arise.
8. To refuse to participate at all before or after the study is started without any adverse effects.
9. To receive a copy of the signed and dated consent form.
10. To be free of pressures when considering whether he/she wishes to agree to be in the study.

If at any time you have questions regarding a research study, you should ask the researchers to answer them. You also may contact the Brandman University Institutional Review Board, which is concerned with the protection of volunteers in research projects. The Brandman University Institutional Review Board may be contacted either by telephoning the Office of Academic Affairs at (949) 341-9937 or by writing to the Vice Chancellor of Academic Affairs, Brandman University, 16355 Laguna Canyon Road, Irvine, CA, 92618.

## APPENDIX H

### Research Study Interviewee Handouts

#### Transformational Leadership Traits

Transformational leadership is a style of leadership that instills a shared vision within stakeholders; fosters a continuous learning environment (group, team, individual); focuses on overcoming organizational and individual resistance to change; all while achieving effective organizational change strategies (Burns, 1978; Kouzes & Posner, 2007; Northouse, 2007; Yukl, 1989). Bass and Riggio (2006) identify four transformational leadership traits: individualized consideration, idealized influence, inspirational motivation, and intellectual stimulation:

***Individualized Consideration:*** Transformational leaders focus on the growth, advancement, and achievements of each individual follower. The transformational leader is a mentor and coach to their followers (Bass & Riggio, 2006).

***Idealized Influence:*** Transformational leaders are admired, venerated, and respected by their followers who wish to emulate them. Transformational leaders take calculated risks, always do the right thing, and have strong moral and ethical codes (Bass & Riggio, 2006).

***Inspirational Motivation:*** Transformational leaders are motivators and serve as an inspirational force for their followers. Transformational leaders instill high-levels of team-spirit in their followers. Transformational leaders instill a commitment to a shared organizational vision (Bass & Riggio, 2006).

***Intellectual Stimulation:*** Transformational leaders encourage their followers to think outside of the box. New ideas and approaches to solving organizational challenges are encouraged by the transformational leader. Transformational leaders stimulate creativity, innovation, and a questioning of long-standing assumptions (Bass & Riggio, 2006).

## Generational Cohorts

***Greatest Generation:*** Generational cohort born between the years 1901 and 1945 (Bump, 2014). Also referred to as the G.I. Generation, Traditionals, Traditionalists, Veteran, Veterans, Matures, and the Silent Generation.

***Baby Boom Generation:*** “Baby Boomers.” Generational cohort born between the years 1946 and 1964 (Bump, 2014).

***Generation X:*** “Gen-X.” Generational cohort born between the years 1965 and 1984 (Bump, 2014).

***Millennial Generation:*** Generational cohort born between the years 1985 and 2004 (Bump, 2014).

## APPENDIX I

### Research Study Interview Protocol

*[Interviewer:] I thank you for taking the time out of your busy schedule to sit down and share your story with me. To review, the purpose of this qualitative case study is to identify and describe your use of transformational leadership to overcome staff and community member's resistance to change. There are three major goals associated with this study:*

- 1. To fully ascertain your perceptions, positive or negative, with regards to the efficacy and role of transformational leadership in overcoming resistance to change.*
- 2. To determine the impacts, positive or negative, of a homeowner's association on overcoming resistance to change.*
- 3. To determine your perceptions of generational cohorts' resistance to change.*

*The questions are written, and will be presented, in a manner to prompt an in-depth conversation. There is no right or wrong answer. This is merely an opportunity for you to share your experiences and stories of how you have approached community change initiatives. Your responses will remain completely anonymous, so I encourage you to be as honest and open as you feel comfortable being to ensure the veracity of these research efforts.*

*I would like to take a few moments to review the steps that have gotten us to this point. First, you were invited to participate via letter and confirmation was obtained by telephone or email. You have signed an informed consent form outlining the interview process and describing the complete personal and community anonymity granted for the purposes of this study. Finally, this interview will be recorded via two duplicate digital recorders, one as a primary and the second as a backup, and will be transcribed via professional transcription services. You will be provided with a copy of the complete transcripts to check for accuracy in content and meaning prior to me analyzing the data. Do you have any objections to my recording this interview? Do you have any questions for me before we begin?*

## Background Content Questions

1. Please share a little about yourself both personally and professionally.
  - 1a. How long have you served as the General Manager of this community/club?
  - 1b. Do you hold any professional certifications from the Club Managers Association of America (CMAA) or National Clubs Association (NCA)?
2. How would you describe your personal leadership style?
  - 2a. Has this leadership style evolved over time?
  - 2b. If so, why do you think it has evolved?

## Transformational Leadership Content Questions

*[\*\*\*\*Provide printed card with the four transformational leadership traits to the General Manager prior to reading the following\*\*\*\*]*

*[Interviewer:] Researchers have identified transformational leadership as an effective leadership style for overcoming organizational resistance to change. Four key traits of transformational leadership have been identified by Bass & Riggio (2006):*

- **Idealized influence.** Transformational leaders are admired, venerated, and respected by their followers who wish to emulate them. Transformational leaders take calculated risks, always do the right thing, and have strong moral and ethical codes (Bass & Riggio, 2006).
- **Inspirational motivation.** Transformational leaders are motivators and serve as an inspirational force for their followers. Transformational leaders instill high-levels of team-spirit in their followers. Transformational leaders instill a commitment to a shared organizational vision (Bass & Riggio, 2006).
- **Intellectual Stimulation.** Transformational leaders encourage their followers to think outside of the box. New ideas and approaches to solving organizational challenges are encouraged by the transformational leader. Transformational

*leaders stimulate creativity, innovation, and a questioning of long-standing assumptions (Bass & Riggio, 2006).*

- **Individualized consideration.** *Transformational leaders focus on the growth, advancement, and achievements of each individual follower. The transformational leader is a mentor and coach to their followers (Bass & Riggio, 2006).*

*I would like you to think of these four traits as you answer the following questions.*

3. Given the four identified transformational leadership traits, how do you perceive the efficacy of transformational leadership in overcoming community resistance to change?

3a. Why?

4. Which of the four transformational leadership traits do you perceive as being more important than the others when trying to overcome/address community resistance to change?

4a. Why?

5. Which of the four transformational leadership traits do you perceive as being the least important when trying to overcome/address community resistance to change?

5a. Why?

### **Resistance to Change Content Questions**

6. What does the phrase resistance to change mean to you?

7. When contemplating a community change initiative do you take into account community resistance to change?

7a. If so, what specific actions do you take to overcome/address community resistance to change?

8. Could you describe a recent successful community change initiative?
- 8a. In your opinion, why was it successful?
  - 8b. Were any transformational leadership traits instrumental to this success?
9. Could you describe a recent unsuccessful change initiative?
- 9a. In your opinion, why was it unsuccessful?
  - 9b. Would any of the four transformational leadership traits made this a successful community change initiative?

### **Generational Cohorts Content Questions**

*[\*\*\*\*Provide printed card with the four generational cohorts to the General Manager prior to reading the following\*\*\*\*]*

*[Interviewer] Three generational cohorts comprise the majority of community members in Coachella Valley gated golf communities. These three generational cohorts are:*

- ***Greatest Generation – (1901-1945) – Youngest member in 2018: 73 years old***
- ***Baby Boomers – (1946-1964) – Youngest member in 2018: 54 years old***
- ***Generation X – (1965-1984) – Youngest member in 2018: 34 years old***

*A fourth generational cohort, the largest generational cohort currently alive, will be entering Coachella Valley gated golf communities in the very near future.*

- ***Millennials – (1985-2004) – Youngest member in 2018: 14 years old***

10. Do you perceive one generational cohort being more receptive to community change initiatives than another?

10a. Why?



11. Do you perceive one generational cohort more resistant to community change initiatives than another?

11a. Why?

12. The McMahon Group and the Club Managers Association of America (CMAA) have identified changing demographics as an area of concern for private golf communities?

12a. Do you agree/disagree?

12b. Why do you agree/disagree?

12c. How are you, the HOA Board of Directors, and the community addressing these identified concerns?

### **Homeowners' Association Content Questions**

13. How do you perceive the community homeowner's association, and associated Board of Directors, as a benefit when implementing community change initiatives?

13a. Why?

14. How do you perceive the community homeowner's association, and associated Board of Directors, as a hindrance when implementing community change initiatives?

14a. Why?

15. How does the HOA Board of Directors participate in community change initiatives?

### **Community Demographic Question**

16. How many homes are in the community?

< 500

500-999

1000-1500

>1500

17. How many homeowner's associations do you interact with in your community?

APPENDIX J

**Research Questions/Survey Questions Synthesis Matrix**

Survey	RQ1 <sup>a</sup>	RQ2 <sup>b</sup>	RQ3 <sup>c</sup>	Background/ Demographic
Q1.				X
Q1a.				X
Q1b.				X
Q2.				X
Q2a.				X
Q2b.				X
Q3.	X			
Q3a.	X			
Q4.	X			
Q4a.	X			
Q5.	X			
Q5a.	X			
Q6.	X			
Q7.	X	X		
Q7a.	X	X		
Q8.	X	X		
Q8a.	X	X		
Q8b.	X	X		
Q9.	X	X		
Q9a.	X	X		
Q9b.	X	X		
Q10.			X	
Q10a.			X	
Q11.			X	
Q11a.			X	
Q12.			X	
Q12a.			X	
Q12b.			X	
Q12c.		X	X	
Q13.		X		
Q13a		X		
Q14.		X		
Q14a.		X		
Q15.		X		
Q16.				X
Q17.				X
Q18.	***	***	***	***
Q19.	***	***	***	***

*Note.* For Interview Questions 18 and 19, participant response applicability to research questions was dependent on actual responses to interview protocol questions.

<sup>a</sup>How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the use of transformational leadership traits to overcome resistance to change? <sup>b</sup>How do general managers of gated golfing communities in Southern California's Coachella Valley perceive the importance of working with homeowners' association boards of directors in overcoming resistance to change? <sup>c</sup>How do general managers of gated golfing communities in Southern California's Coachella Valley characterized by a homeowner's association governance model perceive resistance to change by different generational cohorts?

## APPENDIX K

### Brandman University Institutional Review Board Permission to Conduct Research

From: **Institutional Review Board** my@brandman.edu  
Subject: BUIRB Application Approved As Submitted: Shaun A. Hillis  
Date: January 12, 2018 at 15:05  
To: shillis@mail.brandman.edu  
Cc: ddevore@brandman.edu, buirb@brandman.edu



Dear Shaun A. Hillis,

Congratulations, your IRB application to conduct research has been approved by the Brandman University Institutional Review Board. This approval grants permission for you to proceed with data collection for your research. Please keep this email for your records, as it will need to be included in your research appendix.

If any issues should arise that are pertinent to your IRB approval, please contact the IRB immediately at [BUIRB@brandman.edu](mailto:BUIRB@brandman.edu). If you need to modify your BUIRB application for any reason, please fill out the "Application Modification Form" before proceeding with your research. The Modification form can be found at the following link: <https://irb.brandman.edu/Applications/Modification.pdf>.

Best wishes for a successful completion of your study.

Thank you,  
**Doug DeVore, Ed.D.**  
Professor  
Organizational Leadership  
BUIRB Chair  
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APPENDIX L

Semistructured Qualitative Interview Word Clouds



Figure L1. General Manager 1 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



Figure L2. General Manager 2 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



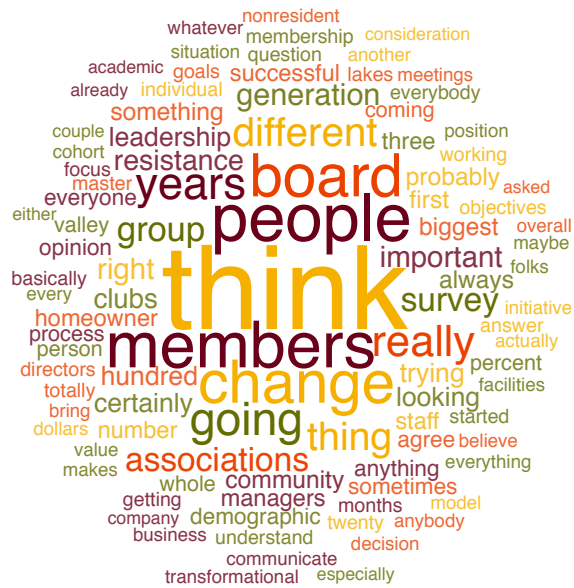


Figure L5. General Manager 5 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



Figure L6. General Manager 6 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



Figure L7. General Manager 7 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



Figure L8. General Manager 8 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.





Figure L9. General Manager 9 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



Figure L10. General Manager 10 qualitative interview top 100 words by frequency. Generated by NVivo (Version 11) QDAS.



