



Judi Neal

People and Organizations that Take Risks, Build Bridges, and Break New Ground

EDGEWALKERS 

## EDGEWALKERS SURVEY – RESEARCH SUMMARY REPORT

### Purpose of the Study

In 2006, the book *Edgewalkers: People and Organizations that Take Risks, Build Bridges, and Break New Ground* was published by Praeger (Westport, CT). The book describes a new kind of leader that Judith Neal calls “Edgewalkers” – people who walk between worlds and who are always on the leading edge. The book describes five qualities of Edgewalkers (Self-Awareness, Passion, Integrity, Vision, and Playful) and five Edgewalking Skills (Knowing the Future, Risk-taking, Manifesting, Focusing, and Appreciating). In 2007, Judith created a 100 item “Edgewalker Questionnaire – Individual” that measures these 5 qualities and 5 skills for individuals. It was used with participants in the Master of Arts in Organizational Leadership Program at the Graduate Institute as well as at Edgewalker workshops in London and Mallorca.

In 2008, Judith created a 48 item “Organizational Orientation Scale” that attempted to measure orientation to time and orientation to change – the two factors in her Edgewalker Orientation Model in the book. She also created a 20 item scale that measures the five Organizational Orientations (Edgewalkers, Flamekeepers, Placeholders, Hearttenders, and Doomsayers).

The purpose of this study is to validate these questionnaires and to reduce the number of items while still retaining validity and reliability. When fully tested, these questionnaires will be used in organizational consulting, for executive coaching, and for research.

### How the Questions Were Generated

The questions were generated from the descriptive material of the five qualities, the five skills, and the five orientations in the book *Edgewalkers*. There is a 20-item checklist in the book and this was used as a starting point for questions, sorting each of those items into the appropriate factor. Those 20 items were developed as a result of extensive interviews with leaders who are both innovative and humanistic. The rest of the items were developed by copying descriptive statements from the text in the book, by developing similar items with slightly different wording, and by developing negatively worded items. 10 items were developed for each of the five skills and each of the five qualities. The response scale for each item was a 7-point scale ranging from Strongly Agree (7) to Strongly Disagree (1). 24 of the items were written to describe the opposite of the intended construct. These were reverse-scored in the analysis process.

Items were developed for the Organizational Orientation Scale by creating two major factors from the Edgewalker Orientation Model in the book: (1) Orientation to Time (Past, Present, and Future), and (2) Orientation to Change (Closed to Change, Neutral, Open to Change). For each of these major factors and subsets, 4 items were created to measure self-perception, and 4 items were created to measure perception

of the organization. This totaled 48 items. Following that, 4 items were created for each of the five orientations (Edgewalker, Flamekeeper, Placeholder, Hearttender, and Doomsayer) based on the definitions and descriptions in the book. This totaled an additional 20 items. We wanted to test whether or not the actual definitions of the orientations fit into the model that was based on orientation to time and orientation to change.

### **Populations, Demographics and Return Rates**

We did not ask participants to provide any demographic or organigraphic data, since this first round of testing focused on the measurement properties of the items and scales and we will not be doing any kind of comparison studies until the questionnaire design is completed.

#### *Individual Questionnaire*

On November 16, 2008, a request was sent out to 990 people inviting them to help us test the “Edgewalker Questionnaire – Individual” questionnaire. People were given a link to a SurveyMonkey.com website. They were given until November 26, 2008 to complete the questionnaire. The population receiving this request included people on 3 very different newsletter lists kept by Judith Neal:

- Music Newsletter: 240 subscribers
- Spirit at Work Researchers: 630 subscribers
- Edgewalkers Workshop Participants: 484 subscribers

A total of 990 invitations were sent to these combined lists. The three lists add up to more than 990 subscribers, but there is quite a bit of overlap among the groups. 34.6% of the email invitations were opened (319 people). 69 people actually filled out the questionnaire. That’s a 7% return rate for all of the invitations sent and a 22% return rate for those people who actually read the invitation.

Of the 69 study participants, 51 (74%) requested a copy of the summary report and provided us their emails. 13 participants (26% of those who provided emails) had international email addresses, including one each from Pakistan, Switzerland, Spain, The Netherlands, United Arab Emirates, Israel, Canada, and Australia. Two study participants provided emails from Germany and three from the United Kingdom.

#### *Organizational Orientation Scale*

On November 18, 2008, a request was sent out to 4490 people who are in the Neal & Associates database (3029 subscribers) and the International Center for Spirit at Work database (2801 subscribers). Again, there is considerable overlap. 1061 (28%) of the email invitations were opened. 97 people completed the questionnaire. That represents a 2% response rate for all invitations sent, and a 9% response rate for those who opened the invitation.

Of the 97 study participants, 64 (66%) requested a copy of the summary report and provided their e-mails. 9 participants (14%) had international e-mail addresses, including four from the United Kingdom, two from Switzerland, and one each from The Netherlands, Canada, and Australia.

## Analyses and Results

The analyses described below were a collaborative effort between Judith Neal and Linda Hoopes, an organizational psychologist who has helped several other organizations in similar efforts to develop and refine assessment tools and reports.

### *Individual Scale*

The initial scale had 100 items, 10 for each of the subscales. Our goal was to produce a set of shorter scales that were true to the original constructs, were composed of items that would be meaningful to the broadest range of participants, and provided adequate reliability. We did not seek to develop scales that were orthogonal (uncorrelated with one another).

Through an iterative process involving review of qualitative comments (to identify items that were seen as confusing by the respondents), calculation of descriptive statistics (to identify items with low variability), factor analysis (to identify items that grouped together statistically and compare them to the conceptual framework), and internal consistency reliability analyses (to ensure that each scale represented a grouping of items that was statistically related to one another), we reduced the set of items from 100 to 50, with five items representing each of the 10 subscales.

One concern in this analysis was that the number of completed responses was low relative to the number of items. For this reason, we were pleased to find that the various criteria for keeping vs. dropping items led to consistent conclusions. In several cases we moved items from one scale to another due to better conceptual and statistical fit with the emerging scale structure. We did find that most of the reverse-scored items fell out in the analysis. At this point the instrument has four reverse-scored items. We should also note that in the process of these analyses we had a whole lot of fun playing with ideas, printouts, and highlighters.

Statistical properties of the scales are as follows. The possible score range on each item was 5-35.

<b>Scale</b>	<b>Mean</b>	<b>S.D.</b>	<b>Reliability (Alpha)</b>
<b>Self-Awareness</b>	29.58	5.23	.80
<b>Passion</b>	29.13	4.54	.71
<b>Integrity</b>	30.39	3.15	.72
<b>Vision</b>	28.32	4.53	.76
<b>Playful</b>	29.71	4.16	.81
<b>Knowing the Future</b>	29.75	4.69	.79
<b>Risk-Taking</b>	27.67	4.75	.80
<b>Manifesting</b>	25.11	5.38	.79
<b>Focusing</b>	25.87	5.05	.77
<b>Appreciating</b>	28.93	3.99	.66

Our target for internal consistency reliability was .70 for each scale. By this criterion all scales achieved acceptable reliabilities except the Appreciating scale, which is slightly below the target. At this time we

have chosen to use the scale as tested. Over time we will look for opportunities to increase its reliability by replacing one or more items.

Once we had selected the final set of items, we computed scale scores for each respondent and calculated the intercorrelations between the 10 subscales. They ranged from  $-.08$  to  $.69$ , with the majority being positive and significant. This suggests that the dimensions are not conceptually independent. To pursue this issue further, we performed a second-order factor analysis, using the scores from the 10 subscales as input. We found three factors, which we have tentatively named Seeing, Being, and Doing. We intend to explore these further in additional analyses.

### *Organizational Orientation Scale*

The analyses for the Organizational Orientation Scale were somewhat more challenging. As noted above, the conceptual framework suggests that time orientation and change orientation are two separate dimensions that, in turn, are predictive of the five Edgewalker organizational orientations. Our first step was to analyze the time and change items to confirm that they formed reliable scales describing separate dimensions. After trying several approaches, including analyzing the self-perception and organizational perception items separately and together, factor-analyzing the items to see how the items grouped statistically, dropping the neutral items and repeating the process, and putting the entire set of items (time, change, and the five organizational orientations) into the mix, we concluded that the structure of the items did not neatly map to the dimensions specified in the model. In particular, we found that orientation to the future and openness to change are highly correlated, as are orientation to the past and being closed to change, and that items describing a focus on the present formed a separate grouping.

We then turned our attention to the five orientations. Initial analyses suggested that these items held together more as predicted, particularly for the Edgewalker, Flamekeeper, and Placeholder orientations, although the internal consistency reliability coefficients for these were still below acceptable levels. The Hearttender and Doomsayer items did not hang together as well. As we reviewed the items, we found that some items asked the respondent to describe themselves, and some to describe their perceptions of what is going on in the organization.

We wrapped up our analyses with the conclusion that we need to revisit some fundamental questions about the model, construct a new set of items, and retest this tool. Some of the questions include:

- 1) Are the Edgewalker orientations characteristics of individuals, organizations, or both?
- 2) If both, what's the relationship? For instance, if a lot of individuals in an organization have strong Flamekeeper tendencies, does that create an organizational Flamekeeper orientation?
- 3) Can we distinguish between orientation to time and orientation to change? If not, what are the implications for the five types?
- 4) Is there a way to articulate positive value that is brought by types that can be seen as "negative" (Doomsayer, Placeholder)—for instance, can we talk about a Protector role?

## **Next Steps**

### *Individual Questionnaire*

Our next steps on the Individual Questionnaire are 1) to create a standard report format that could be used to provide feedback to an individual, and a report that represents the aggregation of a group of individuals, and 2) to begin to collect some data that will form the basis of a normative database. Because the initial test sample was drawn from Judith's mailing lists, they likely present a biased group in terms of the various Edgewalker qualities and skills. We will be reaching out to Judith's contacts to identify individuals who might be able to provide access to more varied populations for data collection.

### *Organizational Orientation Scale*

We will spend time brainstorming on the questions that were raised in our initial work and create a revised set of items to test, and perhaps a revised conceptual model. Once we have stabilized the scale and the model, we will be seeking a sample of organizations that will each be willing to let us gather data from 30 or more individuals, so that we can look at the relationship between individual and organizational orientations.

Thank you for your interest and participation in this development process. We are very excited about the progress we've made, and sobered by the amount of work yet to be done to produce high-quality tools that will be useful to individuals and organizations seeking to play on the leading edge.

Sincerely,

Judith Neal, Ph.D.

Linda Hoopes, Ph.D.