Chapter 26
Edgewalker Assessment for Spiritual Leadership and Resilience

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Abstract In the past few years, several new theories of leadership have been proposed that help us to understand more about leaders who are innovative, creative, values-centered, and resilient in the face of change. One of these theories is about leaders who are Edgewalkers, who walk between worlds and build bridges between different paradigms and worldviews (Neal 2006). They are visionary and passionate about making the world a better place, particularly through the world of work. This chapter is about the development and testing of an assessment tool that measures five qualities and five skills of an Edgewalker. Possibilities for future research with this instrument are offered.

Introduction

In the past few years, several new theories of leadership have been proposed that help us to understand more about leaders who are innovative, creative, values-centered, and resilient in the face of change. Waddock (2008) calls them *difference makers* and *pragmatic visionaries*. Frost and Egri (1994) write about academic leaders who dare to care, calling them *intellectual shamans*. Meyerson (2001) writes about *tempered radicals*, "people who want to succeed in their organizations yet want to live by their values or identities, even if they are somehow at odds with the

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dominant culture of their organizations" (Meyerson 2001, p. xi). Neal (2006) conducted research on people who walk between the spiritual world and the material world. Neal's research focuses primarily on leaders in business, and she calls these leaders *Edgewalkers*. They are leaders who are committed to making a positive difference in the world in a way that is in alignment with their faith and spiritual values.

A world view emerging in this global economy is that spirituality and faith are essential to leadership (cf. Collins 2001; Kotter and Cohen 2002; Oakley and Krug 1991; Secretan 2006). The old paradigm and story are not working any more (Renesch 2011; Wheatley and Frieze 2011).

As this new paradigm emerges, along with it comes the need to provide guidance and support to individuals seeking to understand and develop the connection between leadership and spirituality. This chapter is about the development and testing of an assessment tool that measures five qualities and five skills of an Edgewalker. It is designed to be used in development and coaching. Possibilities for future research with this instrument are offered.

Purpose of the Study

Neal (2006) describes five qualities of Edgewalkers: (1) self-awareness, (2) passion, (3) integrity, (4) vision, and (5) playful, and five Edgewalking skills: (1) knowing the future, (2) risk-taking, (3) manifesting, (4) focusing, and (5) appreciating. In 2007, Neal created a 100-item Edgewalker questionnaire that measured these five qualities and five 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. The primary feedback from participants was that the 100-item questionnaire was useful and informative but that it was too long.

The purpose of this chapter is to describe how we refined this questionnaire by reducing the number of items while assuring content validity and reliability. This Edgewalker Profile assessment tool is now used in organizational consulting, for executive coaching, and for research.

How the Questions Were Generated

The original set of questions was generated from the descriptive material of the five qualities and five skills described in the book *Edgewalkers*. There is a 20-item checklist in the book (see Appendix), developed as a result of extensive interviews with leaders who are both innovative and humanistic. This list was used as a starting point for questions. 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 that describe the antitheses of the qualities and skills. Ten 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). Twenty four of the items were written to describe the opposite of the intended construct. These were reverse scored in the analysis process.

Edgewalker Qualities

The definition of an Edgewalker is someone who walks between worlds (Neal 2006, p. 2). They are the bridge builders between different world views. "Edgewalkers are much more oriented toward the future than toward the past, so much so that they can sometimes run roughshod over tradition and can close their ears to what has worked in the past. They are also high on the change continuum, with a basic philosophy of 'If it ain't broke, fix it anyway'" (Neal 2006, p. 112). They are always looking for what's over the leading edge, and they have a fascination with and an interest in cultures and worldviews that are different from their own. As a result, Edgewalkers often become what Waddock (2009) calls *social entrepreneurs*. They create, innovate, and invent things that make a positive difference.

Following are the definitions of the five qualities of an Edgewalker with sample questionnaire items (not all of the listed items were incorporated into the final version of the questionnaire). We suspect that these qualities are inherent in most people to some degree but are found more consistently and at a higher level in people who have a broader world view and who are committed to something greater than the self. According to Neal, these qualities are easier to select for than to develop in leaders.

1. *Self-awareness*: Awareness of your thoughts, values, and behavior and a commitment to spend time in self-reflection with the goal of becoming a better person (Neal 2006, p. 26)

   - I take the time for personal self-reflection.
   - I am often puzzled by the things I do or say (reverse scored).
   - I tend to trust my inner knowing about things.

2. *Passion*: An intense focus on your purpose or the use of your gifts in a way that adds value to your life and the world (Neal 2006, p. 28)

   - I have this feeling that I was called to do something very special and important in this world.
   - People often describe me as intense.
   - I am passionate about my work.

3. *Integrity*: A commitment to live in alignment with your core values, to align your words and your behavior, and to keep your word (Neal 2006, p. 31)

- People describe me as having very high standards.
- If you do not look out for yourself, who will (reverse scored)?
- Most people would describe me as very ethical.

4. *Vision*: The gift of being able to see what others cannot—possibilities, trends, the future, and guidance from the spiritual world—and the ability to take steps to make the vision a reality (Neal 2006, p. 34)

   - I have the ability to sense coming trends before they emerge.
   - The world is so unpredictable that there is no point in trying to create a vision for your life (reverse scored).
   - Sometimes people think I am crazy when I tell them what I think future will be like.

5. *Playful*: A joyful sense of fun and creativity, and an ability to keep everything in perspective (Neal 2006, p. 38)

   - I have a strong sense of adventure.
   - I enjoy other people who are playful.
   - I am always exploring new ideas.

Edgewalker Skills

The qualities described above are the "being" characteristics of Edgewalkers—their inner qualities, their essence, their natural way of being in the world. The five Edgewalker skills are the "doing" characteristics. They are skills that can be developed by anyone through training, attention, and practice, although they seem likely to come more easily to someone high in the five Edgewalker qualities. This hypothesis could be tested in future research.

Following are the definitions of the five Edgewalker skills with sample questionnaire items.

1. *Knowing the future*: The ability to understand and embrace the future (Neal 2006, p. 46)

   - I would say that I am very future-oriented.
   - I am interested in unusual ways of knowing the future such as understanding dreams, using astrology, or receiving spiritual guidance.
   - I do not have a very strong sense of intuition (reverse scored).

2. *Risk-taking*: The ability to try what has not been tried before, to trust your instincts, and to break new ground (Neal 2006, p. 47)

   - My life is pretty much the way I planned it so far (reverse scored).
   - I have made, or am contemplating, a major career shift that no one would have predicted.

• I see failure as just a temporary setback, or a lesson to be learned.

3. *Manifesting*: The ability to take a thought, idea, or vision and take practical steps to bring it into being (Neal 2006, p. 47)

   • I set very clear intentions about what I want to accomplish in my life and work.
   • I believe that I create my own reality.
   • When I have a vision, I am very good at making it real.

4. *Focusing*: The ability to be very centered and to give all your attention to an action or project that has significance and importance (Neal 2006, p. 7)

   • I find it hard to focus on any one thing for very long (reverse scored).
   • I am able to give my full attention to a project I am working on.
   • I believe that if I am really going to make a difference, I have to focus on just one or two things at a time.

5. *Appreciating*: The ability to value others, to see their uniqueness, and to draw out the best in them (Neal 2006, p. 47)

   • I often find myself being a bridge or "translator" for people from very different backgrounds.
   • I find myself attracted to and wanting to learn from people who are very different from me.
   • I prefer to be with people who share my background and interests.

Populations, Demographics, and Return Rates

On November 16, 2008, a request was sent out to 990 people inviting them to help us test the "Edgewalker Questionnaire—Individual" survey instrument. 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 three very different newsletter lists kept by one of the coauthors of this chapter:

• Music newsletter: 240 subscribers
• Spirit at work researchers: 630 subscribers
• 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 a bit of overlap among the groups. 34.6% of the email invitations were opened (319 people). Sixty nine people completed the questionnaire. This represents a 7% return rate for all of the invitations sent and a 22% return rate for those people who read the invitation.

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

We did not ask pilot participants to provide any demographic or organographic data, since this first round of testing focused on the measurement properties of the items and scales.

Analyses and Results

The analyses described below were a collaborative effort between the two coauthors of this chapter, one of whom is an organizational psychologist who has helped several other organizations in similar efforts to develop and refine assessment tools and reports.

The initial scale had 100 items, ten 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).

We used an iterative process to refine the scale. The various steps included:

1. Reviewing written comments from respondents. These comments enabled us to flag items that were seen as confusing by one or more respondents.
2. Calculation of descriptive statistics. We flagged items that had low variance and/or an extremely high or low mean.
3. Factor analysis. Although the ratio of respondents to items was quite low relative to standards for factor analysis, we performed factor analyses to evaluate the statistical groupings of items against the conceptual framework and flag items that did not group as anticipated.
4. Internal consistency reliability analyses (Cronbach's alpha). We computed Cronbach's alpha for each scale to flag items that did not contribute to their internal consistency.

We were pleased to find that the various criteria for keeping vs. dropping items led to consistent conclusions. Combining insights from the various methods allowed us to reduce the set of items from 100 to 50, with five items representing each of the ten subscales. 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 revised instrument has four reverse-scored items.

Testing the Revised Instrument

The revised instrument was pilot tested in 2009 with a group of 15 women who attended an Edgewalker retreat for women leaders. All of the participants found their scores and resultant profiles accurate and useful, providing us preliminary confirmation of content validity.

The instrument was next sent to two organizations for testing. One organization is a project management firm in Puerto Rico with around 200 employees. An invitation to participate in this research was sent to the top management team of 20 people by the CEO. Sixteen leaders completed the questionnaire (75% return rate). The other organization is a faith-based hospital in Arkansas with 1,400 employees. The person in charge of administration, mission, and spirituality sent an invitation to the top leadership team of 35 people, and 20 people responded (57% return rate).

Two other groups have also completed the profile. The first was a group of ten participants in an Edgewalkers workshop, and the second was a group of individuals who was solicited for research purposes; their primary shared characteristic is experience in working in the area of organizational change. Thirty-five individuals from this group responded.

Statistical properties of the final scales are as follows. The possible score range on each item was 5–35 (Table 26.1).

Our target for internal consistency reliability was 0.70 for each scale. By this criterion seven of the ten scales achieved acceptable reliabilities; the passion, integrity, and appreciating scales fell slightly below the target. At this time we have chosen to use the scales as tested. Over time we will look for opportunities to reliability by replacing one or more items in the indicated scales.

Once we selected the final set of items, we computed scores for the ten scales and calculated their intercorrelations. They ranged from 0.19 to 0.62, with all intercorrelations being positive and significant. This suggests that the dimensions have a fairly high degree of overlap in the domains they are measuring.

Characteristic	Self-awareness	Passion	Integrity	Vision	Playful	Knowing the future	Risk-taking	Mani-festing	Focusing	Appre-ciating
Self-awareness	1									
Passion	0.63**	1								
Integrity	0.46**	0.58**	1							
Vision	0.49**	0.56**	0.48**	1						
Playful	0.32**	0.34**	0.46**	0.29**	1					
Knowing the future	0.65**	0.59**	0.40**	0.61**	0.41**	1				
Risk-taking	0.35**	0.43**	0.42**	0.55**	0.48**	0.59**	1			
Manifesting	0.20**	0.39**	0.39**	0.52**	0.16*	0.26**	0.33**	1		
Focusing	0.30**	0.35**	0.42**	0.40**	0.16*	0.19**	0.20**	0.62**	1	
Appreciating	0.43**	0.37**	0.47**	0.49**	0.54**	0.61**	0.56**	0.34**	0.35**	1

Table 26.1 Statistical properties of Edgewalker instrument scales

Scale	Mean	S.D.	Minimum	Maximum	Reliability (Cronbach's alpha)
Self-awareness	28.05	5.51	11	35	0.78
Passion	28.50	4.56	12	35	0.68
Integrity	30.54	3.28	18	35	0.68
Vision	28.00	4.30	14	35	0.72
Playful	28.91	4.56	16	35	0.82
Knowing the future	28.72	4.67	14	35	0.72
Risk-taking	27.35	5.07	7	35	0.82
Manifesting	26.01	4.85	12	35	0.74
Focusing	26.53	4.81	14	34	0.78
Appreciating	28.64	4.20	16	35	0.64

Demographic Variables

We had a limited amount of demographic data, and the availability of demographic data differed by group. Based on the available data, we found no significant differences by gender, educational level, and personal or household income.

Group Comparisons

We expected that there might be differences across the groups, as some represented populations with relatively high levels of exposure to concepts of spirituality and leadership, while others represented more typical organizational populations.

We performed one-way analyses of variance (ANOVA) for each of the Edgewalker scales. The group averages are listed below. An F test shows significant differences on seven of the characteristics:

Characteristic	Pilot	Retreat	Project management	Hospital	Workshop	Research	F	p
N	73	14	19	32	10	23		
Self-awareness	29.50	30.86	28.94	24.37	31.80	25.77	8.1	0.000
Passion	29.01	30.21	29.73	26.72	31.50	26.85	3.9	0.002
Integrity	30.33	32.29	32.84	30.47	32.10	28.63	6.4	0.000
Vision	28.01	30.50	28.79	27.53	30.20	26.34	2.9	0.017
Playful	29.63	31.43	29.89	27.59	31.70	26.26	5.7	0.000
Knowing the future	29.49	32.29	27.37	27.94	32.10	26.14	6.6	0.000
Risk-taking	27.38	31.43	28.84	25.75	31.70	25.03	6.6	0.000
Manifesting	25.08	27.21	26.53	26.72	26.90	26.28	1.0	0.43
Focusing	25.82	27.36	29.00	26.43	27.20	26.23	1.5	0.195
Appreciating	28.83	32.14	28.47	26.47	32.20	27.89	6.1	0.000

The two groups who tend to show the highest scores are those that have been most deeply involved in study and reflection on the Edgewalkers concepts. Those that tend to show the lowest scores are the hospital population and the change management group. Interestingly, the project management firm showed the highest mean score in the area of integrity, perhaps reflecting the presence of a core value in this profession.

Factor Analyses

To explore whether there might be a smaller number of underlying dimensions within the data, we performed an exploratory second-order factor analysis (maximum likelihood extraction with varimax rotation), using the scores from the ten subscales as input. Preliminary results suggest that there are likely two or three second-order factors that will explain a high percentage of variability in the data. We will explore this further once we have more available data.

Relationship with Personal Resilience Characteristics

Personal Resilience is an individual's ability to adapt to high levels of disruptive change while displaying low levels of unproductive behavior (Conner and Hoopes 1993). It comprises a set of constructs related to individual differences in adaptation to change:

1. *Positive*: *The world*. Resilient individuals effectively identify opportunities in turbulent environments.
2. *Positive*: *Yourself*. Resilient individuals have the personal confidence to believe they can succeed in the face of uncertainty.
3. *Focused*. Resilient individuals have a clear vision of what they want to achieve and use this as a guide when they become disoriented.
4. *Flexible*: *Thoughts*. Resilient individuals generate a wide range of ideas and approaches for responding to change.
5. *Flexible*: *Social*. Resilient individuals draw readily on others' resources for assistance and support during change.
6. *Organized*. Resilient individuals effectively develop and apply systems, processes, and structures when dealing with change.
7. *Proactive*. Resilient individuals initiate action in the face of uncertainty, taking calculated risks rather than seeking the comfort of the status quo (Kelly et al. 2003).

One of the defining characteristics of Edgewalkers is the ability to operate effectively in change. For this reason, we decided to explore the relationship between the Edgewalker profile and the personal resilience profile, a tool designed to help individuals understand and develop their resilience.

Three of the groups in this sample were invited to complete both tools: the project management firm, the hospital, and a group of individuals who had completed

the personal resilience profile for other purposes and were invited to also complete the Edgewalker profile as a research participant.

Here are correlations with the resilience characteristics ($n=62$):

Characteristic	Positive: The World	Positive: Yourself	Focused	Flexible: Thoughts	Flexible: Social	Organized	Proactive
Self-awareness	0.52**	0.48**	0.35**	0.24*	0.18	0.20	0.05
Passion	0.59**	0.59**	0.57**	0.09	0.28*	0.12	0.01
Integrity	0.42**	0.38**	0.36**	−0.11	0.13	0.11	0.07
Vision	0.40**	0.43**	0.41**	0.20	0.22	0.22	0.25*
Playful	0.45**	0.24*	0.05	0.28*	0.36**	−0.10	0.23*
Knowing the future	0.44**	0.33**	0.29	0.33**	0.15	−0.03	0.19
Risk-taking	0.48**	0.38**	0.32**	0.38**	0.33**	−0.01	0.47**
Manifesting	0.16	0.44**	0.52**	0.13	0.27*	0.48**	0.36**
Focusing	0.14	0.41**	0.41**	−0.06	0.07	0.42**	0.21
Appreciating	0.34**	0.45**	0.35**	0.37**	0.30*	0.21	0.43**

There is an overall pattern of relationship between the two measures. Either or both of the two positive resilience characteristics, which form the foundation of an individual's ability to thrive in adversity, are significantly related to each of the Edgewalker qualities and skills. The focused resilience characteristic is most strongly related to the Edgewalker elements of passion and manifesting. Manifesting, in turn, is also strongly related to the organized resilience characteristic, which reflects a level of attention to structure and discipline in dealing with change.

There are many research possibilities here for drawing relationships between these and other related constructs. We also anticipate conducting studies with measures such as the cultural creatives index (Ray and Anderson 2000), spiritual intelligence assessment instrument (Wigglesworth 2004), innovation styles (Miller 1998), and with standard personality instruments that measure such characteristics as openness, introversion, and extroversion.

As mentioned earlier, future research could consist of hypothesis testing on whether or not people who are high in Edgewalker qualities are also more likely to develop Edgewalker skills quickly, and/or to a higher degree. Along those same lines, other studies could be conducted about expected behaviors of people who score high on both Edgewalker qualities and skills.

It would also be useful to validate these self-report measures with external reports from peers, customers, managers, and others in a 360 type of format. The coauthors are also working on developing an organizational-level survey that helps to measure the extent to which an organization might have an Edgewalker culture.

Conclusion

We believe that there are some specific elements and qualities that can be used to both predict and strengthen the likelihood that leaders have the capacity to be on the leading edge. The Edgewalkers model is a framework that holds promise in this arena. We believe that by working to develop a solid instrument to measure the attributes of Edgewalkers, and by continuing to explore this model in an intentional and well-grounded way, we can contribute to the well-being of organizations, individuals, and the larger world.

Appendix. Checklist from *Edgewalkers* (Neal 2006)

Are You an Edgewalker?

Check the statements that you agree with. If you agree with 12 or more, you are probably an Edgewalker—and a higher score increases the odds.

1. I have a strong spiritual life.
2. I frequently feel different from most people.
3. I seem to have an ability to sense coming trends before they emerge.
4. I have an unusual combination of interests and passions.
5. I have had mystical or spiritual experiences that have provided guidance in my everyday life and/or work.
6. I speak more than one language or have deep familiarity with more than one culture.
7. I have made, or am contemplating, a major career shift that no one would have predicted.
8. I often find myself being a bridge or "translator" for people from very different backgrounds.
9. I have this feeling that I was called to do something very special and important in the world.
10. I find myself attracted to and wanting to learn from people who are very different from me.
11. I am strongly aware of the problems of the whole planet (global warming, destruction of rain forests, overpopulation, exploitation of people in poorer countries) and want to see some more action on them.
12. People often see me as a leader, even though I am different from most of the people who have been leaders in that organization.
13. I have the ability to listen beyond the words that are spoken.
14. I consciously tune into something higher than myself for guidance and inspiration.
15. It is extremely important to me that my work be aligned with my deepest

values.
16. I have artistic abilities or unusual gifts that I combine with down-to-earth prac-
    tical skills.
17. I tend to break the rules if I think it is for a higher purpose.
18. People often see me as a risk taker, but the things I do do not seem risky to me.
    Somehow I just know they will work out.
19. I have a strong sense of adventure.
20. I find myself exploring new ideas and wondering about what the next new thing
    is in my field or area of interest.

(Neal 2006, pp. 24–25)

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