

**Is it Just Me or Am I the People's Choice? The Stress and Performance Implications of  
(In)congruence Between Self- and Other-Identification as a Leader or Follower**

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**Abstract**

Identifying oneself and being identified by others as a leader (versus a follower) is a critical aspect of informal leadership. But what happens when an organizational member's personal leader identity differs from how others identify them? Grounded in stress appraisal theory, this study explores the individual-level implications of (in)congruence between self- and other-identification as a leader or follower. We develop a conceptual model that explains how different forms of leader identity (in)congruence generate stress appraisals that influence the focal individual's in-role performance. We then describe two complementary studies testing the model. Study 1 is a multi-wave, multi-source field study of 226 coworker dyads. Study 2 is a controlled experiment with 648 full-time employees that assesses the causal relationship between different forms of leader identity (in)congruence and stress appraisals, as well as the generalizability of our findings to other-identification by an entire team. Across both studies, we find that identity incongruence (particularly when the focal individual identifies as a leader but others identify them as a follower) prompts hindrance stress appraisals that reduce in-role performance. In contrast, identity congruence (particularly congruence in identification as a leader) encourages challenge stress appraisals that enhance in-role performance.

*Keywords: leader identity; leadership identity construction theory; stress appraisal; multilevel polynomial regression*

### **Is it Just Me or Am I the People's Choice? The Stress and Performance Implications of (In)congruence Between Self- and Other-Identification as a Leader or Follower**

From corporate boardrooms to athletic fields, leadership is crucial for collective success (Bass, 1985; Cotterill & Fransen, 2016; Zaccaro et al., 2008). Defined as social influence in the pursuit of shared goals (Yukl, 2006), leadership was long thought to be provided exclusively by formally designated leaders (e.g., CEOs, team supervisors). However, recent work has emphasized that individuals who do not occupy formal leadership positions (e.g., front-line workers, analysts) can engage in informal leadership by stepping up to push their teammates to better performance (Hiller et al., 2006; Morgeson et al., 2010; Wellman, 2017). Rather than a purely top-down phenomenon, leadership may be more accurately conceptualized as “a broader, mutual influence process independent of any formal role or hierarchical structure, and diffused among the members of any given social system” (DeRue & Ashford, 2010, p. 627).

The growing acknowledgement of the importance of informal leadership has spurred a wave of studies seeking to understand why, when, and to what effect team members come to see themselves and be seen by others as informal leaders (versus followers). One perspective that has been critical in shaping our understanding of informal leadership is leader identity construction theory (DeRue, 2011; DeRue & Ashford, 2010; Marchiondo et al., 2015; Oc & Bashshur, 2013). This theory explains the origins and implications of leader and follower identities – the perception of oneself or another team member as a leader or a follower (DeRue et al., 2009; Ibarra et al., 2014). Leader and follower identities are thought to develop via identity work, in which a given individual's behavioral “claims” a leader or follower identity and others “grant” the individual that identity and assume a corresponding identity (DeRue & Ashford, 2010). As claims and grants occur throughout a team, they are believed to produce an agreed-upon and

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enduring identity system in which individuals see themselves as either a leader or follower, and this identification is reciprocated by other members of the team (DeRue, 2011).

Although leader identity construction theory views a stable and agreed-upon set of leader and follower identities as the ultimate end-state in most collectives, it acknowledges the potential for “confusion and conflict over leader and follower identities” (DeRue & Ashford, 2010, p. 635). This potential is further suggested by the broader leadership literature. For example, research on leader-member exchange has found leaders and followers frequently disagree about the nature of their relationship (Matta et al., 2015). However, because little empirical research has explored disagreement between individuals’ own identification as a leader or follower and how others identify them, we know little about the different forms of (in)congruence between self- and other-identification team members might experience, or the implications for their appraisals and performance. Better understanding these implications is critical because it would enable scholars to explain and predict why two group members who both identify as informal leaders might view their situation differently and perform differently. For instance, a team member who identifies as a leader and who is also identified as a leader by others is likely to have a fundamentally different experience than a team member who identifies themselves as a leader but is seen as a follower by others.

In this article, we advance our understanding of leader and follower identities by developing and testing theory explaining the individual-level implications of (in)congruence between self- and other-identification as a leader or follower. We first describe the four forms of leader identity (in)congruence that team members might experience. Because leader identities are closely-held and deeply meaningful (Hammond et al., 2017), we argue that individuals experience congruence or incongruence in these identities as inherently stressful (Burke, 1991;

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Meister et al., 2014; Petriglieri, 2011). Leveraging stress appraisal theory (e.g., Lazarus & Folkman, 1984; LePine et al., 2016) as an overarching framework, we develop a conceptual model in which leader identity (in)congruence influences organizational members' in-role performance via members' challenge and hindrance stress appraisals (see Figure 1). We argue that incongruence (relative to congruence) between self- and other-identification as a leader or follower diminishes individual performance through increased hindrance stress appraisals, particularly when individuals internalize a leader identity but are identified by others as a follower. We further propose that congruence (relative to incongruence) between self- and other-identification as a leader or follower enhances individual performance through increased challenge stress appraisals, particularly in cases where individuals identify as a leader and are also seen as a leader by others.

We tested our predictions with two complementary studies. Our first study employed a coworker dyad design whereby two team members reported on the self- and other-identification as a leader or follower and we examined the impact of (in)congruence between self- and other-identification as a leader or follower on individual performance and hindrance and challenge stress appraisals as key mechanisms linking leader identity (in)congruence to individual performance. In Study 2, we used a controlled experiment design that demonstrated the causal relationship between leader identity (in)congruence and stress appraisals and extended our understanding of other-identification to capture not only one team member's perception of other-identification, but also an entire team's perception of the focal individual's identification as a leader or follower.

Our package of studies makes several important contributions. We advance leader identity construction theory by more fully describing the various forms of (in)congruence in

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leader identities that that the members of organizations can experience. Additionally, we establish a theoretical and empirical linkage between identity misalignment and individual-level stress and performance, which allows us to demonstrate not only that such misalignment frequently occurs, but also that these misalignments “matter” for outcomes that are highly relevant to organizations. While prior research have shown that identity misalignment between an individual and their dyadic partner can influence dyadic outcomes such as relationship quality (Tsai et al., 2017) and identity misalignment between an individual and their team can affect team outcomes such as team effectiveness (Cicero, Pierro, & van Knippenberg, 2007; Hogg et al., 2006), our study helps examine how such misalignment can affect individual outcomes like stress appraisals and performance. Additionally, prior studies (e.g., Meister et al., 2014; Petriglieri, 2011) have assumed that individuals experience all forms of identity congruence or incongruence similarly. We challenge this view by drawing on stress appraisal theory to show that different forms of (in)congruence are more likely to be appraised as challenge or hindrance stressors.

### **Implications of Leader Identity Incongruence: A Stress Appraisal Theory Perspective**

Consistent with prior research, we define a leader identity as the view that oneself or another team member belongs to the social category of “leader” (DeRue & Ashford, 2010; Ibarra et al., 2014; Tajfel, 1982). The alternative to a leader identity is a follower identity (DeRue & Ashford, 2010), defined as the view that oneself or another team member belongs to the social category of “follower” (Epitropaki et al., 2017). Leader identity construction theory suggests that the members of a team come to see themselves as either a leader or a follower<sup>1</sup> (DeRue et al.,

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<sup>1</sup> Consistent with prior work (DeRue & Ashford, 2010) and to increase parsimony in our theorizing, we present a binary view of leader identity and assumes that individuals either identify as purely a leader or purely a follower. However, in reality leader identity likely exists on a continuum anchored at one end by a pure leader identity and on

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2009; Gecas, 1982), and also come to be identified as a leader or follower by other team members. This other-identification can occur both at the dyadic level (a particular team member sees the individual as a leader or follower), and at the team level (the team as a whole comes to see the individual as a leader or follower) (Brewer & Gardner, 1996; DeRue & Ashford, 2010).

As noted, the prevailing assumption within the literature on leader identity construction has been that incongruence between self- and other-identification either does not occur or is quickly resolved (e.g., DeRue, 2011). In other words, studies have assumed that individuals who identify as leaders are also seen as leaders by others, and individuals who adopt follower identities are viewed by others in their team as followers. However, as noted, the broader leadership literature has hinted that self- and other-perceptions of leadership may not always align (Matta et al., 2015) and identity conflict has received considerable attention in the identity literature. Identity scholars have highlighted how such conflict is stressful and can influence individual well-being through different methods of coping (Meister et al., 2014), as well as how individuals appraise and resolve identity conflict (Petriglieri, 2011). In the present research, we leverage stress appraisal theory as an overarching framework to develop theory concerning the performance implications of different forms of leader or follower identity (in)congruence.

Stress appraisal theory, sometimes referred to as the transactional theory of stress, provides a deeper understanding of the stressful situations by shifting focus from objective environmental conditions to how individuals subjectively appraise these conditions (Kohler Giancola et al., 2009; Lazarus & Folkman, 1987; Storch et al., 2007). Scholars have proposed there are two main types of stress appraisals: hindrance stress appraisals and challenge stress

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the other by a pure follower identity. In the middle of the continuum lie hybrid identities that might involve, for instance, seeing oneself as mostly a leader but occasionally a follower. Although a full consideration of these hybrid identities is outside the scope of the present manuscript, we acknowledge their likely existence.

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appraisals (Cavanaugh et al., 2000; Webster et al., 2011). Hindrance stress appraisals occur when individuals perceive a situation as an obstacle to their personal growth or goal achievement. In contrast, challenge stress appraisals occur when individuals view a stress-inducing situation as offering the opportunity for reward, mastery and growth due to their belief they can ultimately overcome the stress-related aspects of the situation (Cavanaugh et al., 2000; LePine et al., 2016). Whether individuals appraise a situation as a challenge or hindrance stressor has important implications for how they respond to the situation, and ultimately their job performance. In particular, hindrance stress appraisals are often negatively associated with performance because hindrance stressors diminish motivation and create distractions (Lazarus & Folkman, 1984; LePine et al., 2005; LePine et al., 2016). However, challenge stress appraisals may be positively associated with performance, because challenge stressors often spark positive emotions and enhance motivation and proactivity (LePine et al., 2005; Ohly & Fritz, 2010).

### **A Taxonomy of Leader and Follower Identity (In)congruence**

An important first step of the present research was to define the four combinations of leader identity congruence and incongruence that the members of organizations might encounter. Figure 2 presents the four forms of (in)congruence. Below we describe each form in more detail and provide examples of observable behaviors that might manifest from each.

Quadrant 1 of Figure 2 describes a form of congruence that occurs when an individual internalizes a leader identity and is also identified by others as a leader. This situation reflects agreement between the self and relevant others in identifying the focal individual as a leader, so we refer to it as *leader identity congruence*. A potential behavioral manifestation of leader identity congruence could be an experienced member of a nursing shift who engages in high levels of leadership behavior (giving advice about how best to treat certain patients) and who is

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also sought out by others for their advice about how to deal with challenging patients. Quadrant 2 describes a different form of identity congruence, which occurs when neither the self or others identify the focal individual as a leader (i.e., they identify that person as a follower). We refer to this situation as *follower identity congruence*. Follower identity congruence could manifest as a consulting team member who focuses on carrying out the directions and instructions of other team members, and is also relied on by others to play a supportive role within the team.

Quadrants 3 and 4 outline the two types of incongruence. In Quadrant 3, the focal individual identifies as a follower, whereas others identify them as a leader, a situation we refer to as *leader under-identification*. Leader under-identification could result, for instance, in a manufacturing team member focusing on seeking out others on the team for guidance, but others on the team turning to the focal team member in hopes of receiving motivation and support. In contrast, the incongruence described in Quadrant 4 occurs when the focal individual identifies as a leader, but others identify them as a follower. We refer to this form of incongruence as *leader over-identification*. A potential manifestation of leader over-identification could occur if one member of a team attempts to provide task guidance and social support to other members, but the other members do not notice or appreciate that guidance.

### **Stress and Performance Implications of Identity Congruence and Incongruence**

We argue individuals are likely to experience (in)congruence between self- and other-identification as stressful (Burke, 1991) and attempt to distinguish whether the stressor constitutes a hindrance or challenge (Lazarus & Folkman, 1984; Meister et al., 2014). We further propose that the various forms of leader identity (in)congruence in Figure 2 yield different types of stress appraisals, which impact the focal individual's job performance. We focus on in-role performance, defined as performance on activities that are formally recognized as part of the

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individual's job and that contribute to the organization's technical functions (Borman & Motowidlo, 1993).

Individuals' identities are closely linked to their goals, values, personal growth, and development (Boldero & Francis, 2002). As such, individuals are driven to behave in identity-consistent ways (Sheldon & Elliot, 1999). A leader identity, in particular, may be associated with efforts to influence others and act as a "go-to" person within the team (Wellman, 2017). These informal leadership "claims" can include a wide variety of behaviors (both verbal and non-verbal) but all revolve around asserting one's individually-held identity as a leader (DeRue & Ashford, 2010). Team members who identify as followers are also likely to pursue identity-consistent goals in an effort to claim a follower identity. However, these goals are unlikely to include engaging in leadership. Instead, team members who identify as followers may strive to display loyalty and assist other members wherever possible (Fiske, 1992). Such individuals may also work to acquire new task-related skills that can help them fulfill their assigned responsibilities more efficiently and effectively.

Just as individuals' own identification as a leader or follower is likely to manifest as observable identity claims, the way individuals identify others is likely to result in visible "granting" behavior. As with claims, behavioral grants of a leader or follower identity can take a variety of forms. Individuals may grant another member of their team a leader identity by doing things like "offering them the head of a meeting table" (DeRue & Ashford, 2010, p. 632), or giving verbal affirmations after a the member makes a suggestion. Similarly, individuals may grant a follower identity through actions such as instructing individuals to follow the guidance of others within the team. All of these grants represent an attempt to "bestow a leader or follower identity onto another person" (DeRue & Ashford, 2010, p. 631). The observable grants (or lack

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of grants) that individuals receive to their claims of their individually held identities explain the associations between the various forms of leader identity (in)congruence in our taxonomy and challenge and hindrance stress appraisals.

Stress appraisal theory suggests that both types of identity incongruence (leader over-identification and leader under-identification) are more likely than identity congruence (leader and follower identity congruence) to be appraised by the focal individual as hindrance stressors. Individuals who experience incongruence between their personally-held identities as a leader or follower and how others identify them are likely to infer, due to others' reluctance to grant them their preferred identity, that this identity is threatened. For instance, in situations of leader over-identification, individuals who have self-identified as a leader may engage in claiming behaviors such as offering their opinions about important team decisions or sitting at the head of a meeting table (DeRue & Ashford, 2010). However, because other team members identify the focal individual as a follower, they are likely to attempt to grant a follower identity by doing things like indicating the focal individual should follow the guidance of others in the team or excluding them from critical conversations (Marchiondo et al., 2015; Unsworth et al., 2018). In situations of leader under-identification, individuals who identify as a follower may find their identity-consistent efforts to learn new skills or complete their assigned tasks are made more difficult by others' attempts to grant them a leader identity. This may occur through encouragement to engage in time-consuming leadership activities such as involvement in direction-setting and change management.

Because the leadership-related goals of individuals who over- and under-identify as a leader are likely to be thwarted by the unsupportive actions of others, individuals are likely to appraise identity incongruence as a hindrance stressor – that is, a situation that impedes or

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threatens their goal attainment and personal growth. Indeed, dissonance between different identities is often considered threatening because it can thwart individuals' development and goal pursuit (DiBenigno, 2018). For example, individuals who over-identify as a leader may desire a future formal leadership position and appraise the lack of supportive grants from others as a threat to attaining this position. Individuals who under-identify as a leader may also appraise the situation as a hindrance because such incongruence suggests that their self-identification as a follower is not shared by others, bringing about the potential for "potential harm to the value, meanings, or enactment" of that identity (Petriglieri, 2011, p. 644).

In contrast, leader identity congruence and follower identity congruence are more likely than leader over-identification and leader under-identification to be appraised by the focal individual as challenge stressors. Challenge stress appraisals occur when individuals have a "sense that an investment in time and energy will be rewarded in a demanding environment" (LePine et al., 2016, p. 1039). With regard to identity, individuals are more likely to appraise a situation as a challenge if they perceive that the investments they are making in pursuing their demanding, identity-congruent goals are supported and reinforced by others (Boldero & Francis, 2002). Individuals experiencing identity congruence are likely to infer, based on the supportive granting behavior they observe, that other members of the team validate and encourage them to pursue their individually-held leader or follower identities. With leader identity congruence, individuals are likely to perceive that their personal goals of motivating and directing others and building leadership skills are facilitated by the supportive responses and behavioral grants of leadership they receive at the dyadic and team levels. Similarly, individuals who identify as a follower are likely to adopt identity-congruent goals related to learning and task proficiency. Although these goals may not encompass leadership specifically, they still involve taking on new

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responsibilities, and are therefore likely to be perceived as challenging to the extent they are endorsed and supported by others through grants of a follower identity (DeRue & Wellman, 2009). Therefore, we hypothesize that identity incongruence (leader over-identification and leader under-identification), relative to congruence, is likely to lead to hindrance stress appraisals; whereas identity congruence (leader identity and follower identity congruence), relative to incongruence, is likely to lead to challenge stress appraisals:

*Hypothesis 1a: Relative to identity congruence, identity incongruence is positively related to hindrance stress appraisals.*

*Hypothesis 1b: Relative to identity incongruence, identity congruence is positively related to challenge stress appraisals.*

We further argue that the challenge and hindrance stress appraisals that result from the experience of leader identity (in)congruence influence the focal individuals' in-role performance. The hindrance stress appraisals that result from leader identity incongruence are likely to be negatively associated with in-role performance because such appraisals can lead the individuals to exert less effort towards performing their assigned tasks (LePine et al., 2005). Prior research has consistently found a negative relationship between both hindrance stressors and hindrance stress appraisals and in-role performance (LePine et al., 2005; LePine et al., 2016; Ma et al., 2021). In contrast, the challenge stress appraisals that result from leader and follower identity congruence are likely to be positively associated with in-role performance. When individuals see a stressful situation as an opportunity for growth and development, they are likely to view their work activities more positively, (Gonzalez-Morales & Neves, 2015), feel more motivated to perform their assigned tasks well (LePine et al., 2005), and exert more effort towards task completion (Edwards et al., 2014), all of which are likely to enhance in-role performance. Although prior research has resulted in mixed findings on the relationship between challenge stress appraisals and performance (LePine et al., 2016; Mitchell et al., 2019; Rosen et al., 2020;

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Stout & Dasgupta, 2013), a meta-analytic review found a positive relationship between challenge stressors and performance (e.g., LePine et al., 2005). Thus, we hypothesize:

*Hypothesis 2a: There is a negative indirect association between incongruence (vs. congruence) in self-and other identification as a leader or follower and the focal individual's in-role performance via elevated hindrance stress appraisals.*

*Hypothesis 2b: There is a positive indirect association between congruence (vs. incongruence) in self-and other identification as a leader or follower and the focal individual's in-role performance via elevated challenge stress appraisals.*

### **The Perils of Leader Over-Identification (Versus Leader Under-Identification)**

We further propose that of the two forms of leader identity incongruence in our taxonomy, leader over-identification is likely to be appraised as a greater hindrance stressor than leader under-identification, and thereby be more detrimental to in-role performance. As DeRue and Ashford (2010, p. 638) suggested, “acting as a leader and being seen as a leader is a socially valued and rewarded ‘ideal self’ (Higgins et al., 1987; Markus & Nurius, 1986) in many organizational settings”, which may “create a motivation to claim this identity.” Individuals often strive to become leaders for the status and feelings of importance it provides. As a result, when their attempts to “claim” a leader identity are not reciprocated by grants from others, they are likely to appraise the situation as a hindrance. In contrast, there are fewer incentives to internalize a follower identity in most organizations, and therefore a follower identity may be less central to individuals’ overall self-concept (Ashforth & Schinoff, 2016). Individuals may therefore be less likely to perceive it as a hindrance when their behavioral claims of a follower identity are not reciprocated by others (Petriglieri, 2011). Thus, it follows that the greater importance individuals place on a leader versus follower identity is likely to increase hindrance stress appraisals in instances of leader over-identification relative to leader under-identification.

Additionally, the support and endorsement of others is likely to be more critical to the goal fulfillment of individuals who identify as leaders rather than followers. In order to exert

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leadership influence, individuals need to have supportive followers (Hollander, 1992). As such, individuals who identify as a leader are reliant on the deferential “granting” responses of others in order to carry out their goals. If others do not provide these behavioral grants, as is the case with leader over-identification, individuals are likely to perceive that important identity-related goals are being threatened, which can be perceived as a hindrance (Lammers et al., 2008; Magee & Galinsky, 2008; Porath & Pearson, 2012). In contrast, individuals who identify as followers (as is the case with leader under-identification), are less reliant upon others to achieve their central workplace goals (task mastery, carrying out the directives of others). Individuals who under-identify as leaders are therefore less likely than individuals who over-identify as leaders to view the lack of behavioral reinforcement they receive from others as jeopardizing their ability to achieve their goals. We therefore expect leader over-identification to be more strongly associated with hindrance stress appraisals than leader under-identification. Given the negative association between hindrance stress appraisals and in-role performance we noted earlier, we further propose that the difference in hindrance stress appraisals produced by leader over-identification versus leader under-identification will carry over to influence the focal individual’s in-role performance.

*Hypothesis 3: Leader over-identification is more positively associated with hindrance stress appraisals than leader under-identification*

*Hypothesis 4: The negative indirect association between leader identity incongruence and in-role performance via increased hindrance stress appraisals is stronger for leader over-identification than leader under-identification.*

We do not anticipate that leader under-identification and leader over-identification will differ in their relationships with challenge stress appraisals. Challenge stress appraisals occur when individuals feel they have sufficient resources available to overcome the stressful situation (Jerusalem & Schwarzer, 1992; Lazarus & Folkman, 1984). With leader over-identification, individuals are unlikely to feel that they have social resources necessary to excel as a leader due

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to the lack of support they perceive from others, which is less likely to elicit a challenge stress appraisal. Similarly, individuals experiencing leader under-identification are unlikely to feel they are supported socially in pursuing their identity-consistent goal, which is to enact their follower identity. Because individuals experiencing leader over-identification and leader under-identification are unlikely to feel they have the resources needed to pursue identity-consistent goals, we expect both of these forms of leader identity incongruence to yield relatively low levels of challenge stress appraisals.

### **The Benefits of Leader (Versus Follower) Identity Congruence**

Finally, we propose that leader identity congruence is more likely to be appraised as a challenge stressor than follower identity congruence. As we have noted, challenge stress appraisals occur if a) individuals view a situation as conducive to their growth and development and b) individuals feel they have sufficient personal and social resources available to overcome the difficulties posed by a situation (Jerusalem & Schwarzer, 1992; Lazarus & Folkman, 1984). Individuals who identify as leaders often work to develop their individual skills and capabilities (DeRue & Wellman, 2009). Moreover, engaging in challenging situations (e.g., assuming unfamiliar responsibilities, managing diverse stakeholders, working across organizational boundaries) is a fundamental element of leadership (McCall et al., 1988; Ohlott et al., 1994). Individuals who self-identify as a leader identity are therefore likely to feel pulled by their identity to engage in challenging situations that stimulate their growth and development. In instances of leader identity congruence, the supportive grants of leadership that individuals witness from others may help the focal individual feel confident in their ability to meet the challenges posed by their leader identity. For example, Day et al. (2009) suggest that receiving enthusiastic support for a leader identity by peers leads individuals to feel motivated and believe

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that they can overcome future leadership challenges. Thus, individuals who self-identify as a leader and have that identity reciprocated by others are likely to perceive that engaging in challenging situations is conducive to their future growth as a leader, and also that they have high levels of support to assist them in navigating the challenges. This is likely to increase the extent to which they appraise their situation as a challenge stressor.

Individuals who internalize a follower identity and have that identity affirmed by others may also feel called by that identity to learn and grow in certain ways (e.g., learning a new work process, improving their task efficiency). However, these challenges may be seen as more modest than those experienced by individuals who internalize a leader identity. As noted, the aspirations of individuals who identify as a follower are less likely to include developing new ideas and initiatives, and more likely to focus on carrying out the requests and directives of others (Fiske, 1992). Occasionally, these directives may involve acquiring new skills, but the appraising the experience as a challenge is less likely because a follower identity is also often associated with responsibility, obligation and accuracy (Pierro et al., 2009). Thus, even though individuals who experience follower identity congruence are likely to feel appropriately endorsed and supported by others in pursuing their identity-based goals, these goals are less likely to include seeking out challenging experiences. As a result, we propose that follower identity congruence is less positively associated with challenge stress appraisals than leader identity congruence.

*Hypothesis 5: Relative to follower identity congruence, leader identity congruence is positively associated with challenge stress appraisals.*

*Hypothesis 6: The positive indirect effect between identity congruence and in-role performance is stronger for leader identity congruence (vs. follower identity congruence) via increased challenge stress appraisals.*

We do not expect leader and follower identity congruence to be associated with different

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levels of hindrance stress appraisals. As noted earlier, hindrance stress appraisals occur when individuals perceive that their present situation poses an obstacle to their personal growth. Because individuals experiencing leader and follower identity congruence are likely to feel supported and encouraged by others in pursuing their internalized identity, they are unlikely to perceive the identity-associated obstacles that would prompt a hindrance stress appraisal.

### **Overview of Studies**

We test our predictions using two complementary studies<sup>2</sup>. Study 1 tests our full model (Hypotheses 1-6) by examining the role of stress appraisals in transmitting the effects of identity (in)congruence to in-role performance using a dyadic measure of other-identification. Study 2 is a controlled experiment that examines the causal relationship between identity (in)congruence and stress appraisals (Hypotheses 1, 3, and 5) using both team and dyadic operationalizations of other-identification. Both studies were approved by the Institutional Review Board at the University of Nebraska-Lincoln (“Leader Identity,” IRB: 20200420299EX).

### **Data Transparency and Openness**

For all studies and supplemental analyses, we describe our sampling plan and all measures, and we adhered to the *Journal of Applied Psychology* methodological checklist. The data, syntax, and research materials for the reported studies are available by request from the first author. Data were analyzed using Mplus version 8.7 (Múthen & Múthen, 2021). The study designs, hypotheses and analyses were not pre-registered.

### **Study 1**

#### **Sample, Procedures, and Measures**

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<sup>2</sup> An additional study that examined the direct effect between identity (in)congruence and in-role performance in a collegiate football team over the course of a season was removed during the review process due to the review team’s concerns that it did not robustly test our proposed hypotheses. Interested readers should contact the corresponding author for further details on the removed study.

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We recruited a sample of 226 coworker dyads (one focal employee and one coworker) employed across a variety of industries through a Qualtrics panel, and collected data via online surveys. At Time 1, employees reported on self-identification as a leader or follower and coworkers reported on other-identification. At Time 2 (two weeks later), employees reported on hindrance and challenge stress appraisals and coworkers reported on the focal employee's in-role performance (see online supplement A for a full list of items). Separating our variables by time and source helped reduce the potential for common method variance (Podsakoff et al., 2012) and built on prior research demonstrating that stress appraisals influence in-role performance rather than the reciprocal relationship (e.g., LePine et al., 2016). We limited our sample to coworker dyads that were embedded in a single team (with no leader or a leader external to the team), to maximize the likelihood of other-identification of an informal leader. Within the sample, 58% of the focal employees are female; the average organizational tenure is 9.2 years; and participants have worked with their dyadic partner for an average of 5.5 years. All items for our study measures are included in online supplement A. Unless otherwise indicated, all measures used 7-point, Likert-type scales (1 – Strongly Disagree, 7 – Strongly Agree).

### *Self-Identification*

Participants reported on their self-identification as leader or follower using the four-item measure from Lee et al. (2016;  $\alpha = .89$ ). This measure has been used in recent empirical work on leader identity (e.g., Lanaj et al., 2022; Jennings et al., 2022) and undergone rigorous construct validation (Lee et al., in press). Sample items include: "I believe I have the characteristics of a leader" and "I see myself as a leader."

### *Other-Identification*

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We measured other-identification as a leader or follower using the same measure as we used for self-identification with the coworker reporting on the focal employee's identity as a leader or follower ( $\alpha = .87$ ). Samples items include: "I believe [Focal Employee's Name] has the characteristics of a leader" and "I see [Focal Employee's Name] as a leader." This approach aligns with prior research using polynomial regression (cf. Cole et al., 2013; Matta et al., 2015) and allows us to use a continuous measure of other-identification.

### *Hindrance and Challenge Stress Appraisals*

Focal employees reported their hindrance and challenge stress appraisals using LePine et al.'s (2016) 6-item measure adapted to focus on leadership ( $\alpha = .88$  for hindrance stress appraisals;  $\alpha = .76$  for challenge stress appraisals). Sample items for hindrance stress appraisals include: "During the last two weeks, I have felt that being a leader at work ... thwarts my personal growth and well-being and ... hinders my feelings of personal accomplishment." Sample items for challenge stress appraisals also began with the prompt "During the last two weeks, I have felt that being a leader at work ..." and included: (1) challenges me to achieve personal goals and accomplishments and (2) helps to improve my personal growth and well-being."

### *In-Role Performance*

Coworkers reported on the focal employee's performance using MacKenzie et al. (1991)'s 5-item measure of in-role performance ( $\alpha = .97$ ). Following the prompt, "During the past two weeks, I would say that [Focal Employee's Name] ..." the coworker indicated their agreement with items such as: "... has been outstanding at their job" and "... was one of the best at what they do."

### *Control Variables*

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Although all participants were on the same team as their coworker, all coworkers may not have had the same opportunity to observe the focal employee's performance. Thus, we asked coworkers to indicate the opportunity they had to observe the focal employee (cf. Baer et al., 2018; Judge & Ferris, 1993;  $\alpha = .85$ ). In addition, prior work on interpersonal relationships and performance ratings suggests the nature of the relationship between the rater and the ratee (employee and coworker, respectively, in our sample) can impact performance ratings (e.g., Borman et al., 1995; Kacmar et al., 2003). Therefore, we also controlled for the relationship between focal employee and coworker using Sherony and Green's (2002) 7-item measure of coworker-member exchange ( $\alpha = .89$ ), reported by the coworker.

### Analyses

We tested our hypotheses using Mplus 8.7 (Múthen & Múthen, 2021) and conducted a path analysis with response surface methodology (see Edwards, 2002; Edwards & Cable, 2009; Edwards & Parry, 1993). Specifically, we generated five polynomial terms –  $b_1$ , other-identification,  $b_2$ , self-identification,  $b_3$ , other-identification<sup>2</sup>;  $b_4$ , other-identification  $\times$  self-identification;  $b_5$ , self-identification<sup>2</sup> – and regressed those terms on hindrance stress appraisals and challenge stress appraisals. Said differently, we estimated the following equations:

$$H = b_0 + b_1O + b_2S + b_3O^2 + b_4(OS) + b_5S^2 + e$$

$$C = b_0 + b_1O + b_2S + b_3O^2 + b_4(OS) + b_5S^2 + e$$

In this equation,  $H$  represents hindrance stress appraisals,  $C$  represents challenge stress appraisals,  $O$  represents other-identification, and  $S$  represents self-identification of a leader or follower identity. Then, we used the regression coefficients to plot two three-dimensional response surfaces with other- and self-identification on the perpendicular horizontal axes, and hindrance and challenge stress appraisals on the vertical axes (cf. Cole et al., 2013; Matta et al.,

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2015; Rosen et al., 2020).

Following Rosen et al. (2020), we tested the indirect effects of (in)congruence on in-role performance through stress appraisals by examining the different components of the response surface plots. Specifically, we examined the significance of the incongruence curve (Hypothesis 2a-b), the incongruence slope (Hypothesis 4), and the congruence slope (Hypothesis 6) as  $\alpha$  path equivalents (i.e., the first stage of the indirect effect) and the effect of the mediator on the outcome (controlling for the predictor variables) as the  $b$  path (i.e., the second stage of the indirect effect). We then used these estimates to calculate each of the indirect effects ( $ab$ ) and generate 95% bias-corrected confidence intervals (20,000 iterations) using the parametric estimates to assess significance of the indirect effect (Preacher & Selig, 2012). This approach is similar to the commonly utilized block variable approach to determine indirect effects in polynomial regression analyses (Edwards & Cable, 2009). Unlike the block variable approach, it allows us to simultaneously, but separately examine the different effects of incongruence and congruence necessary to fully test Hypotheses 4 and 6 (cf. Rosen et al., 2020). The pattern and significance of the results for Hypothesis 2a-b are consistent regardless of which approach is used (see online supplement B for full results from the block variable approach).

### **Results**

Table 1 shows the descriptive statistics and correlations. Prior to running our analyses, we examined the prevalence of each type of (in)congruence at each time period (see Shanock et al., 2010). As shown in Table 2, 32.8% of our cases exhibited leader over- and under-identification. This percentage not only aligns with other recently published work examining congruence (cf. Richard et al., 2021; Warren & Schwam, 2022), but also exceeds the suggested 10% threshold for examining incongruence (Shanock et al., 2010) thereby highlighting the

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importance of understanding the implications of identity incongruence as well as congruence.

We also conducted a series of confirmatory factor analyses (CFA) to confirm construct distinctiveness. Our CFA findings show a four-factor model with self- and other-identification and hindrance and challenge stress appraisals as distinct constructs ( $X^2 = 230.2$ ,  $df = 71$ , CFI = .91, RMSEA = .10, SRMR = .05) exhibited an adequate fit, and (importantly) fit the data better than a three-factor model with the types of stress appraisals as one factor and the types of leader identity as distinct factors ( $X^2 = 404.7$ ,  $df = 74$ , CFI = .79, RMSEA = .14, SRMR = .09;  $\Delta X^2 = 174.5$ ,  $p < .001$ ) as well as a three-factor model with the types of leader identity as one factor and the types of stress appraisals as distinct factors ( $X^2 = 488.7$ ,  $df = 74$ , CFI = .73, RMSEA = .16, SRMR = .08;  $\Delta X^2 = 258.5$ ,  $p < .001$ ). The four-factor model also fit the data better than a one-factor model ( $X^2 = 1016.2$ ,  $df = 77$ , CFI = .40, RMSEA = .23, SRMR = .16;  $\Delta X^2 = 786.0$ ,  $p < .001$ ). Together, these results offer support for construct distinctiveness.

Our full polynomial regression results are provided in Table 3. Following the guidelines set out by Edwards and Cable (2009), we examined two key conditions of the response surface to test Hypotheses 1a-b, which propose that incongruence between self-and other-identification as a leader or follower is positively associated with hindrance stress appraisals and negatively associated with challenge stress appraisals. For the first condition, we examined the curvature of the incongruence lines ( $O = -S$ ). In support of Hypothesis 1a, the positive and significant curvature along the incongruence line demonstrates that incongruence between self-identification and other-identification (i.e., leader over- or under-identification) is positively associated with hindrance stress appraisals (curvature = .41,  $SE = .15$ ,  $p < .01$ ) and, in support of Hypothesis 1b, the negative and significant curvature along the incongruence line between self-identification

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and other-identification (i.e., leader over- or under-identification) is negatively associated with challenge stress appraisals (curvature =  $-.32$ ,  $SE = .13$ ,  $p = .02$ ).

For the second condition, we examined whether hindrance stress appraisals were minimized at the point of congruence (i.e., the trough of the response plot; cf. Lanaj et al. 2018) as evidenced by a slope of 1 ( $p_{21}$ ) and an intercept of 0 ( $p_{20}$ ) for the second principal axis and whether challenge stress appraisals were maximized at the point of congruence (i.e., the peak of the response plot; Matta et al., 2015) by looking for a slope of 1 ( $p_{11}$ ) and an intercept of 0 ( $p_{10}$ ) for the first principal axis (Edwards, 2002; Edwards & Parry, 1993). In support of Hypothesis 1a, we found that the intercept of the second principal axis ( $p_{20} = 1.86$ , 95% CI [-1.23, 2.15]) did not significantly differ from zero, and the slope of the second principal axis ( $p_{21} = .47$ , 95% CI [-12.93, 16.65]) did not significantly differ from 1. In support of Hypothesis 1b, we found that the intercept of the first principal axis ( $p_{10} = -3.13$ , 95% CI [-92.56, 117.12]) did not significantly differ from zero, and the slope of the first principal axis ( $p_{11} = 12.28$ , 95% CI [-44.14, 37.52]) did not significantly differ from 1. Together these results fully support Hypotheses 1a by revealing that hindrance stress appraisals are maximized when there is incongruence between self- and other-identification and Hypothesis 1b by revealing that challenge stress appraisals are minimized when there is incongruence between self- and other-identification.

Hypotheses 2a proposes that, relative to congruence, incongruence between self- and other-identification as a leader or follower is negatively associated with in-role performance through increased hindrance stress appraisals. First, we found a significant, negative relationship between hindrance stress appraisals and in-role performance ( $\beta = -0.11$ ,  $SE = .06$ ,  $p = .04$ ). Using the curvature of the incongruence line from the polynomial results as the  $\alpha$  path (curvature =  $.41$ ,  $SE = .15$ ,  $p < .01$ ), we found a negative indirect effect of incongruence on in-role performance

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through hindrance stress appraisals ( $IND = -.01$ , 95% BCCI: [-.022, -.001]) such that as incongruence increases, in-role performance decreases. These results support Hypothesis 2a.

Hypotheses 2b proposes that congruence between self-and other-identification as a leader or follower is positively associated with in-role performance through increased challenge stress appraisals. We found a significant, positive relationship between challenge stress appraisals and in-role performance ( $\beta = 0.26$ ,  $SE = .08$ ,  $p < .01$ ). Using the curvature of the incongruence line from the polynomial results as the  $\alpha$  path (curvature =  $-.32$ ,  $SE = .13$ ,  $p = .02$ ), we found a positive indirect effect of congruence on in-role performance through challenge stress appraisals ( $IND = .04$ , 95% BCCI: [.017, .064]) such that as congruence increases, in-role performance increases, offering support for Hypothesis 2b.

To test Hypothesis 3, which predicts leader over-identification is more positively associated with hindrance stress appraisals than leader under-identification, we calculated the lateral shift quantity (LSQ;  $[b_2 - b_1] / [2 \times (b_3 - b_4 + b_5)]$ ), which estimates the magnitude and direction of a lateral shift of the response surface along the incongruence line (Atwater et al., 1998; cf. Cole et al., 2013). We found a negative, significant lateral shift quantity (LSQ =  $-3.81$ , CI [-7.27, -0.36]; Atwater et al., 1998), which suggests that an individual's level of hindrance stress appraisal decreases as one moves along the incongruence line (i.e., examines the slope) from high self-identification and low other-identification (i.e., leader over-identification) to low self-identification and high other-identification (i.e., leader under-identification). Thus, Hypothesis 3 was supported.

Hypothesis 4 predicts that the negative indirect association between incongruence in self- versus other-identification and in-role performance via hindrance stress appraisals is stronger for leader over-identification than leader under-identification. Using the slope of the incongruence

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line (slope = -3.13,  $SE = 1.21$ ,  $p = .01$ ) from the polynomial results as the  $\alpha$  path (cf. Matta et al., 2015), we found a positive indirect effect of leader over-identification as opposed to leader under-identification on in-role performance through hindrance stress appraisals ( $IND = .02$ , 95% BCCI: [.002, .040]) such that as one moves along the incongruence line from leader over-identification to leader under-identification, in-role performance increases. These results support Hypothesis 4.

Next, we tested Hypothesis 5, which predicts that leader identity congruence is more positively associated with challenge stress appraisals than follower identity congruence, by examining a third condition of the response surfaces: the slope of the congruence lines ( $O = S$ ). As shown in Table 3, this slope was positive and statistically significant (slope = 2.25,  $SE = .47$ ,  $p < .01$ ). Therefore, Hypothesis 5 was supported.

Finally, Hypothesis 6 predicts that the positive indirect association between congruence in self- and other-identification on in-role performance through challenge stress appraisals is stronger in cases of leader identity congruence as compared to follower identity congruence. Using the slope of the congruence line as  $\alpha$  path, we found a positive indirect effect of leader identity congruence as opposed to follower identity congruence on in-role performance through challenge stress appraisals ( $IND = .25$ , 95% BCCI: [.091, .491]), indicating that as one moves along the slope of the congruence line from follower identity congruence to leader identity congruence, in-role performance increased. Thus, Hypothesis 6 was supported.

### **Supplemental Analyses**

To explore the robustness of our findings to another approach to assessing self-and other-identification as a leader or follower, we re-ran our analyses using an alternate measure of leader identity. Specifically, we identified an additional scale of leader identity (i.e., Hiller, 2005) that,

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although not validated in a peer reviewed study, was used in recent publications (e.g., Lanaj et al., 2021; Venus et al., 2019). The polynomial regression results are consistent<sup>3</sup> across both measures. Specifically, with both alternative measures, we found a positive and significant curvature along the incongruence line in the hindrance stress appraisal model (curvature = .41,  $SE = .18$ ,  $p = .03$ ;) and a negative and significant curvature along the incongruence line in the challenge stress appraisal model (curvature =  $-.52$ ,  $SE = .13$ ,  $p < .01$ ;) . We also found that the slope of the incongruence line was negative and significant in the hindrance stress appraisal model (slope =  $-2.80$ ,  $SE = 1.28$ ,  $p = .03$ ;) and the slope of the congruence line was positive and significant in the challenge stress appraisal model (slope =  $1.97$ ,  $SE = .59$ ,  $p < .01$ ;) . These findings offer support for the robustness of our observed effects to multiple measures of self- and other-identification as a leader or follower.

### Study 1 Discussion

Using a sample of coworker dyads, we tested the indirect effects of identity (in)congruence on in-role performance through hindrance and challenge stress appraisals. Our findings – which are robust across multiple measures of identification as a leader or follower – reveal that elevated identity incongruence, particularly leader over-identification, leads to higher levels of hindrance stress appraisals and identity congruence, particularly leader identity congruence, leads to higher levels of challenge stress appraisals. In addition, we found that hindrance stress appraisals explain the negative association of identity incongruence (vs. congruence) as a leader or follower and in-role performance, as well as the more negative association between leader over-identification (vs. leader under-identification) and in-role

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<sup>3</sup> The results with Hiller's (2005) measure of self-identification showed that the intercept for second principle axis for the hindrance appraisals plot did not include zero ( $p_{20} = 2.69$ , CI [1.7, 3.7]) indicating that the trough of the plot was shifted from zero. Some scholars suggest this offers insight into the lowest point rather than serving as a necessary condition. The results of the supplemental analyses are available from the first author on request.

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performance. Furthermore, enhanced challenge stress appraisals explain the positive association between identity congruence (vs. incongruence) and in-role performance and that, relative to follower identity congruence, leader identity congruence is more positively associated with challenge stress appraisals, and thereby in-role performance.

### **Study 2**

To enhance our ability to draw causal inferences, we conducted a controlled experiment in which we tested Hypotheses 1, 3, and 5 by manipulating identity (in)congruence and assessing the effects on hindrance and challenge stress appraisals. Moreover, leader identity construction theory suggests that, in addition to dyadic-level other-identification as a leader or follower, collective-level other identification is also relevant (although its effects may be more modest, DeRue, 2011; DeRue & Ashford, 2010; Sedikides, Gaertner, Luke, O'Mara, & Gebauer, 2013). To determine if our findings generalize to the other major type of other-identification outlined in leader identity construction theory, we extended our design in Study 1 to examine other-identification as a leader or follower at both the dyadic and team levels.

### **Participants and Procedure**

We collected data from 648 participants recruited via a Qualtrics panel. Our sample size was based on a power analysis conducted following Cohen's (1988) guidance and assuming a moderate effect size which indicated that each group should contain approximately 88 participants (Faul et al., 2007). Our research design features 8 groups, so each group had 81 participants (648 participants/8 groups = 81) indicating sufficient power for our analyses. The participants were all full-time employees currently working on a team that had the potential for multiple informal leaders. We employed 2 (*self-identification*: leader vs. follower) x 4 (*other-identification*: dyadic leader vs. dyadic follower vs. team leader vs. team follower) between-

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subjects design with random assignment to condition. We designed the study based on an adapted version of the procedure developed by Baer et al. (2021). Participants read a business scenario in which they worked as part of a team with no formal leaders and were preparing for an annual personal development survey:

*You are an employee at the Westgate Group – a marketing firm that offers various consulting and marketing services to its clients. You have been working with the firm for about two years and have generally enjoyed the work that you do. The company is organized so that everyone works in teams. There are no formal, internal leaders of the team; only a management team that oversees all of the marketing teams. You work at the company headquarters that features an open office floor place where people work in a shared space which is a good thing because there are a lot of interactions among your team members and you feel that all of the team members know each other well.*

*Once a year, management asks your team to complete a survey focused on personal development. One part of this survey will ask you to think about yourself as a leader and ask all of your team members about you as well. The great part about your company is that you do not have to be identified as a leader to be promoted; there are other ways to be promoted as well. This information is just used as a personal development tool. As you ponder the upcoming survey, you think about two things: 1) what you will write about yourself and 2) what other members of the team will write about you.*

After reading the scenario, participants were provided information about how they viewed themselves, and how others on the team viewed them (see below). Then, after reading the scenario, participants were asked to appraise the level of challenge and hindrance stressors they would perceive in the scenario described. We used the same measures from Study 1 to rate hindrance ( $\alpha = .97$ ) and challenge stress appraisals ( $\alpha = .83$ ).

### ***Self-Identification Manipulation***

We manipulated self-identification as a leader or follower by altering the descriptions participants' received about how they viewed themselves in the scenario. Participants in the self-identification (leader) condition were given several pieces of information indicating they saw themselves as an informal leader of the team:

*High Self-Identification: As you think about your personal development, you are very confident that your role and identity on the team is generated by your ability to*

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*really energize other team members to achieve their best and inspire the team to go beyond their own self-interests and focus on the good of the team. You also believe that your identity on the team is related to leadership and you are confident in your ability to prioritize getting others on the team to identify with the team's central mission.*

Participants in the self-identification (follower) condition were given information suggesting they viewed themselves as a follower:

*Low Self-Identification: As you think about your personal development, you are very confident that you energize yourself to achieve your best and inspire yourself to work on your part for the good of the team. Energizing and inspiring others is not a part of your identity on the team, but you do an excellent job of completing your part of the team's projects. You are also very confident that your identity on the team is not at all related to leadership; instead, you prioritize making sure that you understand the team's central mission and let others work through their own process to understand the team's central mission.*

### ***Other-Identification Manipulation***

For the other-identification manipulation, we gave participants information about either how one team member (dyadic identification) or the entire team (team identification) perceived them as a leader or follower using the same language as provided in the self-identification manipulation. As such, participants received one of the four manipulations outlined below:

*High Dyadic Other-Identification: As you think about how Taylor (another team member) will fill out the form about you, you are very confident that Taylor will focus on your ability to really energize other team members to achieve their best and inspire the team to go beyond their own self-interests and focus on the good of the team. You are also really confident that Taylor will highlight that your identity on the team is related to leadership and that you prioritize getting the others on the team to identify with the team's central mission.*

*Low Dyadic Other-Identification: As you think about how Taylor (another team member) will fill out the form about you, you are very confident that Taylor will talk about how you energize yourself to achieve your best and inspire yourself to work on your part for the good of the team. Taylor will definitely recognize that energizing and inspiring other team members is not at all a part of your identity of the team, but that you do an excellent job of completing your part of the team's projects. Taylor likely also believes that your identity on the team is not at all related to leadership; instead, Taylor is very confident that you prioritize making sure that you understand the team's central mission and let others work through their own process to understand the team's central mission.*

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*High Team Other-Identification: As you think about how the rest of the team will fill out the form about you, you are very confident that the entire team is likely to focus on your ability to really energize other team members to achieve their best and inspire the team to go beyond their own self-interests and focus on the good of the team. You are also really confident that the entire team will highlight that your identity on the team is related to leadership and that you prioritize getting the others on the team to identify with the team's central mission.*

*Low Team Other-Identification: As you think about how the entire team will fill out the form about you, you are very confident that the entire team will talk about how you energize yourself to achieve your best and inspire yourself to work on your part for the good of the team. The entire team will definitely recognize that energizing and inspiring other team members is not at all a part of your identity of the team, but that you do an excellent job of completing your part of the team's projects. The team also believes that your identity on the team is not at all related to leadership; instead, the entire team is very confident that you prioritize making sure that you understand the team's central mission and let others work through their own process to understand the team's central mission.*

### **Analyses and Results**

#### ***Manipulation and Realism Checks***

To assess the effectiveness of our experimental manipulations, we used the 4-item measure from Study 1 referencing self-identification ( $\alpha = .93$ ; Lee et al., 2106) and shifted the referent to the coworker for dyadic identification ( $\alpha = .94$ ), and the team for team identification ( $\alpha = .96$ ) to conduct a series of analyses of variance (ANOVAs). Across the conditions, participants in the self-identification (leader) conditions reported significantly higher levels of leader identity than those in the self-identification (follower) conditions (means = 4.35 vs. 4.23,  $F = 4.48$ ,  $p = .04$ ). Similarly, participants in both of the other-identification conditions also reported significantly different means. Specifically, in the dyadic identification (leader) conditions reported significantly higher levels of dyadic identification as a leader than participants in the dyadic identification (follower) conditions (means = 4.26 vs. 4.01,  $F = 6.00$ ,  $p = .02$ ) and in the team dyadic (leader) conditions, the participants reported significantly higher team identification than participants in the team identification (follower) conditions (means =

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4.27 vs. 3.97,  $F = 9.02$ ,  $p < .01$ ). These results reveal that our manipulations worked as intended.

We also included a three-item scenario realism check ( $\alpha = .86$ ) to ensure the scenarios were sufficiently realistic (Chen et al., 2011; see online supplement A). The means for the items were high (3.89 to 4.03 out of 5), and consistent with those reported for other scenario-based experiments (Baer et al., 2021; Chen et al., 2011; Farh et al., 2017). An ANOVA indicated no significant difference in realism across the eight conditions ( $F(7) = 1.22$ , *n.s.*).

### **Results**

The means of each condition are depicted in Figures 5-6 and Tables 4-5. We tested the relationship between (in)congruence of self- and other-identification and stress appraisals using ANOVA with planned post-hoc comparisons (cf. Baer et al., 2021). Specifically, we compared: 1) high and low self-identification as a leader or follower with high and low other-identification from a dyadic partner (indicated as dyadic in the results) and 2) high and low self-identification as a leader or follower with high or low other-identification from the team as a whole (indicated as team in the results).

Hypothesis 1a predicts a positive association between *incongruence* in self- and other-identification as a leader or follower and hindrance stress appraisals whereas Hypothesis 1b predicts a positive association between *congruence* and challenge stress appraisals. We tested these hypotheses in two ways. First, we tested the difference in mean levels of hindrance stress appraisals by comparing each type of congruence to both types of incongruence (see Tables 4-5). Specifically, for Hypothesis 1a, we found significant differences between means levels of hindrance stress appraisals when comparing leader identity congruence with leader over-identification (dyadic  $d = -1.22$ ,  $SE = .22$ ,  $p < .01$ ; team  $d = -.58$ ,  $SE = .22$ ,  $p < .01$ ) and leader under-identification (dyadic  $d = -.60$ ,  $SE = .22$ ,  $p < .01$ ; team  $d = -.59$ ,  $SE = .23$ ,  $p = .01$ ) and

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significant differences between follower identity congruence and leader over-identification (dyadic  $d = -1.37$ ,  $SE = .23$ ,  $p < .01$ ; team  $d = -.50$ ,  $SE = .22$ ,  $p = .02$ ) and leader under-identification (dyadic  $d = -.75$ ,  $SE = .23$ ,  $p < .01$ ; team  $d = -.51$ ,  $SE = .23$ ,  $p = .03$ ). Second, we combined the types of congruence (leader and follower identity congruence) and the types of incongruence (leader over-identification and under-identification) and compared the mean levels of hindrance stress appraisals of those two groups. Specifically, we found a significant difference in mean levels of hindrance stress appraisals between identity congruence and incongruence such that identity incongruence led to higher levels of hindrance stress appraisals (dyadic  $d = .99$ ,  $SE = .16$ ,  $p < .01$ ; team  $d = .55$ ,  $SE = .16$ ,  $p < .01$ ). Therefore, Hypothesis 1a was supported.

For Hypothesis 1b, we tested our predictions using the same two methods as Hypothesis 1a but we examined the mean differences in levels of challenge stress appraisals and found partial support for our hypothesis (see Tables 4-5). Specifically, we found significant mean differences in the level of challenge stress appraisals: between leader identity congruence and leader over-identification (dyadic  $d = .31$ ,  $SE = .11$ ,  $p < .01$ ; team  $d = .26$ ,  $SE = .12$ ,  $p = .03$ ) and between follower identity congruence and leader under-identification (dyadic  $d = -.27$ ,  $SE = .11$ ,  $p = .02$ ; team  $d = -.26$ ,  $SE = .11$ ,  $p = .02$ ). However, the mean differences in challenge stress appraisals between leader identity congruence and leader under-identification (dyadic  $d = .03$ ,  $SE = .11$ ,  $p = .82$ ; team  $d = -.01$ ,  $SE = .12$ ,  $p = .91$ ) and between follower identity congruence and leader over-identification (dyadic  $d = .02$ ,  $SE = .11$ ,  $p = .89$ ; team  $d = .02$ ,  $SE = .11$ ,  $p = .87$ ) were not significant. Interestingly, when we combined the groups with congruent and incongruent self- and other-identification as we did for Hypothesis 1b, we did not find a significant difference in the mean levels of challenge stress appraisals between identity congruence and incongruence (dyadic  $d = -.03$ ,  $SE = .08$ ,  $p = .77$ ; team  $d = -.01$ ,  $SE = .08$ ,  $p = .94$ ). Thus, Hypothesis 1b was

partially supported.

Hypothesis 3 predicts that leader over-identification is more positively associated with hindrance stress appraisals than leader under-identification. We tested this hypothesis by comparing the mean level of hindrance stress appraisals of participants in the cell reflecting leader over-identification (self-identification: leader, other-identification: follower) with those of participants in the cell reflecting leader under-identification (self-identification: follower, other-identification: leader). In partial support of Hypothesis 3, participants in the leader over-identification cell reported significantly higher levels of hindrance stress appraisals than participants in the leader under-identification cell for dyadic other-identification ( $d = .62$ ,  $SE = .23$ ,  $p < .01$ ), but not for team other-identification ( $d = .004$ ,  $SE = .23$ ,  $p = .99$ ) (see Tables 4-5).

Finally, we tested Hypothesis 5 which predicts that, relative to follower identity congruence, leader identity congruence is more strongly associated with challenge stress appraisals. We compared the level of challenge stress appraisals of participants in the cells reflecting leader identity congruence (self-identification: leader, other-identification: leader) with those of participants in the cells reflecting follower identity congruence (self-identification: follower, other-identification: follower). Participants in the leader identity congruence cells reported significantly higher levels of challenge stress appraisals than participants in the follower identity congruence cells (dyadic  $d = .30$ ,  $SE = .11$ ,  $p = .01$ ; team  $d = .25$ ,  $SE = .11$ ,  $p = .03$ ), fully supporting Hypothesis 5.

## **Study 2 Discussion**

Using a controlled experiment, we found that identity incongruence, particularly leader over-identification, led to higher hindrance stress appraisals levels than leader or follower identity congruence. With regard to challenge stress appraisals, we found that being identified as

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a leader by others, regardless of self-identification as a leader or follower, led to higher levels of challenge stress appraisals. Said differently, in this study, other-identification as a leader seemed to be more influential than self-identification to participants' challenge stress appraisal levels.

### **General Discussion**

Although the existing literature hints at the potential for incongruence between individuals' self-identification as a leader or follower and how others identify them, the individual-level implications of (in)congruence in self- versus other-identification have not been sufficiently explored. The present research uses a multi-study, multi-method approach to extend our understanding of leader and follower identities (DeRue & Ashford, 2010) by examining how different forms of identity (in)congruence predict in-role performance via challenge and hindrance stress appraisals.

Our results are largely consistent across studies. Study 1, a field study using a sample of coworker dyads, revealed a negative indirect association between identity incongruence and performance via hindrance stress appraisals and a positive indirect association between identity congruence and performance via challenge stress appraisals. These effects are stronger for leader over- (versus under-) identification and for leader (versus follower) identity congruence and fully support our hypotheses. Our analyses revealed medium, significant effect sizes across each stage of our model (see Table 3; Cohen, 1988). Supplemental analyses revealed the Study 1 findings are also robust to an alternative measure of self-identification. Study 2, a controlled experiment, revealed a significant negative association between identity incongruence and hindrance stress appraisals and a moderate effect size ( $\eta^2 = .10$ ; Cohen, 1988). As with Study 1, these effects are stronger for leader over- versus under-identification when other-identification is conceptualized at the dyadic level, (although not when other-identification is conceptualized at the team level).

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When we examined the comparison of the conditions on challenge stress appraisals, we found a small effect size ( $\eta^2 = .04$ ; Cohen, 1988). We further found that identity congruence is more positively associated with challenge stress appraisals than incongruence, although support for this relationship was dependent on whether we examined the different forms of (in)congruence were tested separately (not supported) or together (supported). In addition, our results in Studies 1 and 2 showed that the positive relationship between identity congruence and challenge stress appraisals are stronger for leader (versus follower) identity congruence.

### **Theoretical Implications**

Our findings make several important theoretical contributions. This study is one of the first to show that incongruence frequently occurs between individual's personally-held identity as a leader or follower and how others identify them. Across both studies, we find that such leader identity incongruence can have significant implications for individuals, particularly through hindrance stress appraisals and performance. As such, our work suggests that leadership theories could benefit from incorporating a less consensual view of leader and follower identities, and exploring the individual and team-level implications of identity incongruence.

Another contribution of the present research is to the broader identity literature by offering a more nuanced and social view of identity congruence and incongruence. Prior research has tended to focus on within-person identity conflicts (e.g., an individual could experience conflict between their leader identity and their identity as a parent), and assumed that all types of identity discrepancies are appraised in a similar manner. Our results demonstrate the identity conflicts can also occur between people, or between people and teams, unlocking these between-person conflicts for future theorizing and investigation. Moreover, we show that there are important differences between the performance implications of different types of leader identity

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congruence and incongruence. Across both studies, we find leader identity congruence is more beneficial for individuals than follower identity congruence, and leader over-identification is more detrimental than leader under-identification.

Finally, the present research contributes to the literature by leveraging stress appraisal theory to explain why and how different forms of leader identity (in)congruence are appraised as different types of stressors, and the resulting performance implications. Although prior research has hinted that identity conflicts may be perceived as stressful (i.e., Meister et al., 2014; Petriglieri, 2011), we differentiate between challenge and hindrance stress appraisals and link specific types of identity (in)congruence to specific appraisals. Our finding that *leader identity congruence*, even more so than follower identity congruence, can prompt a challenge stress appraisal builds on prior work that suggests being identified as a leader can be stressful (Lin et al., 2019) by highlighting how this stress can be a motivating opportunity for growth and development. Our findings pertaining to the benefits of leader identity congruence are consistent with research on the Pygmalion effect, which show that high expectations from others can boost performance (Eden, 1990).

### **Practical Implications**

We offer two suggestions for organizations seeking to reduce the disruption and increase the benefits of leader identity-related stress appraisals. First, when selecting individuals to participate in leader development initiatives, it may be valuable to consider not only individuals' skills and formal position within the organization, but also whether individuals identify and are identified by others as leaders. Individuals who see themselves as leaders but are not granted leader identity by other(s) as such will likely appraise this situation as a hindrance stressor. However, our findings further suggest that individuals who see themselves as leaders *and* are

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endorsed as a leader by their coworker or team will likely appraise this situation as a challenge stressor and therefore be motivated by the opportunity and more likely to achieve even higher levels of performance. If organizations still want to engage the former in leader development training (because of the other benefits associated with such training), it could be beneficial to provide extra support to help them to cope with increased stress in the short term.

Second, managers can take steps to reduce the magnitude and salience of any leader identity incongruences that they notice. For example, work on discrepancy in organizational identities suggests that reduced ambiguity on what an identity is or should be can reduce incongruence (Corley & Gioia, 2004). Similarly, scholars have found that generating increased sensitivity to the discrepancy can more fully motivate individuals to quickly resolve it so it is not as stressful (cf. Lund Dean & Jolly, 2012). Managers who are able to provide clarity to their team members about whether a particular team member should view themselves as a team leader or follower might therefore help reduce identity incongruence and its corresponding hindrance stress appraisals. Such clarity could also generate identity congruence and its corresponding challenge stress appraisal, which may ultimately benefit performance.

### **Strengths, Limitations and Future Directions**

The present research has several notable strengths. Study 1 established the robustness of our findings across alternative measurement approaches using dyadic-identification and provided evidence that stress appraisals transmit the effects of identity (in)congruence to performance. Study 2 ascertained the similarity between both types of other-identification (dyadic and team) and causal inference using a controlled experiment design. The designs of both studies are complementary, such that the strengths of one offset the limitations of the other. As such, we are confident that when considered as a package, the studies reported in this article offer strong

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evidence in support of our theorized relationships.

However, as with any research, the studies reported here are subject to certain limitations, which suggest avenues for future inquiry. In both studies, we took a between-person approach to examine the relationship between identity (in)congruence to in-role performance through stress appraisals which could allow stable individual differences to influence our results. For example, prior work has suggested there may be gender differences in self-identification (Sturm et al., 2014) and other-identification (Paustian-Underdahl et al., 2014; Van Velsor et al., 1993). When we included gender as a control in Studies 1 and 2, it did not affect the significance of our results, but future research exploring gender and other individual differences as predictors of leader identity (in)congruence would be valuable. Another limitation is the potential for reverse causality in our model, although we used time separation between our model variables in Study 1 to minimize this effect (Podsakoff et al., 2012). In addition, prior research suggests that stress appraisals lead to performance rather than the opposite relationship (e.g., LePine et al., 2016). Study 2 also helps ease the concern of causality by using a controlled experimental design of the first path (identity (in)congruence on stress appraisals). However, additional research on causality in the entire model would be useful.

The choice of measures in both studies could also be considered a limitation. Our measure of self- and other-identification as a leader or follower was not originally validated through the peer review process (Lee et al., 2016). Supplemental analyses revealed that our results were consistent across an alternative measure of self- and other-identification as a leader or follower but future research could conduct rigorous validation of both measures to complement future research. Additionally, our measure of challenge and hindrance appraisal was adapted to be specific to leadership (cf. Bartels et al., 2022) to align with the reference to leader

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identity in our other measures. However, this approach could have rendered the measure more relevant to people who identified as leaders versus followers, and it would be helpful for future research to experiment with other approaches to assessing leadership-specific stress appraisals.

Our studies are designed to complement each other, but there are several aspects of our work that could be further explored in subsequent research. Using a within-person design could not only examine the dynamics of identity congruence, but also the trajectory of identity construction over time. As such, future research using growth modeling to explore temporal dynamics in leader identity construction theory would constitute a valuable extension.

Additionally, although our theorizing emphasizes that the effects of leader identity (in)congruence are driven by identity-consistent claiming and granting behaviors, we stopped short of measuring these behaviors. Scholars could advance our work by creating and validating a taxonomy of observable claims and grants of leader and follower identities and exploring the role of specific behaviors in leader identity construction. Within both studies, we found that challenge stress appraisal levels differ when participants are prompted to focus on other-identification rather than it naturally occurring. Future research could examine whether an intervention, such as a writing intervention, could prompt a positive portrayal of other-identification. Similarly, to better understand other-identification in the team setting, future research could capture identity perceptions from the entire team using social network analysis (Brands, 2013; Wellman, 2017). Finally, given our theoretical focus on informal leadership, we purposefully sampled teams without clear formal leaders. This decision was appropriate for an initial examination of leader identity incongruence. However, given formal leadership roles can shape informal leader emergence (White et al., 2014), it would therefore be interesting to explore how formal leadership positions influence the relationships we observed in our research.

### **Conclusion**

Across two studies, we find that differences frequently emerge between the extent to which individuals identify as a leader or follower and the extent to which they are viewed as a leader or follower by others. These different forms of leader identity (in)congruence have different and significant associations with individuals' stress appraisals and performance. We hope our findings will lead scholars to reconsider the assumption that the members of teams always arrive at a stable and agreed-upon set of leader identities and to continue to explore the experience of such identity (in)congruence. Doing so could unlock several important and interesting new lines of inquiry related to the process through which individuals come to see themselves (and others) as influential informal leaders.

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**Table 1**

*Descriptive Statistics and Correlations for Study 1*

	Mean	Std. Dev.	1	2	3	4	5	6
<i>Control variables</i>								
1. Opportunity to observe	4.52	0.67	*					
2. Coworker-member exchange	4.49	0.57	.64*	*				
<i>Model variables</i>								
3. Other-identification	4.24	0.83	.23*	.21*	*			
4. Self-identification	4.30	0.71	.43*	.57*	.35*	*		
5. Hindrance stress appraisals	3.82	1.36	.14*	.25*	.30*	.08*	*	
6. Challenge stress appraisals	2.68	1.08	-.03	-.10	-.18*	-.10*	-.50*	*
7. In-role performance	4.12	1.19	.07	.15*	-.04	.13	-.19*	.28*

Note.  $N = 226$  dyads, between-person correlations.  $*p < .05$

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**Table 2**

*Frequencies of Forms of Identity (In)Congruence for Study 1*

<b>Type of (in)congruence</b>	Percentage
Leader over-identification	11.9%
Leader/Follower identity congruence	67.3%
Leader under-identification	20.9%

*Note:* The percentages indicate the portion of the sample that had a standardized score that is half of a standard deviation above (i.e., leader over-identification) and below (i.e., leader under-identification) the standardized score as well as the percentage of participants that are “in agreement” (leader/follower congruence) (Shanock et al., 2010).

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**Table 3**

*Polynomial Regression Results for Study 1*

Variables	<u>Hindrance Stress Appraisal</u>		<u>Challenge Stress Appraisal</u>		<u>In-Role Performance</u>	
	Estimate	SE	Estimate	SE	Estimate	SE
<i>Polynomial terms</i>						
b <sub>1</sub> Other-identification (O)	1.31*	0.61	0.95	0.69		
b <sub>2</sub> Self-identification (S)	-1.82**	0.70	1.30	0.83		
b <sub>3</sub> O <sup>2</sup>	-0.02	0.08	-0.18**	0.07		
b <sub>4</sub> O × S	-0.16	0.11	-0.01	0.12		
b <sub>5</sub> S <sup>2</sup>	0.27*	0.13	-0.16	0.15		
<i>Congruence line (O = S)</i>						
Slope (b <sub>1</sub> + b <sub>2</sub> )	-0.52	0.48	2.25**	0.47		
Curvature (b <sub>3</sub> + b <sub>4</sub> + b <sub>5</sub> )	0.09	0.07	-0.35**	0.06		
<i>Incongruence line (O = -S)</i>						
Slope (b <sub>1</sub> - b <sub>2</sub> )	-3.13**	1.21	0.35	1.46		
Curvature (b <sub>3</sub> - b <sub>4</sub> + b <sub>5</sub> )	0.41**	0.15	-0.32*	0.13		
Hindrance Stress Appraisal					-0.11*	0.06
Challenge Stress Appraisal					0.26**	0.08
R-squared	0.16**	0.05	0.13**	0.04	0.12**	0.04

Note. N = 226 dyads

\*  $p < .05$ ; \*\*  $p < .01$

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**Table 4**

*Results for Hindrance Stress Appraisals in Study 2*

		Mean	Mean Difference		Comparison of Congruence	Comparison of Incongruence
			Vs. Condition 3	Vs. Condition 4		
<b>Condition 1</b>	High Self-Identification x High Dyadic-Identification	4.47	-1.21*	-.60*	0.15	
<b>Condition 2</b>	Low Self-Identification x Low Dyadic-Identification	4.18	-1.36*	-.75*		
<b>Condition 3</b>	High Self-Identification x Low Dyadic-Identification	4.16				.61*
<b>Condition 4</b>	Low Self-Identification x High Dyadic-Identification	4.45				

		Mean	Mean Difference		Comparison of Congruence	Comparison of Incongruence
			Vs. Condition 7	Vs. Condition 8		
<b>Condition 5</b>	High Self-Identification x High Team-Identification	4.4	-.58*	-.59*	-0.08	
<b>Condition 6</b>	Low Self-Identification x Low Team-Identification	4.15	-.50*	-.51*		
<b>Condition 7</b>	High Self-Identification x Low Team-Identification	4.13				-0.004
<b>Condition 8</b>	Low Self-Identification x High Team-Identification	4.41				

Partial  $\eta^2 = .10$ ; Significance levels of the mean differences were tested using post hoc pairwise comparisons; \*  $p < .05$

H1a: For dyadic-identification, we compared Condition 1 with Conditions 3 and 4 and Condition 2 with Conditions 3 and 4. For team-identification, we compared Condition 5 with Conditions 7 and 8 and Condition 6 with Conditions 7 and 8.

H3: For dyadic-identification, we compared Condition 3 with Condition 4. For team-identification, we compared Condition 7 with Condition 8.

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**Table 5**

*Results for Challenge Stress Appraisals in Study 2*

		Mean	Mean Difference		Comparison of Congruence	Comparison of Incongruence
			Vs. Condition 3	Vs. Condition 4	Vs. Condition 2	Vs. Condition 4
<b>Condition 1</b>	High Self-Identification x High Dyadic-Identification	4.47	.31*	0.03	.30*	
<b>Condition 2</b>	Low Self-Identification x Low Dyadic-Identification	4.18	0.02	-.27*		
<b>Condition 3</b>	High Self-Identification x Low Dyadic-Identification	4.16				-.29*
<b>Condition 4</b>	Low Self-Identification x High Dyadic-Identification	4.45				

		Mean	Mean Difference		Comparison of Congruence	Comparison of Incongruence
			Vs. Condition 7	Vs. Condition 8	Vs. Condition 6	Vs. Condition 8
<b>Condition 5</b>	High Self-Identification x High Team-Identification	4.4	.26*	-0.01	.25*	
<b>Condition 6</b>	Low Self-Identification x Low Team-Identification	4.15	0.02	-.26*		
<b>Condition 7</b>	High Self-Identification x Low Team-Identification	4.13				-.28*
<b>Condition 8</b>	Low Self-Identification x High Team-Identification	4.41				

Partial  $\eta^2 = .04$ ; Significance levels of the mean differences were tested using post hoc pairwise comparisons; \*  $p < .05$

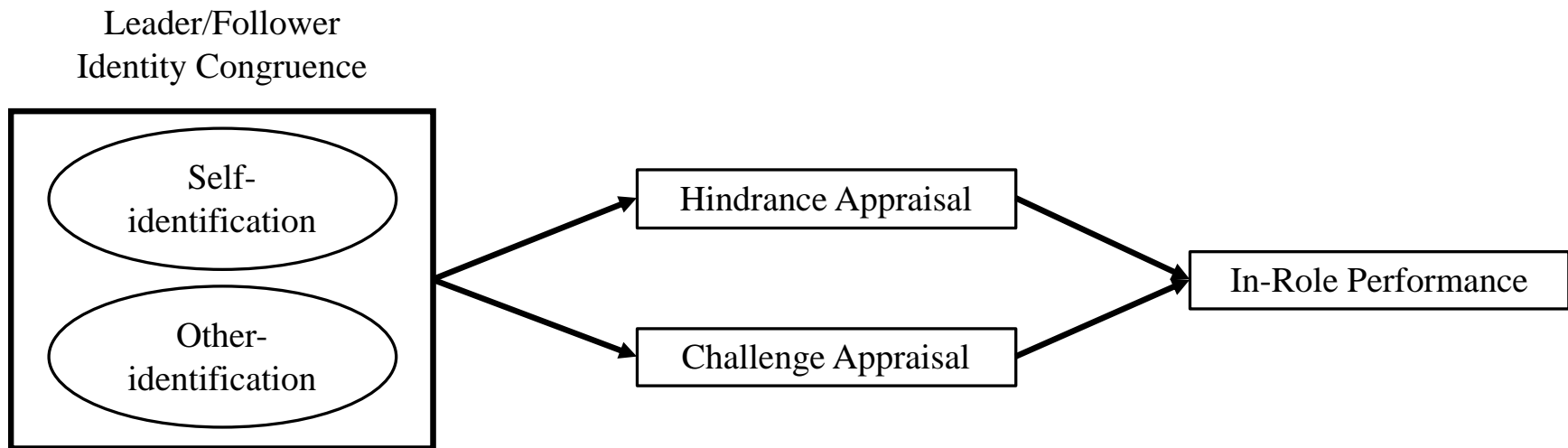
H1b: For dyadic-identification, we compared Condition 1 with Conditions 3 and 4 and Condition 2 with Conditions 3 and 4. For team-identification, we compared Condition 5 with Conditions 7 and 8 and Condition 6 with Conditions 7 and 8.

H5: For dyadic-identification, we compared Condition 1 with Condition 2. For team-identification, we compared Condition 5 with Condition 6.

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**Figure 1**

*Summary of Conceptual Model*



**Figure 2**

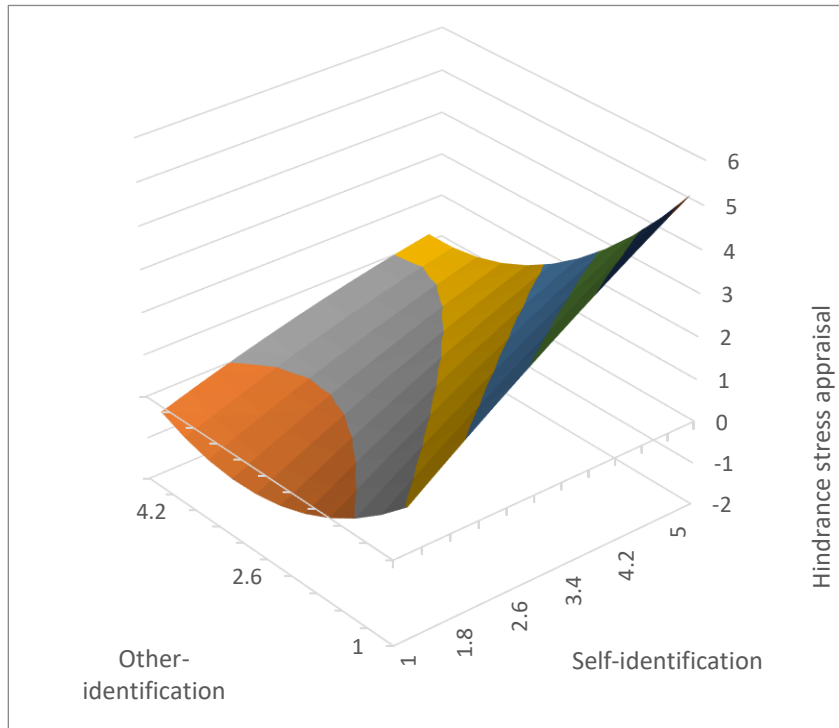
*A Taxonomy of Leader Identity (In)congruence*

		<b>Self-Identification</b>	
		<b>Leader</b>	<b>Follower</b>
<b>Other-Identification</b>	<b>Leader</b>	<p><i>Leader Identity Congruence</i> Individuals' goals of engaging in leadership are supported and encouraged by others who affirm their leader identity. Results in high challenge stress appraisals due to the risks and demands associated with leadership. <i>(Quadrant 1)</i></p>	<p><i>Leader Under-Identification</i> Individuals may be distracted from their non-leadership aspirations due to others encouraging them to assume leadership responsibilities. Results in moderate hindrance stress appraisals because goals of individuals with a follower identity are less likely to depend on endorsement of others. <i>(Quadrant 3)</i></p>
	<b>Follower</b>	<p><i>Leader Over-Identification</i> Individuals' personal leadership goals are thwarted by others who view them as a follower and either do not support their leadership attempts or deliberately exclude them from leadership opportunities. Results in high hindrance stress appraisals due to inability to achieve desired outcomes due to lack of support. <i>(Quadrant 4)</i></p>	<p><i>Follower Identity Congruence</i> Individuals' follower identity reinforced by "grants" of followership from others. Produces a moderate level of challenge stress appraisals because goals related to follower identity are easier to accomplish and less dependent on others. <i>(Quadrant 2)</i></p>

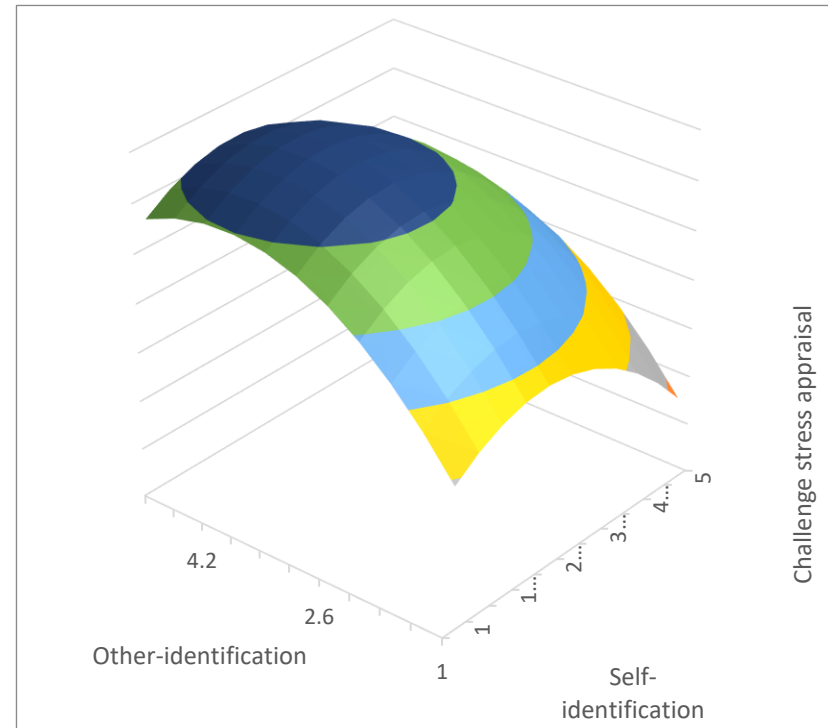
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**Figure 3.**

*Response Surface Plots for Study 1*



**Figure 3a.** Incongruence between self-identification and other-identification as a leader predicting hindrance stress appraisals

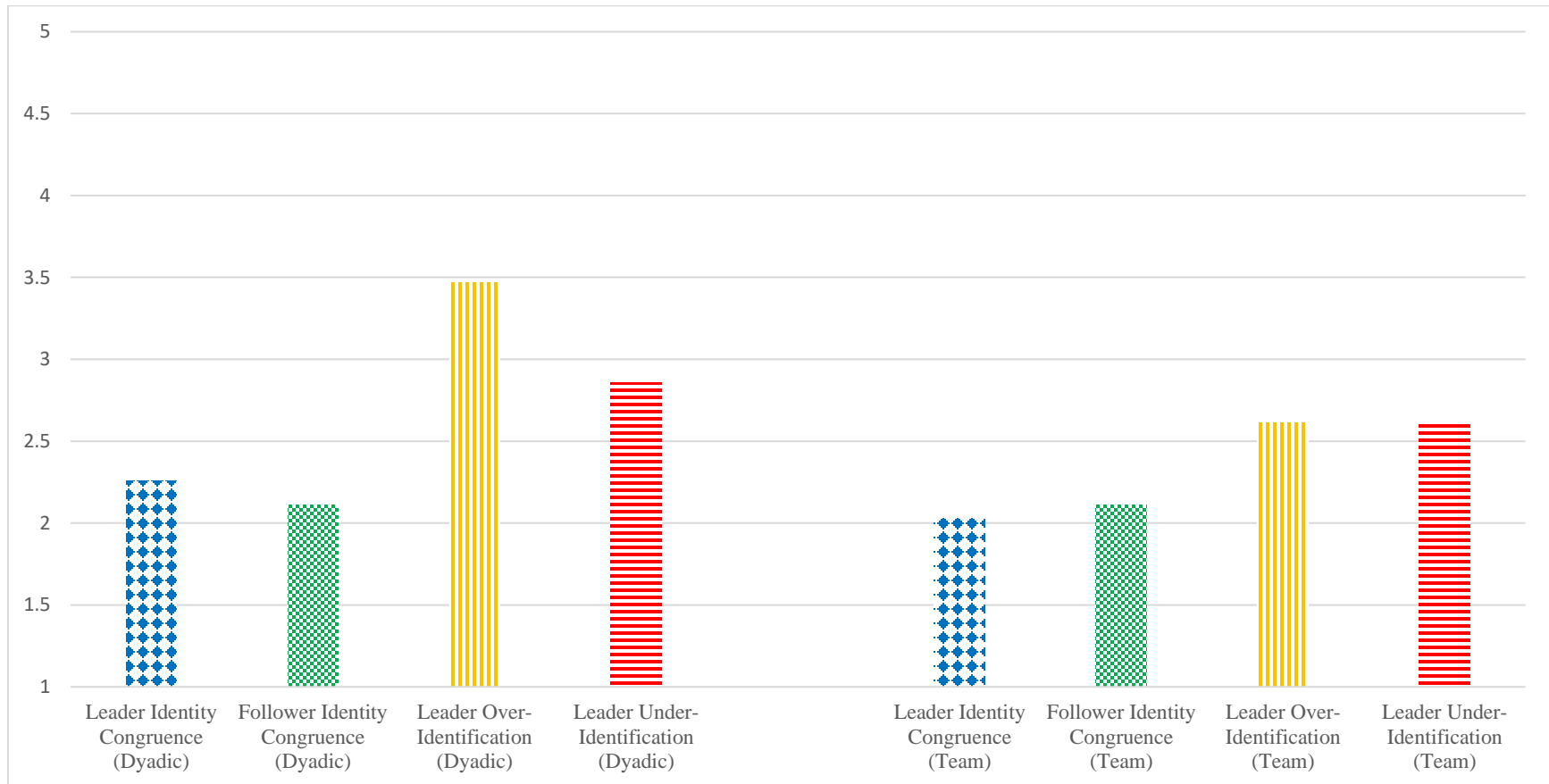


**Figure 3b.** Incongruence between self-identification and other-identification as a leader predicting challenge stress appraisals

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**Figure 4**

*Mean Comparison of Hindrance Stress Appraisals for Study 2*



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**Figure 5**

*Mean Comparison of Challenge Stress Appraisals for Study 2*

