

Servant as leader: Critical requirements for the appointment and training of retirement fund trustees



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Orientation: The South African retirement fund industry ranks among the 15 largest retirement fund industries internationally, with some 8 million members and assets under management of close to R2 trillion. However, to be successful, retirement funds need good governance.

Research purpose: To explore the most critical servant leadership qualities required that can serve as profile in the selection, appointment and training of retirement fund trustees (RFTs) to serve on boards of trustees of retirement funds in the South African context.

Motivation for the study: The South African National Treasury's retirement reform proposal clearly articulates government's concern for the poor governance of retirement fund assets by appointed boards of trustees and the broader implications on social and economic security in retirement. It promotes the regulation of standards relating to the minimum qualifications and expertise needed to be appointed to serve on a board of trustees (BoTs). Although the measures proposed by government to improve fund governance and the role of the RFTs are sound in principle, it does not inform the character, leadership qualities or leadership competence desired for RFTs, thus leaving the management of funds in the hands of people who must make investment decisions when they themselves are not fully committed.

Research design, approach and method: The research question was addressed through an extensive literature review and a qualitative methodology using a semi-structured interview; fieldwork that included personal observations; and notes with six active, high-profile, respected, purposefully selected RFTs. An interpretive approach was adopted to provide elaborative interpretations of phenomena without having to rely on numerical measurement.

Main findings: A strong similitude exists between servant leader qualities, as found in the literature, and those qualities identified and required to be appointed as a RFT. Literature findings support that limitations impacting on good retirement fund governance are (1) lack of knowledge, (2) lack of experience, (3) independence and (4) lack of capacity of RFTs. Legislative and regulatory framework changed in recent years, resulting in an increased complexity in managing the affairs of retirement funds. A great need for qualified and skilled RFTs was expressed.

Practical and managerial implications: Servant leadership qualities proved useful to profile and aid the selection, appointment and training of RFTs in a meaningful way, thereby benefiting the broader South African retirement fund industry and social welfare of all South Africans. The importance of the role human resources practitioners can play to aid their employees to correctly select and appoint a RFT cannot be emphasised enough.

Contribution: The many practical contributions of the study were evident from the real and tangible outcomes of using a servant leader's profile to select, appoint and train prospective RFTs to serve on the BoTs of pension funds, to ensure that social justice is upheld for those members of society who cannot protect themselves.

Introduction

The Financial Services Board (FSB) in South Africa is the appointed regulator of non-banking financial services, ensuring also that all entities comply with applicable legislation, including the *Pensions Fund Act* (No. 24 of 1956). The Office of the Registrar of Pension Funds acts as supervisor of the retirement fund industry. Each fund must appoint a management team to serve on the board of trustees (BoTs) consisting of at least four members. One such member, the retirement fund trustee (RFT), must be elected and appointed by the members (normally employees) to assist with the management and the investment asset for the benefit of the retirement fund members. This must be done in the context of the applicable laws and rules of the specific fund.

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The challenge in the South African retirement fund industry today is that there is little to no regulatory guidelines for the selection of the RFTs to office, because there are no formal qualifications or guidelines, except for willingness, needed to serve as an RFT. However, any person who can basically understand the requirements of the *Pensions Fund Act* can be an RFT. Only the rules of a fund can disqualify a person from being an RFT and only if that person is guilty of having a criminal record, misused funds, committed fraud or has been found guilty of dishonesty or theft.

Therefore, the problem is that without an understanding of the qualities necessary to serve as RFTs, and a profile to guide the selection of RFTs, persons not qualified to serve their members' best interests will continue to be selected and appointed to serve on the BoTs of a pension fund (PF), not fully comprehending the full extent of the responsibility placed upon them. The research question the researchers ask is to what extent the qualities ascribed to a servant leader can assist in the selection, profiling and training of RFTs. This study aims therefore to analyse the nature of a servant leader as proposed by the literature, as well as to draw on the key learnings and profile of a servant leader to determine if servant leader qualities can be used as an aid in the selection of RFTs in South Africa.

Purpose

The purpose of this study was to understand the most critical servant leader qualities that can serve as an aid in the profiling, selection, appointment and training of RFTs to serve on boards of trustees of PFs.

Literature review

The literature review first unpacks the challenges experienced in the PF industry and then explores current rules and regulations governing the selection and appointment of RFTs to the boards of trustees. The third section explores relevant theory with regard to the servant leader.

The challenges in the PF industry include the following: Assets of PFs are managed on behalf of its members by BoTs for the main purpose of providing the benefits promised to its members in terms of the registered rules of the fund. Legislation, in the form of Section 7(a) of the *Pensions Fund Act* of 1956, provides for the election of individuals to the office of BoTs. The potential threat faced by funds because of the lack of abilities and skills and ineffectiveness of certain BoTs has been highlighted in recent judgements by the courts, for example, in the case of *Smith vs. Dantex, South Africa (Pty) Ltd.*, where the applicant was not satisfied with the Section 37(c) death benefit distribution and contested it. The RFTs had agreed to initially withhold payment until the dispute was resolved, but later retracted their commitment to do so. An interdict was granted preventing the RFTs from paying out the benefit to allow the applicant's complaint to be reviewed before proceeding with the review of the decision. The court found that the RFTs, in the reasonable

exercise of their duties, ought to have been aware that the law provides for further adjudication of their decisions. The court further held that the RFTs should have been more astute in preserving the rights and interests of the claimant and held that the RFTs not only acted negligently but also grossly unreasonable. The RFTs were in this matter ordered to pay the applicant's costs.

In addressing the Cosatu Labour RFTs at their annual conference, the Pension Fund Adjudicator (Ngalwana, 2005) stated:

I believe the reason South Africans retire with insufficient savings is that we as trustees do not exercise our fiduciary duties. Perhaps it is because we do not know what they entail. (ILL Wind for Institutions, 2005, n.p.)

The above statement by Ngalwana (2005) is reiterated by Nevondwe (2013) who argues that the trustees' duties should be linked with the duties of directors under the new *Companies Act* and the King III report. In the Registrar of Pension Funds Annual Report 2007, specific reference was made to irregularities being the direct result of the failure of PFs to appoint properly constituted BoTs. The Registrar of Pension Funds Annual Report 2009 identified the main challenges of the retirement fund industry as follows: RFTs not displaying proper stewardship in managing the retirement assets, and retirement funds not having properly constituted BoTs and therefore having taken invalid decisions in many regards. The reader needs to be reminded that members (employees) appoint their RFTs, and as Nel (2014) pointed out, the apathy showed by members of a PF further complicates the issue. He further reports that the majority of members solely rely on their trustees to make the right investment decision for them – little to no interest is shown by employees to really elect these trustees who will represent their pension interest on their behalf.

The New Complaints Unit (NCU) is the entry point for complaints against PFs at the Office of the Pension Funds Adjudicator (OPFA), and statistical data researched suggested an increase in the number of new complaints by members against their RFTs. Complaints increased from 2387 in the period 2004–2005 to 10 254 in the period 2007–2008. New complaints in the period 2008–2011 remained around an estimated 6000 complaints per annum. Minister of Finance, Nhlanhla Nene in his introduction to the Pension Fund Adjudicator Annual Report (2015) expressed his concern that the number of complaints raised almost 30% during the 2014–2015 financial year. However, he optimistically pointed out that an increase in level of service and quality of work was noticeable.

Rules and regulations to select and appoint a retirement fund trustee to serve on boards of trustees

The *Pensions Fund Act* (1956) states that BoTs of PFs must comprise at least four RFTs. By way of application, the

Registrar of Pension Funds may allow fewer than four RFTs if it can be shown that it is impractical or unreasonably expensive to have four RFTs. The *Pensions Fund Act* (1956) further states that members of a fund have the right to elect at least 50% of the members of BoTs. It is significant to note that although the Act stipulates the requirement that PFs must have BoTs, the Act does not refer to or specify any qualities, skills, qualifications or requirements an individual should possess in order to be appointed to the office of BoTs. Yet, BoTs are legally obligated to manage and oversee the fund's contribution payments, financial and other records, assets, compliance with the fund rules and the legislative framework and protect members' and beneficiaries' interests. This implies a gross loophole as practically any person who is willing may be elected by its members.

In this regard, the *Pensions Fund Act* could be more onerous and prescriptive in respect of the qualities, skills and qualifications an individual should possess to serve as an RFT. People without character elected or appointed to a BoT are unlikely to act in accordance with the rules of the fund and are likely to abuse their powers to serve their own interest. These people will find it difficult to act prudently, responsibly, honestly and impartially, to take into account all the relevant facts and to ask for professional advice if necessary.

As such it is postulated here that the servant as leader qualities as an approach might enrich elected or appointed RFTs to serve on boards of trustees for the greater good of the society at large.

Servant leadership

The term 'servant leader' cannot be discussed without reference to its initiator, Robert K. Greenleaf, as cited in the works of authors such as Freeman (2011), Hayden (2011), Parolini (2005), Patterson (2003), Russell and Stone (2002) and Sendjaya, Sarros and Santora (2008).

However, upon consulting the original work of Greenleaf (1970), one realises how his original work is diluted by the work of other authors. His name is mentioned almost in passing. Without disregarding the importance and contributions of other authors' work, this article will first revert back to Greenleaf's original work. Greenleaf acknowledged that the original idea of the servant as leader came from an earlier work he had read, Hermann Hesse's *Journey to the East*, 11 years before his own essay was written and published. The story is about Leo, the servant, and how he served his masters during their travels. Most of all, Leo kept them positive by means of his kind spirit and songs. After Leo's disappearance, the group fell in dismay and abandoned their journey. Many years later Leo was found and was in fact a great and noble leader of the Order.

Based on the story above, Greenleaf theorises that leadership is first bestowed on a person who is a servant by nature. Secondly, servants as leaders must regularly do introspection,

contemplating how best they can apply themselves to serve best. He further argues that leaders can only bring about trust if there is confidence in their judgement and values, if they are accepting people for whom they are and if they are adopting an ethos that will support the common goal for the good of all. Greenleaf attributes also the following highly valued characteristics to a servant as leader: (1) listening skills – the servant as leader acknowledges what was heard and what can be done about something, without attempting to put the blame on someone else; (2) having beyond conscious rationality the upfront ability to see and know what others fail to see and know. Greenleaf states this as a distinguishing point between good and poor leadership. If leaders wait too long before making decisions, not trusting their intuition, different challenges arise and they have to start all over again. The person who is better at making a decision will most likely surface as a leader. He refers to the leader's failure of foresight as an ethical failure, because failure to see the consequence of one's actions in the future is failure to act in time, when there is still freedom to act constructively; (3) awareness; (4) persuasion (one person at a time); (5) authentic to oneself; (6) conceptual leadership (seeing what people can do for themselves) and (7) building their community.

Role of the trustee

Relevant and most important to this study is Greenleaf's (1970) reference, specifically to the role of *trustees*. These are people in whom trust is placed. He explicitly refers to organisations and the two kinds of leaders needed, inside and outside the organisation. Outside the organisation is when tangible assets such as employees' PFs are involved. The trustees are legally responsible and accountable to all interested parties to govern it to the good use and benefit of all. The role 'of a trustee provides a great opportunity for those who would serve and lead' (Greenleaf, 1970, p. 23). Thus, elected and appointed trustees are to serve the people for the common good and should be held accountable for their actions. PF have become so large (Hunter, 2002, p. 1), they became the 'personal fiefdoms of their principal officers' and organisations seldom question the excessive administrative expenses incurred. PF are open for personal abuse by the staff and officials appointed, and some funds outsource the management of funds of which their trustees and senior management are shareholders.

Cited in the work of Freeman (2011), four conceptual servant-as-leader organisation models (Parolini, 2005; Russell & Stone, 2002; Wong & Page, 2003) and two servant-as-leader follower models (Patterson, 2003; Winston, 2003) were discussed. Seven instruments to measure servant leadership (Barbuda & Wheeler, 2006; Dennis & Bocarnes, 2005; Dennis & Wintston, 2003; Laub, 2003; Linden, Wayne, Zhao & Henderson, 2008; Sendjaya et al., 2008) were developed and validated. However, none of the conceptual models or measurement instruments above contributed or alluded to the role of the trustee as a servant as leader per se. Table 1 portrays a summary of some of the empirical work

TABLE 1: Servant-as-leader measuring instruments.

Author	Number of items	Emerging factors
Laub (2004): Organisational Leadership Assessment	66 item	Organisational level Top leadership level Individual level Covers six areas: <ul style="list-style-type: none"> • Valuating people • Developing people building community • Displaying authenticity • Providing leadership • Sharing leadership
Sendjaya et al. (2008): Servant Leadership Behavioural Scale	35 item scale	Six dimensions: <ul style="list-style-type: none"> • Voluntary subordination • Authentic self • Covenantal relationship • Responsible morality • Transcendental spirituality • Transforming influence
Dennis and Winston (2003): Measured Page and Wong's (2000) conceptual model	99-item scale	Three factors emerged: <ul style="list-style-type: none"> • Empowerment • Service • Vision
Dennis and Bocarnea (2005): Measured Patterson's (2003) conceptual model	Three separated data collections to reduce 71-item scale to 42-item scale	Five factors emerged: <ul style="list-style-type: none"> • Empowerment • Love • Humility • Trust • Vision
Barbuto and Wheeler (2006): Although not explicitly stated it is clear that these 11 dimension stem from Greenleaf (1970)	56-item scale	Eleven dimensions: <ul style="list-style-type: none"> • Calling • Foresight • Growth • Empathy • Awareness • Conceptualisation • Stewardship • Listening • Healing • Persuasion • Community building Five factors emerged: <ul style="list-style-type: none"> • Altruistic calling • Emotional healing • Persuasive mapping • Wisdom • Organisational stewardship
Liden et al. (2008)	28-item scale	Nine dimensions – Seven factors emerged: <ul style="list-style-type: none"> • Controlling for transformational leadership and leadership-member exchange (LMX)
Van Dierendonck and Nuijtgeb (2010)	Servant leadership survey	Eight Dimensions: <ul style="list-style-type: none"> • Empowerment • Accountability • Standing back • Humility • Authenticity • Courage • Interpersonal acceptance or stewardship

Source: Adopted from Freeman, G. (2011). Spirituality and servant leadership: A conceptual model and research proposal. *Emerging Leadership Journal*, 4(1), 120–140

done in terms of servants as leaders. Although there are similarities between the works of the authors above, it is evident that they each attempted to establish their own accord of what is understood by a servant as leader. It is acknowledged that the work presented by the authors above

enriched the existing body of knowledge relating to the servant-as-leader field. However, without knowing what is really required, the administration of these instruments would serve little to no purpose in the selection, appointment and training of RFTs.

Hayden (2011) undertook research to test not only Greenleaf's (1970) original intended theory but also the impact on followers. He used Barbuto and Wheeler's (2006) five dimensions (1) altruistic calling, (2) emotional healing, (3) wisdom, (4) persuasive mapping and (5) organisational stewardship, after subjecting the original 11 dimensions as postulated by Greenleaf (1970) in his original essay for analysis. Hayden's study validates Greenleaf's claim that servant leadership would have an effect on followers and that the motive for the servant leaders is therefore the calling to serve. It can be argued here that RFTs answer to such a calling as they are normally people who make themselves available to be elected to serve the interest of their fellow employees.

Servant leadership is not limited to any particular discipline or community (Sipe & Frick, 2009). It empowers any person(s), depending on their personal abilities and competence, to serve the mission and vision of their particular community. It is a sense of liability and responsibility towards all members of the community to the extent that their lives are guided to greater nobility. Servant leaders are authentic leaders; they have genuine concern and affection for their followers and serve their higher order needs. They serve the less fortunate in their communities before serving their own financial gains or successes. Servant leaders are caring, not manipulative, not exploitative and do not abuse their power for selfishness. Achua and Luccier (2010) explain the nature of SL as leaders that transcend their own personal interests in favour of serving the needs of their followers. SL is a call for self-sacrifice and selflessness at the highest level. These leaders do not lead from a position of power but serve followers through moral influence. Successful SL is therefore dependent on four key principles: 'service to other over self-interest, trust, effective listening, and empowering others to discover their inner strength' (Achua & Luccier, 2010, p. 318). For the purpose of this study, the researchers used Sipe and Frick's (2009) servant leadership framework, because through their construction of the Seven Pillars of Servant leadership, Sipe and Frick (2009) aimed at organising a measurable and competency-based framework for illustrating knowledge, skills, and abilities of SL. It is postulated by them that:

The Seven Pillars of Servant leadership are meant to symbolise and integrate these multiple meanings. Each leadership pillar represents a set of concrete, observable competencies that bear weight and provide structure and support to an organisation's employees, customers, and wider community. They are not merely lovely, abstract ideas, but wise, hard-nosed, and humane ways of being and behaving. (p. 3)

The pillars are (1) person of character, (2) people first, (3) skilled communicator, (4) moral and compassionate collaborator, (5) foresight, (6) a systems thinker and (7) lead with authority. Again, one senses the influence of Greenleaf's (1970) original work. For the purpose of this research, Sipe and Frick's (2009) seven leadership pillars framework was useful to enhance understanding of how a servant as leader may serve in the election and appointment of retirement

fund trustees. Box 1 presents Spears (2010) most recognised SL qualities. These seven pillars and the SL qualities served as stimuli for the semi-structured interviews conducted.

It is postulated that a person who is recognised for having these servant leader qualities, as cited in Spears (2010), and who has a character anchored in the Seven Pillars of Servant leadership (Sipe & Frick, 2009) will conduct themselves as follows:

- serve others as independent moral agents with enhanced moral reasoning
- conduct themselves with care and concern
- create a culture of servant led community that holds at its core, the values of the group
- accepts responsibility for the betterment of the broader community
- serve the needs of others first
- collaborate for shared objectives
- value others and promote a sense of community
- promote shared decision making
- always act with moral courage and integrity.

From the literature above, the researchers concluded that typical leaders would strive to influence their people to work towards achieving a common goal. They would strive to seek inclusivity and to maintain a balance between organisational goals and employee well-being. One can argue that, on the other hand, servant leaders do not seek to build inclusivity in the organisation. They focus on the personal needs of the people or community they serve and place higher emphasis on their well-being. Servant leaders should strive to go beyond what is expected of them and consider the longer term, broader objectives and future impact on the community they serve. In the case of the role of a trustee, it would be the RFT member that serves on the BoTs. Therefore, extensive knowledge of the organisation and environment they operate in is essential if they want to make a difference.

Research approach and methods

Primary data were collected by means of semi-structured interviews and textual analysis was applied. The advantages were that it provided the opportunity for the researchers to discover, interpret and comprehend the perspectives, personal opinions and worldviews of South African role

BOX 1: Qualities of the servant-as-leader.

SL makes ethical and principle-centred decisions. Has integrity and humility and serves a higher purpose
SL develops others, by being mentor-minded, and shows care and concern with a servant's heart
SL is a good listener and communicator. Shows empathy when needed and invites feedback when necessary
SL is relationship-minded, manages conflicts professionally, embraces diversity and creates community
SL is a visionary that acts with courage and is creative in thinking and application
Sense maker of complexity, adaptable and considers the bigger picture for the 'greater good'
Respects others and is respected for sharing power. Is responsible and expects of others to be accountable to

Source: Adapted from Sipe, J.W., & Frick, M.D. (2009). *Seven pillars of servant leadership*. New York: Paulist Press

players involved in the PF industry. Further strengths of the qualitative approach was that it provided high construct validity, deep insights and established rapport with the participants (Mouton, 2011).

As the research paradigm was a qualitative study, suggesting an interpretive paradigm (Alvesson & Willmott, 2003), it is argued by the researchers that an interpretive approach is concerned with a particular individual's experience (Thorpe & Holt, 2008) in a particular context, rather than with abstract generalisations and is not necessarily concerned with the development of theory but rather that the value thereof is in the richness and depth of description of the phenomena under investigation. The interpretative endeavour of the researchers was a personal exploration as the outcome of the study was to make sense of the accounts and the experiences of the participants with regard to their day-to-day dealing with RFTs. The principle researcher was concerned with how the theory of servant leadership can provide meaning in the practical sense for the selection and appointment of RFTs to BoTs.

Sampling and participants

Purposive sampling strategies (Babbie & Mouton, 2011) were deployed. The aim was to interview some of the most recognised, highly regarded, respected, independent and professional RFTs currently serving the South African retirement fund industry. Participants with at least 15 or more years in the industry were sought. With tacit and intimate knowledge and experience of the industry, these RFTs, through their involvement and interest in the study, could contribute significance and meaningfulness to the study's final outcome. The researchers felt confident that the experts chosen are considered to be the best and experienced in the field of interest, thereby avoiding sampling error (Travers, 2008). A concise biography of each participant is presented below.

The FSB does not require registration or certification of RFTs. It is therefore difficult to understand the total number of RFTs active in the industry at any given point in time. To overcome the two weaknesses of purposive sampling, namely unreliability and bias, the researcher employed the following processes. The researcher made as broad an enquiry as possible with as many significant industry stakeholders as possible, whom they regard as the most professional, qualified and experienced RFTs currently in the industry. A shortlist was compiled from this information and 10 RFTs were identified. The researchers approached each RFT individually via an electronic letter, introducing the study and invited them to participate in the study. Those RFTs that expressed an interest in the study (a total of six) received further communication in writing, offering them the opportunity to enter into a confidentiality agreement with the researchers prior to the interview.

Participant 1 was a female in her late forties. She holds a BProc degree, an Advanced Diploma in Labour Law, a Higher

Diploma in Pension Law, as well as Business and Management Development Diplomas. She is a member of the Pension Lawyers Association and served on the Legal and Technical Committee of the Institute of Retirement Funds for a number of years, as well as on various sub-committees. She currently has an independent legal consultancy providing independent legal advice to BoTs of PFs, members and participating employers. She serves as RFT, principal officer and chairperson on a number of large PFs.

Participant 2 was a female in her mid-thirties. She received her BSc degree cum laude and is currently busy with her honours degree in human resources. She has 12 years of experience in human resource management and is currently serving as RFT and principal officer of one of the largest logistics and transport industry PFs.

Participant 3 was a male in his late thirties. He holds a Master of Law (LLM) from the University of South Africa. He is a director at an incorporated attorneys firm, specialising in the provision of independent legal and related services to PFs. He serves as legal advisor, independent chairperson, independent audit committee member, independent RFT and independent principal officer to a large number of industry, Bargaining Council and private employer PFs.

Participant 4 was a female in her late forties. She has a BA LLB (UCT), an HDIP (Tax) (Wits) and FPI qualification. She is an independent pensions law consultant. She is involved in documentation work, providing general pensions law advice, dispute resolution and corporate governance to PFs. She holds a number of appointments as RFT and independent principal officer appointments to large PFs.

Participant 5 was a 40-year old male. He holds a master's degree in business administration. He serves as RFT on closed medical schemes, umbrella retirement funds, umbrella preservation funds, umbrella trust funds and occupational retirement funds. He is also an independent principal officer, a member of surplus tribunals and a former member representative for surplus apportionment schemes and presents RFT training courses to aspirant RFTs.

Participant 6 was a middle-aged female. She holds a BA (US), BProc (UNISA), and LLB (UNISA) qualification. She has been an RFT of various large PFs since 1996, as well as a principal officer of various PFs since 2004. She is a provider of legal and compliance advice services to RFTs, PFs, administrators, actuaries, consultants and long-term insurers since 1995. She has also been appointed by the FSB as advisor to various specialist tribunals in terms of Section 15(k) of the *Pensions Fund Act*.

Data collection

The use of a semi-structured interview as the way to collect primary data was deemed most appropriate as it lends itself to an interpretative approach (Terre-Blanche, Durrheim & Painter, 2006). The semi-structured interview was structured

around topics to ensure data were collected that could be compared to the qualities that describe the servant leader character and conduct, ethics and the typical servant leader according to Sipe and Frick (2009). Observations and personal notes were kept to enrich the data collection process.

Findings and discussions

Table 2 illustrates the four main topics explored with the participants as organised in the semi-structured interview guide and includes the most significant codes referenced by all or most of the participants.

Participants considered the following qualities as most relevant and closely linked with conduct and character of RFTs: (1) Has an enquiring mind – P2, P3, P5 and P6; (2) Is a good listener and good communicator – P2, P3, P4 and P6; (3) Participants P4 and P6 cited ‘good communicator’ several times during the interviews; (4) Embrace and manage diversity – P1, P2, P4 and P6; (5) Has the ability to make sense of complexity – P1, P2, P3, P5 and P6 with P5 and P6 making several references to the importance of being able to make sense of complexity for self and others and (6) Constantly seeks and shares knowledge – P2, P3, P4, P5 and P6 and P2 elaborated extensively on the need to seek and share knowledge.

Field notes and observations with regard to remarks on conduct and character revealed the following:

Notes on Knowledge:

- It is significant to note that all the respondents are very passionate about their level of knowledge in regard to their subject and their continued personal and professional development. I support this view. It is also my personal experience, from having attended and advised hundreds of BoT meetings, that RFTs who invest in their ongoing development and who endeavour to remain up to date with current affairs in the industry make better decisions and are more inclined to participate actively in managing the important affairs of the fund.

TABLE 2: Major themes explored.

Construct	Themes
Conduct	Maturity Collaboration Good listener Good communicator Seeks and share knowledge
Character	Integrity trust Serves a higher purpose
Ethics	Morals Objective Authentic Courage
Servant-as-leader	Coach and mentor Upskill others Creator of community Visionary and sense maker

Notes on Independence and Objectivity:

- Indeed the independence and objectivity of these respondents are admirable. They proudly have no obligations, whether contractually or otherwise, to any particular stakeholder other than the members they serve. Their agenda is very clear – it is whatever agenda best serves the interests of all the stakeholders of the PF.

All participants referenced ethics as having and behaving in accordance with one’s own good moral compass and personal value system. The following were important to the participants relating to RFTs: (1) Has a strong moral code – P1, P2, P4, P5 and P6; (2) Behaves consistently authentic – P1 to P6; (3) Defends courageously what is right and in accordance with their personal value system or moral compass – P1, P4, P3 and P6.

Field notes and observations with regard to remarks on the ethics of RFTs revealed the following:

Notes on Participation and Popular Opinion:

- It is refreshing and encouraging to hear the views of the respondents in as far as popular opinion is concerned. In my experience the best decisions are made when educated personal opinions are openly debated and the best course of action is collectively decided based on facts. My most challenging encounters with BoTs have been where there have been no independent and honest opinions on the table. RFTs simply abstain from participation and take the ‘easy way’ out and that is to go with the popular opinion. This behaviour seldom translates into meaningful discussions or effective decision making.

Most participants seemed to share the same opinion that the leadership role of RFTs is that of coach, mentor and creator of community. Other codes emerged as listed below: (1) coach and mentor to others – P1, P2, P3 and P6; (2) role model – P2, P3, P4 and P6 with participant referencing the importance of being a role model to other RFTs several times during the interview; (3) RFT as leader creates community – P1, P2, P4, P5 and P6. P4, P5 and P6 have made extensive reference to RFTs as leaders in the creation of community and (4) RFTs must lead the vision – P4, P5 and P6.

Field notes and observations remarks revealed the following:

Notes on Leadership Responsibility:

- I am delighted at both the eagerness and seriousness with which the respondents consider themselves responsible to lead. There are many stakeholders of a PF and most needs guidance (leadership). If the leadership role is not taken up by the very people who have been entrusted with the welfare and well-being of the stakeholders, then who will? Strong leadership underpinned by SL attributes can only significantly improve the input and therefore the output of RFTs and BoTs in the best interests of those they serve (lead). I have often been witness to how the absence of strong leadership defaults to popular opinion and

which translates into indecisiveness, apathy and chaos amongst RFTs.

Based on the above, the following themes were identified as extensively referenced by all, or most of the participants: (1) Integrity; (2) Trustworthy; (3) Serves a Higher Purpose; (4) Maturity; (5) Independence; (6) Collaboration; (7) Enquiring Mind; (8) Good Listener and Good Communicator; (9) Manage Diversity; (10) Making Sense of Complexity; (11) Seeks and Shares Knowledge; (12) Moral Code; (13) Authenticity; (14) Courage; (15) Coach and Mentor; (16) Role Model; (17) Creator of Community and (18) Leads the Vision.

Table 2 illustrates the four main topics explored with the respondents as organised in the semi-structured interview guide and includes the most significant themes (15 themes) referenced by all or most of the participants. These themes will be discussed below.

Themes related to servant leaders' character

Integrity

'Honest, ethical, forthright, upright, trustworthy, credible – no matter what is called, servant leaders must maintain integrity' (Sipe & Frick, 2009, p. 25). All the participants referenced these qualities when asked to describe the character of RFTs. Most participants referred directly to integrity as a cardinal quality for RFTs. According to Goffee and Jones (2005), leaders must know themselves and others and reveal their 'true self' to others in order to establish integrity. Sipe and Frick (2009) caution leaders that behaving in a way or playing a role that is not the 'true self', will harm their integrity, as followers will have trust issues when they feel that they are being misled.

Trust

Trust is the belief and positive expectation that another will not harm you, thereby becoming vulnerable to the actions of that person. Trust is cooperation, openness, integrity, flexibility, reciprocity, and predictability. It is honest communication and commitment to common goals. Trust is built and sustained in everyday transparent engagements (Mayer, Davis & Schoorman, 1995). Participants P2, P4 and P5 spoke extensively on the topic of trust. They reminded the researchers that it is as important to trust others as it is to be trustworthy in the eyes of others. P4 responded by saying that it is important to demand trustworthiness from others, but to be sure to behave in a way that others can trust you.

Serve others

To serve others first is to have a service orientated character, thinking of others first with a sense of responsibility that is not an intellectual exercise. Greenleaf (1970, 1996, 1998a, 1998b, 2003) states that a calling to serve emerges from a deep desire to serve and is the primary motivator of true leadership. Sipe and Frick (2009) state that to serve others is different from helping others. To help others is by talking to them, whereas serving them is listening to them and then act to

serve them. To serve others first is to care more for their knowledge, skills, emotional and behavioural dynamics than for one's own. In one way or another, all the participants commented that being an RFT is about serving the interests of others and not one's own agenda, needs or ego. Participant 6 was especially passionate about accepting that one becomes an RFT to serve others.

Emerged themes related to servant leader conduct

Maturity

The ability to appreciate diversity (Greenleaf, 2003) and accepting differences are characteristics of a mature leader. Mature leaders (Sipe & Frick, 2009) have control over their thoughts, feelings and behaviour and their mature character behaves with consistent authenticity and optimism resulting in trustworthiness. Participant 2, P4 and P5 spoke often of the importance to conduct oneself in a mature manner when serving as an RFT. These participants mentioned several times during the interview that 'it is not personal or about you' – it is issues that must be addressed in a professional, mature manner.

Collaboration

Sipe and Frick (2009) start with the personal responsibility to trust and respect the opinions of others. Trust and respect in turn is dependent on placing a deep value on the truth and truth telling. To collaborate is to share power based on expertise and accountability. Collaboration is a commitment to the achievements of others first, before one's own success. The participants that did speak about collaboration (all but P6) did so in the context of the importance of collaboration for feedback, input and clarity in order for shared decision making to happen effectively.

Good listener and good communicator

People want to be heard. When people truly believe that you want to listen to them, they feel valued (Greenleaf, 1977). To be a good listener (Spears, 2010) can be learned; it is a skill much needed to achieve the other qualities described in this section. Sipe and Frick (2009) refer to a good listener as an empathic listener who seeks first to understand and then to communicate with unconditional positive regard. According to Sipe and Frick (2009), the effective communicator is able to mobilise others not through position or power, but rather with passionate persuasion and assertiveness.

The critical importance of being a good listener and good communicator when serving as an RFT was undoubtedly the strongest theme under this section, especially for P3, P4 and P6. These participants elaborated on how important it is to hear the views of others and how to effectively and assertively articulate one's own views for others to hear.

Seeks and shares knowledge

Greenleaf (1970, 1996, 1998a, 1998b, 2003) suggests that SL is a lifelong journey of discovery and learning. He states

that it is the constant strife for new insights that allows people to stretch their skill sets and be the best that they can be. Sipe and Frick (2009) state that with knowledge comes the responsibility to impart that knowledge so that others can grow and can benefit the greater community. Servant leaders have a desire for knowledge, to develop and to improve themselves and others over their lifetime. They are self-aware, reflective, and want to be the best leaders they can be so that they can positively impact their communities. All the participants agree that, without knowledge, you cannot serve as an RFT. All participants also agreed that it is the responsibility of every RFT to impart knowledge as often and as best they can.

Emerged themes related to servant leadership ethics

Three main themes emerged: strong moral code, authenticity and courage.

Strong moral code

Sipe and Frick (2009) state that the authentic servant leader nurtures enough self-awareness to know their true north. 'A servant leader lives, loves, and leads by conscience – the inward moral sense of what is right and what is wrong' (Sipe & Frick, 2009, p. 16). The one quality (Covey, 1989) that sets SL apart from any other leadership theory is the selfless character that chooses right over wrong by applying intellect to do what is moral and ethical and in accordance with one's own moral compass and that is the reason why some leadership theories work, but SL endures.

All the participants referred to either 'a moral compass' or an 'own value system' that is necessary to know right from wrong and act accordingly. Strong themes from all the participants include independence, objectivity and impartiality in order to remain above the agendas of others and popular opinion, in order to do the right thing for their members.

Authenticity

An authentic character acts rightly in the face of popular opposition and fear and is liberated from perceptions and paradigms of society. The authentic leader is not a victim but 'response-able' to do what is right and oppose what is wrong (Spears, 2010). Participant 2, P3 and P6 referred to authenticity as not having double standards in and outside the role of RFT. They all mentioned the importance of applying the same principles and values to the role of RFT as they would to their normal lives as ordinary citizens.

Courage

According to Sipe and Frick (2009), courage is not to act on popular opinion, but to gather all the facts and then to lead the way. Courage is to collect the input of all and not to decide on one's own the best course of action. To be able to take courageous and decisive action, one needs foresight,

vision and creativity (Greenleaf, 1970, 1996, 1998a, 1998b, 2003). Participant 3 and P4 spend some time talking about courage and the need for courage when important decisions need to be made. They argue it is then that one can easily be derailed by popular or majority opinion; courage is needed to serve the cause.

Themes related to the servant as leader

Three main themes emerged: coach and mentor, creator of community, and visionary and sense maker.

Coach and mentor

Servant leaders value the developmental needs of others more than their own (Greenleaf, 1977; Spears, 1995). Servant leaders want to develop other people, because they believe that everybody has something unique that they can contribute. They develop people on multiple levels, personally and professionally, in a pro-active way.

Participants P1, P2, P3 and P6 responded by using the words 'coach' and 'mentor' to explain the role and responsibility of RFTs to develop others around them. Participant 2 said that it is one's responsibility to upskill others, whereas P3 spoke of the responsibility RFTs have to develop the next generation of RFTs.

Creator of community

Community is created when the needs of a diverse group of people are aligned to common goals, and outcomes are mutually beneficial to all who contribute. Community is about less structure and more cooperation. Creating community is about developing alliances and partnerships, and it is an important skill for leaders to have. Creating community is giving feedback and to value the inputs and views of others, building teams and resolving conflict among community members. For P4, P5 and P6, the construct of community revolved around sharing power, sharing accountability and sharing in the decision-making process. Trust was again a central theme in the building of community according to these participants.

Visionary and sense maker

Leaders require vision to serve others with efficiency and effectiveness. Leaders must constantly find new ways to serve others better, and to do this, they need to have vision of exactly what 'better service' means. Sipe and Frick (2009) refer to foresight as creative vision. This foresight (vision) helps leaders to find direction and purpose. Purpose and direction is what is needed to make sense of complexity. Followers relate to and trust leaders when they provide purpose, direction and clarity. Most of the participants responded by using the words, 'guiding, clarifying or simplifying' complex issues for others, so that they can make sense of it. Participant 4, P5 and P6 all referred to the leadership role of RFTs to communicate the vision, and live the vision by example for others to follow.

TABLE 3: Comparison between literature and data gathered.

Themes	The nature of SL according to the literature	The nature of RFTs according to data collected from the participants
SL is a persons of character	SL is ethical and principle-centred decision making SL qualities are: <ul style="list-style-type: none"> • Integrity • Humility • Serves a higher purpose 	<ul style="list-style-type: none"> • Integrity • Trustworthy • Serves a higher purpose • Maturity • Independence • Collaboration • Enquiring mind • Good listener and good communicator • Manage diversity • Making sense of complexity • Seeks and shares knowledge • Moral code • Authentic • Courage • Coach and mentor • Role model • Creator of community • Lead with vision
SL puts the needs of other before their own	SL develops others SL qualities are: <ul style="list-style-type: none"> • Servant's heart • Coach and mentor • Care and concern for others 	
SL is a good listener and a good communicator	SL listens attentively and speaks honestly SL qualities are: <ul style="list-style-type: none"> • Empathy • Open to feedback • Communicates course of action convincingly 	
SL is collaboration with others for mutually beneficial outcomes	SL builds relationships, embraces diversity, and creates community SL qualities are: <ul style="list-style-type: none"> • Appreciation for the contributions of others • Unite teams and communities • Manage conflict effectively 	
SL leads the vision and mission for the cause and community they serve	SL is hope, possibilities and purpose SL qualities are: <ul style="list-style-type: none"> • Visionary • Creativity • Courage 	
SL is sense making	SL is a change agent, providing clarity and direction: <ul style="list-style-type: none"> • Simplify complexity • Adaptable • Considers the bigger picture 	
SL leads responsibly	SL is respected and respects others, is trustworthy and trusts others do their part: <ul style="list-style-type: none"> • Is responsible and accountable • Shares power with others • Holds others responsible and accountability 	

RFT, retirement fund trustee.

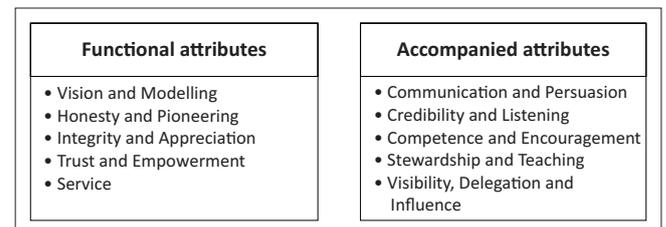
Next a comparison is provided, as illustrated in Table 3, between literature findings and data gathered during the semi-structured interviews.

Many studies have confirmed the characteristics in column 1 and 2 of Table 3 as being critical to servant leadership (Joseph & Winston, 2005; Russell & Stone, 2002; Sipe & Frick, 2009; Spears, 2010). These behavioural scientists further categorise servant leadership attributes, as seen in Figure 1 into functional attributes and accompanying attributes, whereas functional attributes are defined as intrinsic characteristics of servant leaders, and accompanying attributes complement and enhance the functional attributes.

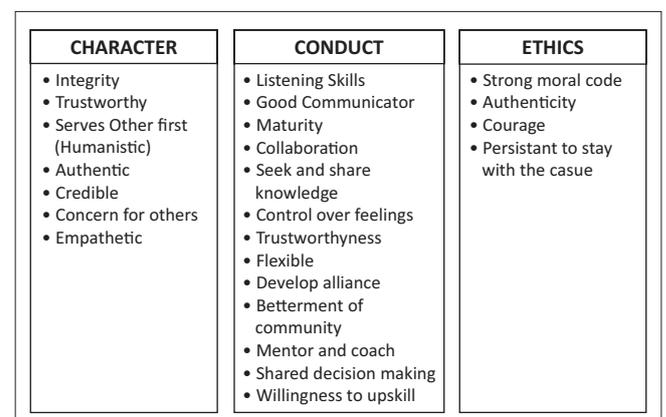
A parallel can be drawn between the servant leadership attributes defined by literature and the servant leadership qualities derived from the data gathered. The servant leaders qualities derived from the data gathered, as shown in Figure 2, covers extensively the functional and accompanying attributes of servant leadership as described above.

Practical implications

This exploratory research supports the principles and recommended practices of the Financial Services Board Circular PF130, a framework for good PF governance. The principle of the circular is to ensure that RFTs and boards of trustees are responsible institutional citizens and that their practice is to protect, enhance and invest in the well-being of society, the economy and the retirement fund industry as



Source: Adapted from Joseph and Winston (2005), Russell and Stone (2002), Sipe and Frick (2009) and Spears (2010)

FIGURE 1: Attributes.**FIGURE 2:** Servant-as-leader: Retirement fund trustee profile.

a whole. Undoubtedly, these responses articulate the values, principles and moral attributes RFTs need for their behaviour and decision making to be aligned with Circular PF130 principles and recommended practice.

The servant leader profile can be used in many different ways to aid the selection of RFTs to BoTs of PFs:

- The servant leader profile can be translated into a survey to gather information from relevant and interested industry parties about a person who is being considered for appointment to a BoT.
- The servant leader profile can be used as a self-measurement tool for individuals to critically and honestly reflect if they have the servant leader qualities needed to serve as RFTs before they accept appointments as RFTs, or make themselves eligible for election to BoTs.

The servant leader profile can be used as a communication tool to inform members of PFs participating in elections about the servant leader qualities RFTs need to serve their best interests. They may know the nominated candidates well enough to make an informed decision about their vote, or they may use the SL profile to gather information from others about the nominated candidate to inform their vote.

The Financial Services Laws General Amendment Bill (2012) proposes changes to the *Pensions Fund Act*. These include the following:

- *A new sub-section (3) to Section 7(a) of the Act*: the Registrar of PF to prescribe minimum skills and training each trustee must attain within 6 months of appointment and retain throughout their term in office.
- Elevating Financial Services Board Circular PF130 to that of a Directive for the governance of PF.
- The Financial Services Board to monitor trustee appointments (including 'fit and proper' requirements).

Practical contributions are derived in that the study can be used by the South African retirement fund industry to better the selection of RFTs who are better equipped to comply with the proposed retirement reform proposals, and which will potentially benefit the members they intended to serve from the outset.

In a very practical way, the servant leader profile derived from the study can be included in the toolkit of BoTs to select and appoint RFTs. The servant leader profile can further be translated into a functional guideline or code of conduct for RFTs. The SL profile can also be included as theory in RFT training programmes.

Limitations and recommendations

The relative small purposive sample group, given the large number of RFTs active in the South African retirement fund industry, limits the extent to which generalisations could be made. It is further acknowledged that the scope of this study was limited to RFTs in South Africa and that international trends and practices were not consulted. It is important, however, to note that the small homogenous sample group contributes to validity as they were purposively targeted. The proposed profile for RFTs is presented in Figure 1, and it is strongly recommended that available validated measuring

instruments be pursued to be used in conjunction with the suggested profile of RFTs.

Conclusion

The study supports the views of Achua and Luccier (2010), Greenleaf (1970), Sipe and Fick (2009), and Spears (2010) that the nature of SL is about ethics, integrity, humility and that it serves a higher purpose. One should develop others and be concerned about your community and their affairs. Good communication skills, the manner in which one behaves, being able to embrace diversity and having the courage to stand by personal beliefs are fundamental characteristics of the servant leader. Making sense of complexity and being able to adapt is essential.

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Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

Authors' contributions

L.M.M.H. made the conceptual contributions to the original research and wrote the manuscript. F.L.G. was the principal researcher and field agent and conducted the interviews. A part of this manuscript was extracted from F.L.G.'s minor dissertation.

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