

# **New Leader Agendas & Legacy Organizational Culture: A Case Study Exploring Learning's Role in Bridging the Great Divide**

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*The learning community has a vested interest in bridging the divide between leadership and culture. Leaders must be attuned to cultural dynamics. Culture is replete with complexities that can hinder new leaders. Learning can help inform and influence how leaders instill cultural changes that may be necessary. This case study of a public sector organization revealed two overarching themes relevant to learning: culture change takes time and must be communicated with care to alleviate stress; and culture change must consider affective elements. Given these findings, a new perspective of culture emerges. Implications for learning scholars and practitioners are presented.*

## **INTRODUCTION**

*“Culture and leadership are two sides of the same coin.”*

(Schein, 2010, p. 22)

This opening salvo is powerful for purposes of pondering the dynamics of culture. As described in the following case study of a public sector organizational environment, this manuscript addresses the organizational culture-related complexities confronting new leaders (especially those at the executive level). Within the public sector organization (hereafter, PSO) into which the author was granted permission to study, recent leadership changes triggered a perception that a cultural assessment was in order. How often do we hear incoming leadership pronounce sweeping cultural changes, only to hear the undercurrent of resistance by the workforce? Culture is a complex phenomenon (Dull, 2010; Martin, 2002; Schein, 2010), and is not changed simply by virtue of a new organizational leader's position or doctrine.

In the narrative that follows, definitions of culture are reviewed. An expanded view of organizational culture is proposed. The PSO's culture and leadership problems will be reviewed, followed by empirical research solutions grounded in the case study methodology that were taken to identify barriers. The case study encompassed observations and interviews. I gained access to the PSO through trusted agents, and had the opportunity to observe the PSO's leadership interactions through town halls, staff meetings, and informal scenarios. I also heard about stories and rituals that left indelible impressions on tenured employees. Structured interviews were conducted.

The final section addresses implications for learning practitioners and scholars. Tables, figures and appendices are included, where appropriate, to further illustrate key concepts. Without exception, the organization and participant names are pseudonyms.

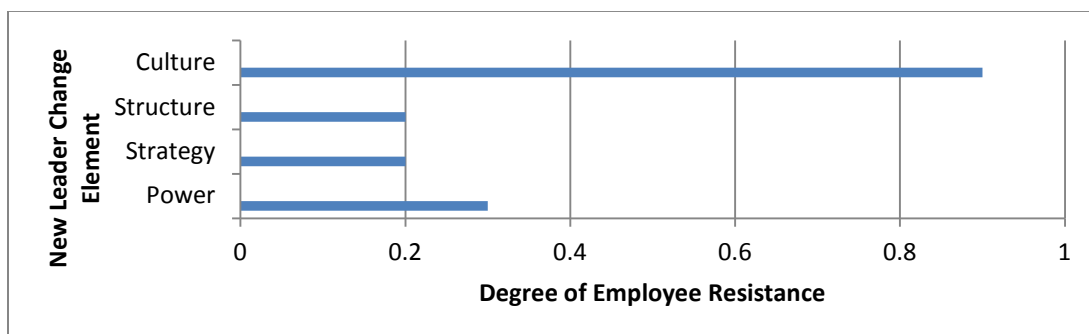
## The Problem

The PSO is a mid-sized organization of between 500 and 1,500 employees within a governmental entity geographically located in the Middle-Atlantic region of the United States. The PSO's workforce is predominantly comprised of human resources and information technology occupations. During the period from December 2010 through August 2011, the entire senior leadership team within the PSO changed. All executives were hired from outside the PSO – no internal promotions were made. The Chief Executive Officer (CEO) was from an occupation not related to the PSO's core workforce and, perhaps not surprisingly, an unknown commodity to most employees. At an "all hands" meeting soon after his arrival, the CEO pronounced a culture change was in order. Soon afterwards, the rumor mill was in full swing: despite periodic leadership messages the CEO sent via email to all employees, the prevalent mood (Bar-On, 1997) was that employees did not trust CEO intentions and were convinced that efforts to change the culture would go unheeded, as they saw no reason for the change. The leader appeared convinced that there was an integrated perspective of culture when it also appeared evident that employees were comfortable with a differentiated perspective (Martin, 2002). These perceptions were anecdotal and informally shared with the researcher by several employees.

Landmark research conducted by Romanelli and Tushman (1994) focused on punctuated equilibrium. Their study focused on changes in power, structure, and strategy. Interestingly, their original research framework also included culture as a variable – however, culture was removed from further consideration given its amorphous nature (Romanelli & Tushman, 1994). This important decision in framing their research study has parallel effects in many organizations: employees seem to adapt to a new leader's agenda when it comes to making changes in strategy and structure. This is not surprising, since a leader's vision typically involves these variables, and employees may even have heightened expectations that structural or strategic changes are warranted when a leader arrives (especially if the executive was hired from the outside).

Cultural changes, however, may encounter significant resistance. Van Maanen and Schein (1979), who made seminal contributions towards an understanding of organizational socialization, posited six dimensions of socialization (e.g., collective vs. individual; sequential vs. random). For leaders new to an organization, one dimension of particular emphasis is investiture (smooth entrance into an organization) vs. divestiture (personal characteristics are denied by established members). New leaders potentially face several perilous conditions – they "may question old assumptions about how the work is to be performed, be ignorant of some rather sacred interpersonal conventions that define authority relationships within the workplace, or fail to properly appreciate the work ideology or organizational mandate shared by the more experienced members present on the scene" (p. 211). Arguably, these perilous conditions reflect the cultural resistance that new leaders can encounter. Figure 1 illustrates this concept. Multiple cultures may exist within the portfolio governed by the new executive. This discussion leads to how culture is defined, which is the focus of the section that follows.

**FIGURE 1**  
**NOTIONAL EMPLOYEE RESISTANCE LEVELS TO NEW LEADER**  
**CHANGE ANNOUNCEMENTS**



**PURPOSE AND RESEARCH QUESTION**

The purpose of this study is to understand the complexities of leaders new to an organization, from a cultural standpoint. “It takes considerable insight and skill for a leader to understand the current culture in an organization and implement changes successfully” (Yukl, 2010, p. 309). What is most important about any event is not what happens but what meaning people assign to it. This is complicated by the fact that people may not interpret experiences in the same way, especially within a cultural context. Ambiguity and uncertainty may prompt employees to assign meaning of their own choosing, and those interpretations may form a highly interwoven patchwork of culture (Bolman & Deal 1997). Bolman and Deal (1997) asked the question, “do leaders shape culture, or are they shaped by it?” (p. 231). Schein (2010) resolutely answered: “if leaders ... do not become conscious of the cultures in which they are embedded, cultures will manage them” (p. 22). Accordingly, the overarching research question is: What are the organizational culture dynamics to which a new leader must attend?

**CULTURAL PERSPECTIVES**

Martin (2002) delineated no fewer than twelve definitions of culture, one of which was hers. For purposes of brevity, those definitions are not repeated here. Rather, it suffices to state that defining culture can embody ideational and materialistic approaches, have varying degrees of breadth and depth and are manifested in a variety of ways (Martin 2002). In discerning the multitude of approaches to culture, Burrell and Morgan (1979) offered specific paradigms impacting the ways in which culture can be viewed by leaders. For example, the functionalist paradigm is problem-oriented, and functionalist organization theory is focused on a task or goal. In contrast, the interpretive paradigm “seeks explanation within the realm of individual consciousness and subjectivity” (Burrell & Morgan, 1979, p. 28). Figure 2 is a rudimentary illustration of the Burrell and Morgan (1979) four paradigms model. Interested readers are encouraged to further explore their pioneering contributions to social theory.

**FIGURE 2  
BURRELL AND MORGAN’S SOCIAL THEORY PARADIGMS**

SOCIOLOGY OF RADICAL CHANGE	
<p style="text-align: center;"><b>Radical Humanist</b></p> <ul style="list-style-type: none"> <li>• Subjective orientation</li> <li>• Focus: release from social constraints</li> <li>• Critiques the status quo</li> <li>• Key words include: radical change, emancipation, potentiality</li> </ul>	<p style="text-align: center;"><b>Radical Structuralist</b></p> <ul style="list-style-type: none"> <li>• Objective orientation</li> <li>• Focus: Conflict and change in structural relationships</li> <li>• Fundamental conflicts generate change</li> <li>• Key words include: conflict, contradiction, deprivation</li> </ul>
<p style="text-align: center;"><b>Interpretivist</b></p> <ul style="list-style-type: none"> <li>• Subjective orientation</li> <li>• Focus: Nature of social world through subject’s lens</li> <li>• Human affairs are integrated</li> <li>• Key words include: social order, consensus, cohesion</li> </ul>	<p style="text-align: center;"><b>Functionalist</b></p> <ul style="list-style-type: none"> <li>• Objective orientation</li> <li>• Focus: provide rational explanation of social affairs</li> <li>• Highly pragmatic: knowledge that can be used</li> <li>• Key words include: status quo, solidarity, need satisfaction</li> </ul>

SOCIOLOGY OF REGULATION

Note: Adapted from *Sociological Paradigms and Organisational Analysis* by G. Burrell and G. Morgan, 1979, 22-37. Copyright 1979 by G. Burrell and G. Morgan.

Although not exhaustive, Figure 3 below illustrates the paradigmatic grounding of selected culture scholars as well as this researcher.

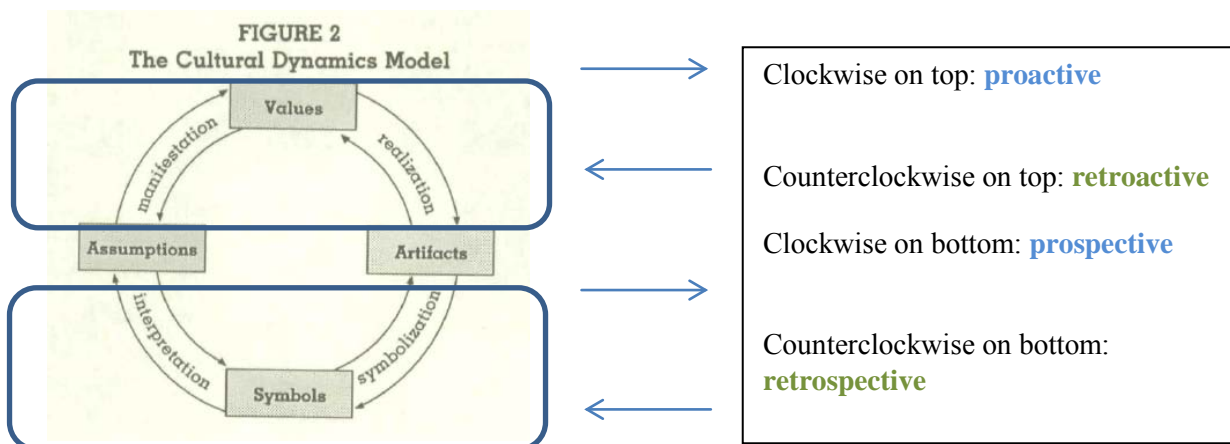
**FIGURE 3  
SELECTED CULTURE SCHOLAR PARADIGM ORIENTATION**

<b>Interpretivist</b>	<b>Functionalist</b>
<ul style="list-style-type: none"> <li>• Geertz</li> <li>• Hatch</li> <li>• Martin</li> <li>• Rude (manuscript author)</li> </ul>	<ul style="list-style-type: none"> <li>• Schein</li> <li>• Albert &amp; Whetten</li> <li>• Denison</li> <li>• Giddens</li> </ul>

The term *culture* has spawned panoply of definitions and its applicability to many disciplines (Dull, 2010). For purposes of this study, an interpretivist epistemological stance is taken since it is viewing new leaders through the employees’ organizational culture lens. However, functionalism has greatly influenced culture research (Martin, 2002) and as such has theoretical traction in this manuscript. Three scholarly perspectives on culture resonated in particular:

1. Geertz (1973) – “thick description” (p. 27) – culture is richly portrayed by those experiencing it.
2. Schein (1992) – “a pattern of shared basic assumptions ... way[s] to perceive, think and feel” (p. 12). Assumptions are revealed in espoused values which, in turn, tangibly manifest themselves as artifacts.
3. Hatch (1993) - Extended the Schein model by emphasizing the dynamics of culture and a fourth element (beyond artifacts, values and assumptions): symbols, which accord meaning to an artifact. The Hatch (1993) model is illustrated in Figure 4, below. Also, links to the means by which the four elements within this circular dynamic model are indicated. A detailed adaptation of this model is described in Appendix A.

**FIGURE 4  
ADAPTATION OF HATCH (1993) CULTURE DYNAMICS MODEL**



## **A Proposed Organizational Culture Definition Expansion**

While recognizing a proclivity towards specific hues of extant culture definitions, all definitions offered by Martin (2002) were unfulfilling to varying degrees. Schein (1992) called for an appealing recipe of considering assumptions, values and artifacts and, in his latest iteration (2010), acknowledged the plausibility of sub-cultures. Of concern with Schein, though, is the phrase “that has worked well enough to be considered valid”, which remains central to his cultural definition (Schein, 1992, p. 12). Worked well enough as considered by whom? How is validity determined? Is validity essential? These concepts appear to objectify culture, leaving Schein still squarely within the functionalist perspective.

Martin’s (2002) three perspective orientation encompasses integration, differentiation, and fragmentation. A “home perspective” (Martin, 2002, p. 121) exists; for me, that is differentiation. In finding that sub-cultures typify the complexion of large organizations, I subscribe to Martin’s metaphor that the differentiation perspective accords sub-cultures as “islands of clarity in a sea of ambiguity” (p. 94). Sub-cultures can be “enhancing, conflicting and independent” of one another, and that identities are beholden to levels of analysis other than at the organization or institutional level (p. 152). Although this perspective aligns with the subjectivity statement vis-à-vis the organization being studied, a differentiation perspective – while receptive to integration and fragmentation – has been my cultural orientation for some time. Differentiation also accommodates positional issues, which relate to this study.

Given the above, this manuscript offers an expanded perspective of organizational culture as follows, borrowing strains from Geertz (1973), Hatch (1993), Martin (2002), and Schein (1992):

Culture is represented by basic assumptions that are shared by groups within an organization, richly described through the espousal of values and symbols that assign substantive meaning to tangible artifacts (e.g., stories, rituals, norms). Culture is dependent on leadership as well as the express sanctioning by employees.

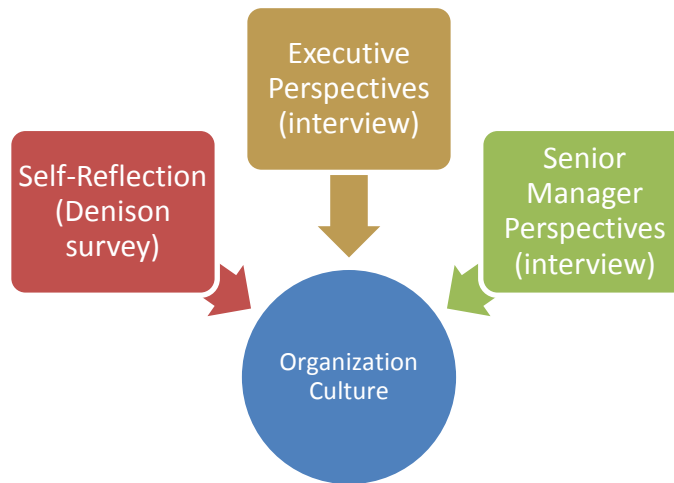
As will be discussed below, this emergent cultural definition considers the results and implications stemming from the PSO study. Through the organizational culture analysis that follows, application of the Hatch (1993, 2011) models, Denison culture survey and other research to support inductive findings will be discussed. As such, the methodology, results, and implications sections below are important implements in the learning tool kit.

## **METHOD**

Based on the foregoing definition and contextualization of culture, an analysis of the PSO was conducted. The methods and methodologies employed will be described below, and are addressed in a chronological sequence. A subjectivity statement expressing this researcher’s implicit assumptions and biases (Morrow, 2005) is as follows: although I believe in the PSO’s core mission, I discerned that leadership efforts to realign the organization have adversely affected the culture. I believe that culture is a complex phenomenon, and is not changed simply by virtue of a well-intentioned leader who proclaims that a new culture is required in order to effectively achieve the PSO’s mission. To a degree, results of the Denison culture survey capturing the author’s impressions from personal observations of the PSO, described in an ensuing section, represents a de facto subjectivity statement.

To promote trustworthiness of this study, different perspectives were elicited as depicted in Figure 5, below:

**FIGURE 5**  
**ORGANIZATIONAL CULTURE PERSPECTIVES**



### **Qualitative Approach**

Temporal constraints facing leaders and learning practitioners may not allow for an in-depth immersion into the culture, which typifies ethnography (Creswell, 2007; Maxwell, 2005). The qualitative methodology was predominantly a case study of a single organization. The PSO represented a bounded case (Creswell, 2007) in which the leadership and cultural dynamics were explored, in order to gain in-depth understanding of those dynamics. That stated, Hatch (1997), which focused on an ethnographic approach, offered valuable insights for data collection via observations and interviews that were relevant to this study. Her three-step model for studying organizational culture was useful. For example, extreme care was taken to let the data speak to this researcher in an inductive manner, rather than deductively formulating a hardline position and hoping the interview results would simply affirm preconceived notions. Also, the inductive approach was congruent with the extant differentiated perspective resonant within the PSO: this is important as Martin (2002) cautioned that the perspective lens is study and organizational dependent. In this regard, leaders and learning practitioners would be well-served to conform with Hatch's (1997) caution not to "impose an order to a meaning onto the data based only on your own biases or strictly personal interpretations" (p. 222).

### **Denison Culture Survey**

To frame the cultural analysis, a Denison culture survey comprising of 60 questions was conducted to ascertain cultural aspects of an organization (<http://www.denisonconsulting.com>). The Denison organizational culture survey includes representative items such as the extent to which:

- There are clear and consistent values
- A shared vision exists
- A guiding ethical code exists
- A visible, unified culture exists
- Consensus is reached
- A common perspective is shared across the organization
- Leader actions reflect leader words
- Organizational learning is important

These and other cultural survey variables help to ascertain the degree to which employees at different organizational levels are aligned as well as, arguably, which cultural perspectives (Martin, 2002) appear to reside within the organization.

Although a percentile vice raw score methodology explains cultural perceptions, it also emphasizes the need to triangulate the Denison survey with other approaches in order to promote validity (Maxwell, 2005). Accordingly, interviews with employees of the PSO were used to complement the observation based self-reporting Denison results, and to mitigate researcher bias. The following section describes the interview protocol.

### **Interview Protocol**

Previously, it was described that one impetus for studying the PSO was based on recent leadership changes and culture change advertisements. Interview guidance provided by Maxwell (2005) was followed; for example, “purposeful selection [in which] particular settings, persons or activities are selected deliberately [because they are] experts [or] privileged witnesses” (p. 88). To that end, nine participants were selected to be interviewed during a 30-minute session. I intentionally selected three executives, all of whom transferred into the PSO from other organizations within the last six months. The remaining six participants were senior managers – one level underneath executives – who experienced the cultural transitions during that same six month period. All senior managers had been with PSO or its predecessor organization for at least three years. Interviews occurred between November 15 and 23, 2011 and in person, with one exception. The interviews were structured in nature, i.e., the same six questions were asked of every participant. Interview questions were congruent with Denison culture survey themes. The validity (or trustworthiness) technique of member checks was used as a way to bolster researcher credibility and to acknowledge the participant’s own voice in the study (Creswell, 2007). A participant summary follows in the next section.

### **First Cycle Coding**

To ascribe with Hatch (1997) and Saldana (2009), this study engaged a phased approach for collecting and analyzing data. Hatch (1997) emphasized an inductive approach when studying cultural dynamics, in order to remain objective and to discern emerging symbols and meanings. In a similar vein, Saldana (2009) defined *first cycle coding* as a way to categorize and classify emergent data from the qualitative study. Given the complementary objectives of Hatch (1997) and Saldana (2009), four codes were used to segregate data and highlight salient features: attribute; descriptive; in vivo; and pattern. Each is briefly described, below (with pattern coding addressed in Second Cycle).

#### *Attribute Coding*

Saldana (2009) indicated that attribute coding “logs essential information about the data and demographic characteristics” of research subjects (p. 55). Table 1 below provides attribute coding about the nine interviewed participants:

**TABLE 1  
ATTRIBUTE CODES**

<b>Participant Pseudonym</b>	<b>Age Bracket</b>	<b>Gender</b>	<b>Ethnicity</b>	<b>Interview Date</b>	<b>Industry</b>
<b>Executive Level</b>					
E1	40-45	Female	Caucasian	November 21	Human Resources
E2	45-50	Female	Caucasian	November 23	Information Technology
E3	50-55	Male	Caucasian	November 21	Human Resources
<b>Senior Manager Level</b>					
M1	45-50	Male	African American	November 15	Human Resources
M2	55-60	Male	Caucasian	November 23	Information Technology
M3	45-50	Male	African American	November 21	Human Resources
M4	50-55	Female	Hispanic	November 21	Human Resources
M5	50-55	Female	Caucasian	November 22	Learning & Development
M6	50-55	Female	Caucasian	November 21	Marketing

*Descriptive Coding*

As noted by Saldana (2009), this coding is useful for virtually any qualitative study but when devices such as interviews are involved, and when the researcher is trying to figure out what is going on. As framed at the outset of this paper, these criteria are relevant.

*In Vivo Coding*

A key objective of the interviews was to capture the voice of participants. Ideally, this is done with direct quotes that ‘leap off the page’ and resonate with the researcher in terms of compelling stories, other artifacts and potential themes. Accordingly, in vivo – meaning “in that which is alive” – was determined to be crucial for this study (Saldana 2009, 74).

**Second Cycle Coding**

Based on the first cycle coding (Saldana 2009) and culminating with the third step of Hatch (1997), this phase is where “deeper beliefs, assumptions, and symbolic patterns of meaning linking the norms, values, and themes begin to reveal themselves” (Hatch, 1997, p. 222). In this vein, Saldana’s (2009) pattern coding technique aligns with Hatch (1997) and was used to analyze results below.

This section described the methods used in this study, namely: organizational culture insights from Hatch (1997); Denison consulting survey instrument; interview methodology and protocol; and four coding techniques proffered by Saldana (2009) – attribute, descriptive, in vivo, and pattern coding. These composite efforts led to results that are addressed in the narrative that follows.

**RESULTS**

The preceding section detailed the methods used to gather data analyzed in this study. This portion addresses the results and, stemming from the analysis, was used to inductively research extant literature for theoretical or empirical underpinnings, and identify patterns or themes that emerged.

**Denison Culture Survey**

As noted earlier, I responded to the questions in light of my observations of the PSO. Ideally, scores from the 12 categories are at or near the outer periphery. This ideal contrasts with results illustrated in



Figure 6, below (note: scores were in terms of percentiles and have a minimum of 1 and a maximum of 100).

**FIGURE 6  
DENISON SURVEY RESULTS: SELF-REPORTING FOR PSO**



At first glance upon reviewing the individual categories shown in Figure 4 above, the results were not too surprising. The PSO has a fairly strong mission orientation, one that is closely linked to public service. As such, a compelling customer focus (shown in the Adaptability quadrant) is logical. Evident weaknesses were most pronounced in the Involvement and Consistency quadrants. Descriptions of specific deficiencies, as noted in the Denison web site (<http://www.denisonconsulting.com>) and in comparison to specific survey items that underscored weakness are provided in Table 2, below.

Although individual categorical scores were not surprising, as indicated, comparisons of categories yielded unexpected results. For example, capability development was in the 1<sup>st</sup> percentile (i.e., 99 percent of organizations had higher scores) while organizational learning was in the 93<sup>rd</sup> percentile (indicating only 7 percent of organizations fared better). Also, core values within the organization (in the 1<sup>st</sup> percentile) are interesting when compared to the comparatively strong percentile scores in the Mission quadrant. The lack of intuitive results emphasizes the need to use multiple techniques in a qualitative study (Creswell, 2007; Maxwell, 2005). With the Denison survey results analyzed, attention now turns to results from participant interviews.

**TABLE 2**  
**DENISON CULTURE DESCRIPTIONS AND SURVEY FINDINGS FOR DEFICIENCIES**

Deficiency	Description from Denison Web Site	Associated Self-Reported Finding
Teamwork	Encouraged so that creative ideas are captured and employees support one another in accomplishing the work that needs to get done.	<ul style="list-style-type: none"> <li>• People work like they are part of a team (percentile: 1<sup>st</sup>)</li> <li>• Cooperation across different parts of the organization is actively encouraged (percentile: 5<sup>th</sup>)</li> </ul>
Capability Development	Practiced in a variety of ways, including training, coaching, and giving employees exposure to new roles and responsibilities.	<ul style="list-style-type: none"> <li>• “Bench strength” is constantly improving (percentile: 1<sup>st</sup>)</li> <li>• Capabilities...are viewed as an important source (percentile: 1<sup>st</sup>)</li> </ul>
Core Values	Help employees and leaders make consistent decisions and behave in a consistent manner.	<ul style="list-style-type: none"> <li>• Ignoring core values will get you into trouble (percentile: 1<sup>st</sup>)</li> <li>• There is a clear and consistent set of values that govern how we do business (percentile: 9<sup>th</sup>)</li> </ul>
Agreement	Engaging in dialogue and getting multiple perspectives on the table.	<ul style="list-style-type: none"> <li>• A “strong” culture (percentile: 1<sup>st</sup>)</li> <li>• It is easy to reach consensus, even on difficult issues (percentile: 1<sup>st</sup>)</li> </ul>

### Interviews

The interview technique complemented the self-reporting Denison culture survey instrument, partially to balance perspectives on PSO’s culture and to mitigate self-reporting bias. As noted in the preceding Method section, descriptive and in vivo codings were used to help ascertain the nature of the topic being studied (Saldana, 2009). To that end, a coding summary of participant responses is provided in Table 3, which follows.

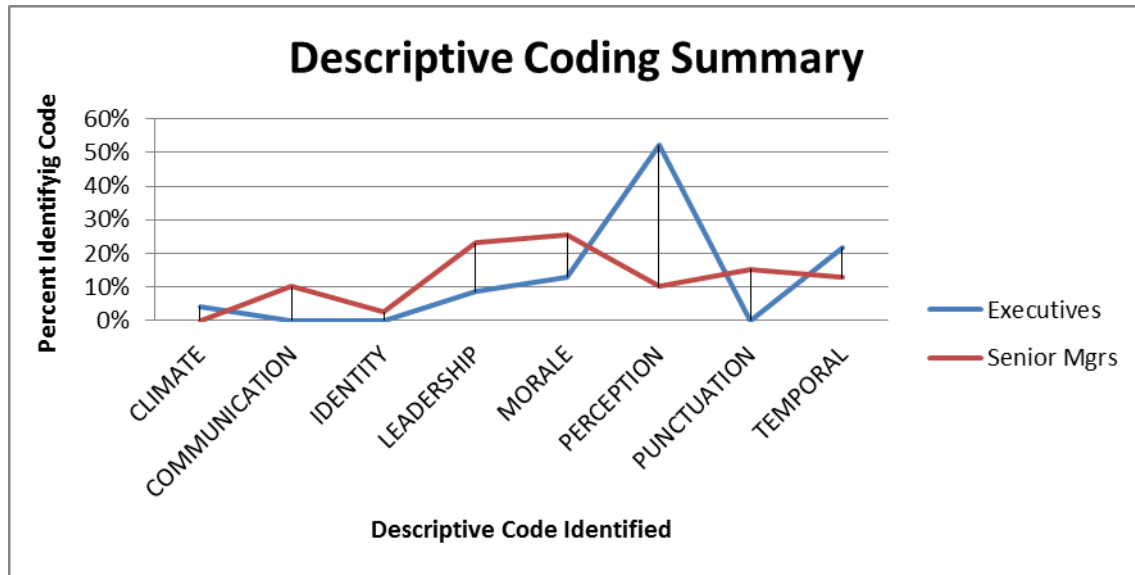
**TABLE 3**  
**DESCRIPTIVE AND IN VIVO CODING SUMMARY**

Code	Description	In Vivo Sampling	Exec Count	Sr Mgr Count
CLIMATE	Organization climate important	“fortress mentality”	1	
COMMUNICATION	Verbal or written communication identified	“created confusion”, “shifting sands”		4
IDENTITY	Organizational identity was impacted	“our new identity”		1
LEADERSHIP	Role of leadership was germane	“lack of consistent leadership”, “new”	2	9
MORALE	Morale was impacted by culture change	“in prison”, “painful”, “wounded”, “psychological”	3	10
PERCEPTION	Interviewee perception	“different”, “broad concept”, “I guess”	12	4

PUNCTUATION	Culture change initiative was dramatic	“shock”, “never saw it coming”, “taken by surprise”		6
TEMPORAL	Time was a factor in culture change	“doesn’t happen overnight”, “allow...for time”	5	5
Total Number of Descriptive Coding Comments			23	39

Earlier, it was noted there were three executives and six senior managers who agreed to be interviewed. In order to account for the difference of respondents in each category and to identify where differences in perceptions existed, responses were prorated based on their frequency relative to the total number of descriptive coding comments that emerged. Figure 7 below depicts those perceptions in graphic form.

**FIGURE 7**  
**DESCRIPTIVE CODING SUMMARY: PERCEPTION COMPARISONS**



When viewed in this manner, differences are at times startling. For instance, significant differences in the “perception” category surfaced. Statements such as “I felt”, “I guess” and the like were cues about the participant’s perception about a given topic or situation. That executives cited perceptions to a far higher degree than senior managers may be due to their relative newcomer status in the organization, as they are still trying to figure out what those perceptions mean – whereas, tenured managers can more easily translate that perception into, for example, a communication issue or a shock (punctuation) to the system (Romanelli & Tushman, 1994).

Leadership and morale, while identified as distinct descriptive codes, were joined together in a number of responses. On leadership, executives were more apt to affirm the Chief Executive Officer’s role, while senior managers conveyed issues of trust and questionable motives of the CEO. The CEO is viewed as a mission-oriented leader – conversely, respondents seemed to appreciate a symbolic interactionist and Meadian perspective (Denison, 1996). In this manner, Hatch (1993) noted that manifestations proactively or retroactively influence values. Executives appear to be proactively engaging

values, in order to organize action and experience. Conversely, senior managers view leader values as disjointed with manifestations. Consequently, the PSO lacks traction to enter the realization phase – see Appendix 1 for details (Hatch, 1993).

Morale was disconcerting to senior managers. Similar to a study conducted by Meyerson (1994), burnout and stress are already evident. Participant M4 stated:

“It’s all been very disjointed. It’s been difficult. I was all ready to adapt to the changes but I really haven’t felt a part of it at all.”

As with the Meyerson (1994) study, how people react to burnout and stress (along with ambiguity) is a situative phenomenon. Given that PSO is in its infancy stage, a longitudinal study on the effect of stress is premature. However, warning signs (e.g., cancellation of the annual holiday party due to lack of interest) was a resounding theme of concern from managers, and to which they believe leadership must attend. Although the holiday party cancellation was a single event and was counter to the PSO’s prior history, that ritual (Geertz, 1973; Martin, 2002) has perpetuated speculation about the humanity of the CEO (Martin, Feldman, Hatch, & Sitkin, 1983). As noted by Schein (1992), if leaders do not manage culture, culture will manage them.

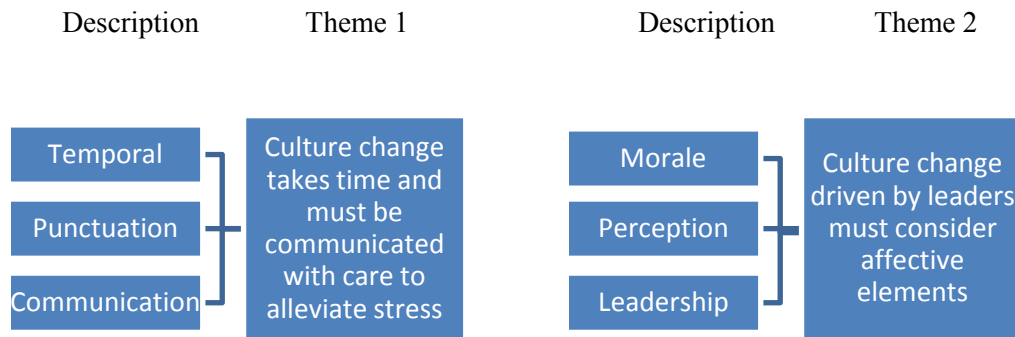
The nascent PSO organization also resulted in acknowledging culture’s temporal nature. Most comments concerning time were to the effect that it was too early to tell whether culture changes would be successful, whether leadership mandates on culture would be extolled by the workforce, or where the PSO’s home perspective(s) (Martin, 2002) would ultimately reside. (Currently, PSO’s culture appears to be differentiated if not fragmented.) Predicting how successful the PSO will be in addressing obstacles (Martin et al, 1983) is an uncertain enterprise. At present, though, there are distinct cultural problems:

- Difficulties in acknowledging different cultural perspectives resonated with participant E3 – “I see clashes of cultures ... Everyone is in prison; [there is a] whole fortress mentality ... there is no transparency and openness. [As a result] in some ways we’ve almost destroyed culture.”
- Ambiguity was expressed by participant M6: “[Leadership changes] created confusion. A lot of bewilderment and bemusement by our stakeholders”
- Lack of preparation for the change was cited as disconcerting by three managers. M1 noted “Frankly, there wasn’t much the organization did to prepare me for the change ... we didn’t do a very good job of marketing the change. People didn’t know why the change occurred, or what kinds of issues or concerns were being addressed by the change.” M3 stated “I never saw it coming.” M5 contributed “I think that it [the change] was rolled out before it was either fully formed or the communications plan was fully developed.”

### **Patterns and Themes**

In following Creswell (2007), Hatch (1997), and Saldana (2009), at least two predominant patterns (or themes) emerged from the descriptive coding. Those are depicted in Figure 8, below.

**FIGURE 8  
EMERGENT PATTERNS (THEMES)**



A further elaboration of each emergent theme follows:

*Theme 1*

This addresses the temporal, punctuation and communication categories. Giddens (1984) noted that time could be considered as reversible for institutions (e.g., organizations), primarily in the context of recursive scripts that reinforce agency interactions within a structure. For the PSO, time presents a conundrum: an asset from the standpoint of affecting more stability in culture, but also a liability in that some managers perceived it is taking too long to settle. As participant M6 noted:

“I just didn’t think we’d be in such a state of turmoil at this stage of the game. Time takes care of things, but how much time? What’s an acceptable period of time?”

“Culture change requires the counterbalance of stability” (Hatch, 2011, p. 352). Shocks to the system recall stress indicators alluded to by Meyerson (1994). These unanticipated events have confused organizational identity, for both internal members and stakeholders. The confusion is confounded by a perception of incongruence between identity and culture (Albert & Whetten, 1985; Hatch, 2011; Whetten, 2006). Wry, Lounsbury and Glynn (2011) propositioned that an emergent, unified identity is more likely to be legitimized when consistent stories are told. PSO has not yet achieved this legitimacy.

*Theme 2*

This addresses morale, perception and leadership categories. DiMaggio (1997) discussed the importance of considering cognition in the context of culture. In addition, however, the results of this study appear to suggest that affect, not just cognition, is important when effecting cultural change. Affect clearly resonated with perceptions of poor morale, perception and (mostly) uncertain trust of leadership. Some managers and executives cannot tell whether the CEO wants a corporate culture or if culture is a variable to be managed (Smircich, 1983). The CEO decree on cultural change recalled Denison and Mishra (1995): PSO is analogous to Detroit Edison, which was controlled by engineers and a forced integration cultural change was “*done to* [emphasis added] the organization” (p. 211). The PSO CEO would be well-served to not attempt imposing an integration perspective – in which uniform consensus exists – onto the entire organization (Martin, 2002).

**IMPLICATIONS**

Implications for learning scholars and practitioners are provided in the narrative that follows. An abbreviated version of these implications may also be found in Rude (2013).

## For Learning Scholars

Several implications for learning scholars as regards the successful alignment between new leaders and legacy organizational culture surface, as described below.

- Hartmann and Khademian (2010) noted that research associating leadership with organizational culture has become passé. While this paper is not focused on the reasons behind this perceived decline of research interest, scholars should re-engage given the veneer that surrounds culture's depth and breadth. Perhaps, learning scholars should consider the Burrell and Morgan (1979) theoretical paradigms: for instance, leadership acts may be viewed in objective terms, whereas cultural perceptions may be viewed in subjective terms. The expanded cultural perspective offered in this manuscript contains both objective ("tangible artifacts") and subjective ("express sanctioning by employees") hues. The objective: subjective chasm vis-à-vis the new leader: organizational culture dynamic may be an interesting research venue.
- Schein (1996) and Martin (2002) both acknowledge sub-cultures. Learning scholars would be well-served by avoiding the possible temptation to equate the term *organizational culture* with the Martin (2002) term *integration perspective of culture*. Martin (2002) cautioned about the permeability of cultural boundaries, which logically would hold true for sub-cultures as well. Schein (1996) offered a discourse on operator, engineer and executive sub-cultures; the latter two of which are pre-disposed to seeing employees as commodities. For executives in particular, Schein (1996) noted that as the leader rises through the ranks, they can have a predilection towards losing the human connection vital in previous roles (e.g., when a first-line supervisor), in favor of a business acumen focus. Thus, learning scholars should advance research exploring how C-suite leaders can effectively approach inculcating organizational culture change in light of their relationship with apparent sub-cultures.
- Another research domain for learning scholars is the extent to which leaders are included by employees into the organization's social fabric. Drawing on Van Maanen and Schein (1979), leaders can vacillate between the outer periphery and the inner core. Of key concern to leadership research is that a leader's position on the inclusionary spectrum is a function of his or her value as perceived by the employees. Moving towards the inclusion center is tantamount to employee acceptance which is predicated on the perception that the leaders and employees share assumptions on what is or is not important to the organization. A research perspective emanating from this study is that employees hold considerable power in deciding whether and to what extent leaders will be integrated and socialized into the organization. Therefore, reinvigorating Van Maanen and Schein's (1979) work into contemporary organizational milieus would benefit learning scholarship. Empirical research, using both quantitative and qualitative methods, would heighten an understanding of how leaders can be better equipped to successfully navigate through organizational culture dynamics and complexities.
- Public sector-specific research opportunities exist. Public sector institutions have a natural tendency to focus on meeting constituent needs. Given their constituency focus, public institutions would be well served to take an inclusive stance towards cultural issues, bringing in multiple perspectives to address myriad and diverse interests. "Who is included or excluded will determine to a considerable extent the content of a cultural portrait" (Martin, 2002, p. 325). Geographically dispersed public sector institutions need to consider organizational and adjacent societal culture(s) alignment (Martin, 2002). Lastly, subcultures need not be considered as mutually exclusive: rather, Martin (2002) suggested that subcultures can overlap, thereby preserving commonalities and differences. The public sector is by no means immune to the sub-culture phenomenon.
- Learning scholars can capitalize on the relative lack of research amalgamating leadership, organizational culture and the public sector. Using the Albert and Whetten (1985) organizational identity model, many public sector organizations would be categorized as normative. If, however,

a new leader with cultural change inclinations comes from a utilitarian background, cultural and identity issues may emerge (Albert & Whetten, 1985).

- Piderit (2000) notes that we should retire the phrase "resistance to change" and advocate a multidimensional approach that focus on attitudes. In order to accomplish this transition, she outlined five key implications for research which this manuscript advocates may help to bridge the new leader and organizational culture chasm.
  1. A multidimensional view of employee responses that can predict employee behaviours in response to planned cultural change. By emphasizing shared values, employees can be included in the change efforts and their responses can be more predictable. Learning scholars should become conversant in cultural dynamics and in assessing their own organization's culture.
  2. Investigate the positive and negative effects of ambivalence. Piderit noted that ambivalence can provide a basis for motivating new action. Leaders should engage and energize employees through focused effort. Employee engagement requires entropy (Shuck & Herd, 2011).
  3. Focus on change "managed in emergent and democratic ways" (Piderit, 2000, p. 791). As noted in Theme 1 above, culture demands open, transparent communication.
  4. Learn how to better manage change efforts. There is a wide array of change research available (e.g., Orton & Weick, 1990), and scholars should appreciate how change is an essential component of the learning discipline.
  5. Embrace qualitative research, especially as regards culture. Use relevant methods including purposeful selection, interviews and symbolic representations such as drawing (Hatch, 2011). These types of inquiry and methods will help leaders discern and understand employee perspectives, feelings and concerns.

### **For Learning Practitioners**

Leaders need learning practitioner guidance and expertise, in the following ways:

- Acculturate new leaders. In this manner, acculturation is not just a training course (although, it is contended that any orientation course should include substantive content on the culture). As part of an indoctrination program, learning practitioners should orient new leaders (and all new employees, for that matter) on traditions, norms, values and how the work gets done (Martin, 2002). Learning practitioners are encouraged to consider robust acculturation opportunities for new leaders, so that they understand the conventions and ideologies that preceded their arrival.
- Trust and credibility influence the leader's capacity and ability to shape cultivate organizational culture (Dull, 2010). Learning practitioners should encourage leaders to demonstrate their capability and build trust before embarking on widespread cultural change efforts.
- Partner with new executives to help understand their personal vision, mission-related agendas. As important, help those executives imagine what a dream organization looks like. What culture is needed to support that ideal? How does that align with the current *modus operandi*?
- Acclimate to the various cultural instruments that exist to help shape and inform the leader's vision. Leaders need practitioner counsel to illuminate their thinking on the art of the possible. Leaders should focus on how to *first* perceive and *then* engage culture. This can be done by communicating a leadership philosophy and conducting an organizational assessment (Hartmann & Khademian, 2010). In so doing, leaders should be aware of their own cultural perspective tendencies and then study the other perspectives in order to learn how those perspectives manifest within that organization (Martin, 2002).
- There appears to be an inverse relationship in (a) the speed of change for power, strategy, and structure and (b) the speed of change for culture. Learning practitioners should urge leaders to take small, incremental steps in cultural adjustments (Hatch, 2011). New leaders should balance

their robust change agenda with the equally legitimate imperative to first understand the organization's culture.

- The role of affect should be promoted, not suppressed. Leaders can model affective behaviour; for example, by sharing their own emotions with employees. Learning practitioners can help develop in leaders the requisite skills to publicly empathize and otherwise feel emotions that employees may be covertly harbouring.
- Using Schein (2010) as a springboard, the author suggests seven steps for creating a psychological safety net that learning practitioners can promote for leaders trying to manage cultural change:
  1. A compelling positive vision – this requires learning practitioners to work with the leader in answering questions such as: What is the business case for employees for the change? Why would they be better off as a result of the change? Is it really the culture that needs changing, or a different specific problem? What problem are you trying to solve? Why do these problems appear to exist? According to whom?
  2. Formal training – what new skills are required to make the change successful?
  3. Involvement of the learners (employees) – How can employees learn the cultural change in a way that works for them?
  4. Practice, coaching and feedback – How can leaders provide an environment in which mistakes or failures are acceptable?
  5. Positive role models – How can leaders demonstrate and model desired cultural behaviours? In what ways can leaders show their humility? What does success look like?
  6. Networks – to whom can learners converse without fear of reprisal? What types of peer-to-peer learning are leaders making available?
  7. Reinforcements – how are leaders codifying the cultural change so that it achieves a higher order of acceptance (i.e., moving from visible artifacts to the meaning that employees attribute to those artifacts, per Hatch (1993))?

## LIMITATIONS

The following limitations are acknowledged, and others likely exist:

- Although senior leaders were interviewed for this case study, the CEO was not interviewed. This was intentional, for purposes of discerning the influence that existing employees possess in an organizational culture context. However, gaining the CEO's perspective would have added another dimension to the research.
- This was a case study at a point in time, specifically, during the leader's nascent phase into the PSO. A longitudinal case study or ethnography (Creswell, 2007) would have contributed additional insights in terms of the leader's effectiveness in changing or managing the culture. Additionally, a longitudinal or ethnographic study would have thickened the PSO's cultural description (Geertz, 1973).
- A comparative case study (Creswell, 2007) might have lent further insights in terms of comparing leadership and cultural dynamics across multiple organizations, be they all within the public sector or comparing public and private sector entities.
- A qualitative research method such as the one used herein allows for a greater understanding and discovery of a phenomenon – in this manuscript, understanding how culture influences new leaders as well as the employee's perspectives as regards the leader. Qualitative studies are not typically intended to be generalizable beyond the scope of the research. Therefore, while the implications section of this manuscript may provide reasonable face validity (Maxwell, 2005), the lack of robust quantitative research is a limitation from a generalizability standpoint. The use of validated organizational culture models (e.g., Denison, Janovics, Young, & Cho, 2006) would



further strengthen change efforts as well as the requisite sanctioning needed in accordance with the new definition of culture proposed in this manuscript.

## CONCLUSION

This study explored the dynamic of leaders new to an organizational culture setting. Using the PSO as a research site while it is in the throes of undergoing a series of cultural changes generated some noteworthy findings. Themes indicate that building trust and leveraging the role of affect are needed. To that end, within the PSO it appears that the leader's change efforts are not yet aligned with the change agents who have codified the PSO's cultural essence. The temporal nature of culture can be a strength or hindrance but, as Schein (1992) noted, is dependent upon leadership to provide desired direction. Hatch (2011) issued cautionary remarks that seem particularly salient for the PSO leadership: "hyperadaptation risks cultural degeneration when actions diverge from values" (p. 354). In the extreme, promoting radical change and discarding the status quo can confuse followers, create paranoia, and question leader motives (Kouzes & Posner, 1987). An incremental approach should be used to produce enduring yet differentiated cultures. Learning as a discipline should capitalize on these opportunities by demonstrating its value in solving leadership and cultural friction.

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**APPENDIX A**  
**EXPLANATION OF HATCH (1993)**  
**ORGANIZATIONAL CULTURE DYNAMICS MODEL**

Table A1  
*Hatch (1993) Organizational Culture Dynamics Model*

<b>Process</b>	<b>Definition</b>	
<b>Manifestation</b>	Any process by which an essence reveals itself, through the senses, cognition and emotion. Manifestations permit cultural assumptions to reveal themselves to organizational members. Translates intangible assumptions into recognizable values.	
	<b>Modes</b>	<b>Definition</b>
	Proactive	Assumptions provide expectations that influence perceptions, thoughts and feelings – and are capable of organizing action and experience.
	Retroactive	Retroactively maintain or alter existing assumptions. In maintenance, values and assumptions are harmonious. Altered assumptions could produce random variance or innovation.
	<b>How to Study</b>	How organizational expectations come about. An imaginative act in which an expectation of a situation and its potential is produced via cognitions, emotions, and perceptions grounded in cultural assumptions.
<b>Realization</b>	<b>Definition</b>	
	Making something real (not pretended or merely imagined), to bring it into being.	
	<b>Modes</b>	<b>Definition</b>
	Proactive	Transforms values into artifacts (e.g., rites, rituals, stories). Related to Weick’s notion of enactment and materialization of ideas.
	Retroactive	Recognizes post hoc contribution of artifacts to values and to expectations of “how things should be”. These contributions can either reinforce the value system or could introduce artifacts that challenge values and expectations.
<b>How to Study</b>	How values and expectations are used and maintained or transformed in the course of constructing behavior that has tangible outcomes.	
<b>Symbolization</b>	<b>Definition</b>	
	The ways in which physical forms are produced and used by organizational members (e.g., giving flowers to someone: the symbol is the flower, but symbolization is the gesture of appreciation. Symbolization combines an artifact with meaning that reaches beyond or surrounds it.	
	<b>Modes</b>	<b>Definition</b>
	Prospective	Experiencing objective forms shift to an awareness of things as having both literal and surplus meaning. (surplus = full meaning less literal meaning; e.g., what the flowers mean less the flower itself)
	Retrospective	Enhances the awareness of the literal meaning of the symbolized artifacts. Not all artifacts are given equal treatment within the symbolic field. Does someone’s desk attain greater meaning based on whose desk it is?
<b>How to Study</b>	Studying symbolization calls for direct involvement. Requires adaptation of aesthetic techniques (e.g., acting, writing, drawing, photography) to the study of organizations.	

<b>Interpretation</b>	<b>Definition</b>	
	The meaning of an experience. Two aspects: altered understanding of symbolic meaning via retrospective interpretation and revisions to cultural assumptions via prospective interpretation. Per Wilson, “we develop an account in a hermeneutic fashion, forming ideas about overall patterns on the basis of particular events, and then using these same ideas to understand more clearly the particular events that gave rise to them”.	
	<b>How to Study</b>	Investigating how symbols mold and are molded by existing ways of understanding. Typically uses ethnography.

Note: Adapted from “The Dynamics of Organizational Culture” by M.J. Hatch, *Academy of Management Review*, 1993, pp. 657-683. Copyright 1993 by the Academy of Management.