

**AN ANALYSIS OF ORGANIZATIONAL CULTURE, SUBCULTURES AND
PERSONAL VALUES IN A MULTIGENERATIONAL RURAL FAMILY
ENTERPRISE**

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Introduction

It is now axiomatic that organizational culture can be associated with several dimensions of superior organizational performance. At least since Kotter and Heskett's (1992) classic study on culture and performance confirmed that for organizations in general, a positive culture is associated with financial returns and stock prices around double those of firms with dysfunctional cultures it has been widely accepted that culture can leverage results. More recent studies have reinforced this perspective, especially in the service industries (Belay et al., 2023; Bhuiyan et al., 2020; Carvalho & Vergara, 2002; Larentis et al., 2018; O'Reilly III et al., 2014; Petriglieri et al., 2019; Sorenson, 2002). The deeper and more daunting question, however, is whether and how culture can be managed or at least influenced in the direction of superior performance (Akin & Hopelain, 1986). Some authors and many practitioners are optimistic about the prospects for optimizing culture (Cameron & Quinn, 2011) while others are agnostic or pessimistic (Bogale & Debela, 2024; Guterman 2023; Mayberry, 2023; Pozzer & Minello, 2019; Schein 1983, 2010). This poses challenges for managers and practitioners who work on culture with the objective of rendering organizations more humane and effective. These challenges are compounded by the very different ontological and epistemological views of organizational culture that exist (Belias & Koustelios, 2014; Kristof Brown et al., 2023; Lee, Kim, & Park, 2015; Lucas & Kline, 2008; O'Reilly III et al., 2014). The purpose of the present paper to describe aspects of an action research project which attempts to use different perspectives on organizational culture and its etiology to illuminate and orient efforts to enhance organizational development and performance. Specifically we use multidimensional quantitative data from a third generation Brazilian family firm in the interior of Goias to reflect on the origins and nature of its organizational culture and subcultures and on their implications for culture change and management. We posed a general research question to orient the project: What are the major forces influencing the development of organizational culture and subcultures in this specific organizational setting and what are some implications of these forces for organizational development and health across time.

Different Views of Culture and How Their Implications for the Study and Management of Organizations

There are almost as many definitions and approaches to culture as there are people studying it, so to facilitate communication and explain why we adopted certain research and analytic strategies it will be useful first to identify some of the different ways of looking at organizational culture (Bogale & Debela, 2024; Dauber et al., 2012; Guterman, 2023; Sackmann, 1997; Schneider, 1987). Three general perspectives, the *integration approach*, the *differentiation approach*, and the *fragmentation approach* summarize the best known views on organizational culture.

The Integration Perspective on organizational culture, which was the first perspective to appear, assumes that organizations typically have one dominant culture which is heavily influenced and manageable by formal leadership figures (two popular examples of the integration perspective are Collins & Porras (2000) and Kotter & Heskett (1992)). In this view, change in the organization is top down and is normally the result of conscious reorientation by top leadership (Bagga, Gera, & Haque, 2022; Berson, Oreg, & Dvir, 2008; Foti & Hauenstein, 2007; Jerom, 2013; Kim et al., 2022; O'Reilly III et al., 2014). The environment does not impinge directly on the workings of the organization except as it is apprehended and interpreted by the leadership and incorporated into their vision. Commitment, consensus, and consistency are hallmarks of organizations with strong and healthy cultures, dissidents are few, and subcultures, if they exist, are weak and of little importance (Baird et al., 2018; Dennison, 1990; Kristof, 1996; Ouchi, 1975; Wilkins & Ouchi, 1983). For these reasons, unless the organization is young and dominated by a charismatic founder, the integration view sees organizational culture as a largely conservative force (Kim et al. 2022; Tomczyk et al., 2012; Trice & Beyer, 1993). Schein's (1983; 2010) pioneering work on leadership and organizational culture also operates under most of the assumptions of the integration approach although its early origin and broad approach tends to defy clear classification.

The integration perspective's expectation of homogeneity, conservatism, and leader dominance is supported and explicated in important ways by social identity theory. The social identity perspective argues that, for both cognitive and affective (particularly self-esteem) reasons, people seek to discover and establish their identity through membership in groups (Bogale & Debela, 2024; Jerom, 2013; Turner, 1991). The nature of these groups is constructed to a large degree by identifying "prototypes" or idealized representations of the characteristics of group members (Hogg, 2001; Porac et al., 1989; Schwartz, 1999; Srivastava et al., 2018; Turner, 1991).

The Differentiation Perspective. Another classic approach to organizational culture supports quite different if not dramatically opposed predictions about how cultures function and adapt. The differentiation perspective on organizational culture is much more attuned to dissensus, conflict, and competition between different subcultural forces and sees these forces as penetrating the organization directly from the environment, independent of any managerial efforts to channel or mediate or interpret their impact (Abrahamson & Fombrun, 1994; Boisot & Child, 1996; Garibaldi de Hilal, 2006; Guillén, 2001; House et al., 2004; Jerimier et al., 1991; Martin, 1992, 2002). Adaptation of the organization's culture to the environment comes principally through the struggle for dominance between opposing or competing subcultural tendencies (Yinger, 1982). Those emphasizing differentiation in organizational cultures would likely agree with social identity theorists that human groups create and maintain meaning and order by developing mental prototypes based on the contrast between in-groups and out-groups, but they would likely be much less optimistic about the ability of leaders to maintain homogeneity and consensus within an organizational system and to confine dissent and deviance to small and impotent subcultures (Trice, 1993; Trice & Beyer, 1993; Tsui, 2007).

This view is not inconsistent with the observations of some anthropologists, most notably Jeremy Boissevain (1974) and Lévi-Strauss (1963), who have noted the tendency of human systems toward "reciprocal opposition"—the division of a larger collective into

two opposing subcultural groupings or factions whose values are mirror images of one another and which are frequently similar in size if not in influence. In modern capitalist organizations we might expect the values of these oppositional groupings to reflect the tension between centralization, efficiency and cost containment versus flexibility, creativity, and risk taking that are reflected in the contrast between threat-rigidity and organizational learning schools, as well as in other perspectives such as March's (1991) exploitation versus exploitation, Quinn's (1988) competing values framework, and Kakabadse and Korac-Kakabadse's (1999) Vertical and Horizontal strategies and less directly, Argyris and Schon's (1978) single and double loop learning.

Those adopting this view of culture will tolerate and even encourage a fair amount of conflict and competition in the organization but you may have some difficulty getting to switch gears and support a sense of vision and destiny.

The Fragmentation Perspective. Depending on the definition and operationalization of the construct, some authors find culture and even personal identity so mutable and subdivided that they despair of identifying any stable and predictable pattern of values in organizations (Alvesson, 2002; Bloor & Dawson, 1994; Ellis et al., 2006; Garg & Sackman, 1997; Hofstede et al., 2010; Sangwan, 2021; Turner, 1986). For these "fragmentation" scholars, temporary alliances around sort lived agendas or issues using vocabulary and symbols that have different meanings for each actor involved provide whatever ephemeral cultural meaning may be found in an organization. For fragmentation scholars culture has "no specific point of origin" (Martin, 2002) and power is broadly distributed within the organization (Kubo, et. al., 2015; Robertson and Swan, 2003).

The fragmentation view is somewhat difficult to apply to the managerial concerns of organizations. If organizational cultures are as ambiguous and ephemeral as the fragmentation view suggests, subcultural groupings would be many, and their composition generally unrelated to organizational criteria like hierarchy, department, tenure or to demographic criteria like age or gender. Neither would it be expected that the environment would greatly influence or decrease the number, cohesion, or ideological content of subcultural groupings.

The Emic Approach. Organizations are Idiosyncratic. Much of the work on organizational culture was developed by scholars of an ethnographic or "emic" orientation who begin their studies by trying to forget prior knowledge and theories and understand cultures from the perspective of those who live in them (Alvesson, 2002; Schein, 2010; Trice and Beyer, 1993). As might be expected, their theories tend to be "grounded" (Athayde & Santos, 2019; Belias & Koustelios, 2014; Glaser & Strauss, 1967; Jermier et al., 1991; Lucas & Kline, 2008) in the direct experience and perspectives of members of the cultural system. While they might not disagree that nation or industry have impacts, they believe that study of external forces have limited utility in understanding cultures in a fundamental way (Gordon, 1991; Hofstede, 1980; Hofstede et al., 1990; O'Reilly et al., 1991). These would therefore expect that organizations, even within the same industry or country, might possess radically different cultures. This type of study (of which Fleury's (2009) work in Brazil is illustrative) is hard to generalize from because of its idiosyncratic, case based nature, but generates rich insights about the internal logics and dynamics of specific organizations and of specific issues and processes within individual organizations. We respect the emic approach tremendously

we are also aware of the efficiency and comparability that quantitative statistical comparisons grounded in normative population data offer and we will attempt to exploit these advantages in this research.

In the course of this paper we will make some reference to each of these perspectives for help in interpreting data and justifying the use of certain statistical and analytical strategies without any a priori expectations about the utility or validity of a given approach for this particular setting. Rather, we will use our results inductively to reflect on the trajectory of the firm studied and the implications of our results for both practical and theoretical dimensions of experience.

Without attempting to advance a priori hypotheses or do justice to the large and varied literatures that arose out of the perspectives summarized above, we offer research subquestions to be addressed if only in passing here.

1. To what degree are founder versus successor personal values associated with cultural or subcultural dynamics?
2. How is a multigenerational family firm culturally different from the general population of Brazilian firms from predominantly urban centers?
3. Do integration or differentiation perspectives best explain the greater proportion of variance in observed collective and personal values in the firm studied?
4. What do turnover [selection] patterns tell us about the culture in the firm studied and its potential for management and intervention?

These questions will be of interest to both practitioners and academics, but the major motivation for the project arose from more practical concerns of the major stakeholders which will be explained below.

Site and Methods

The Evolution of an Interior Dynasty

Given its immense geographical size and resources, Brazil and many other former colonies have experienced successive resource frontiers which have impacted the development of local economies and businesses in ways that have generally been neglected (Boyer, 1996; Bunker, 1984; Hickson & MacMillan, 1981; Kröger & Nygren, 2020; Williams, 1973) in traditional management thought and research. The research site reported here provides an opportunity to examine some of these dynamics and their possible cultural impacts that have yet to be considered. The March group (a pseudonym) had its origins in the experience of an Italian immigrant who found work in a small wood furniture factory in a small interior town (about 15,000 population at the time, now around 50,000) of Goiás during the 1950's. Mr. March prospered in his work, ultimately becoming a partner in the business. When construction work began on Brasília during the late 1950's he founded a sawmill which mostly produced rough cut lumber for the massive construction project some 600 km. distant. After the initial boom in demand cooled when Brasília was inaugurated, his daughter in law adapted by starting a construction materials business which, in addition to general construction needs supplied from national retailers, initially sold lumber from the sawmill until local timber stands were exhausted. In the early 1990s she expanded regionally founded a construction materials business in another interior town about 100 km distant and about double in

population (100,000). Around a decade later, her son became involved in the businesses and is projected to eventually take over all operations when his mother retires. He acquired two business franchises on his own; a made to order furniture business and a fast food franchise. The total group has grown to around 160 employees, but the bulk of employment remains concentrated in the two construction materials stores, the older one in the smaller town with about 41% of the total 160 employees and the store founded by the daughter with about 37%. This not atypical interior family group poses several attributes that make cultural study and intervention complex: three generations across two different geographically dispersed towns diverse founders, sizes, products, and personal influences. It offers a classic opportunity to confront quantitative methods and results with diverse social forces.

Four challenges common to this type of family enterprise motivated our data collection and interpretation methods: 1. The mother, who belongs to the firm's second generation, and the son and heir apparent who belongs to the third generation, have very different personal and management styles which pose both interpersonal challenges and questions about the strategic direction of the firm. 2. Like most organizations of this type, the acquisition and retention of personnel is a challenge. 3. The tensions involved in a multigenerational firm are compounded by differences between the internet generation and other associates. 4. There is a desire to maintain the positive aspects of the firm's historical legacy while remaining responsive to changes in the socioeconomic environment.

The conjunction of these real world problems and the broad and dissension literature on organizational culture means that no article length study can adequately speak to all of the theoretical and practical issues involved. Instead we will present a few easily digested highlights of what turned out to be a large, multifaceted data set, and ponder some of their implications for cultural and organizational development and enhancement.

Method

We used a quantitative inventory involving three interrelated dimensions to approach this study: An inventory of observed organizational culture, desired culture, and employee personal values all anchored in the same 16 variables. We used the Aggregate Value Profile was used to measure culture. The AVP is similar to other measures of organizational culture, but it has the advantage of having been designed with international comparative research in mind and the existence of modest normative data from Argentina, Brazil, India, the US, and more recently Singapore, Hong Kong, Taiwan, and Korea (Nelson, 1997; Nelson, Bass and Vance, 1995; Nelson and Gopalan 2003; Nelson, 2005, 2011). The AVP is similar to other quantitative measures of culture in that it focuses on values as an important dimension of culture (Chatman, 1989, 1991; Meglione, et. al. 1989; Quinn, 1988; Van Vianen, 2000). Value approaches to culture are limited insofar as they do not consider cognitive or symbolic aspects of culture, but they have excellent face validity and are easily understood by managers (Aldrich, 2012; Birnbaum et al., 1985; Duckworth, et al., 2007; Hampden Turner & Trompenaars 1993; Hueso et al., 2021; Jermier et al., 1991; Kerlinger & Lee 2000; Schein, 2010; Turner, 1986).

The AVP is similar to other value based quantitative instruments with the exception that it was originally developed by simultaneously using cross cultural samples and comparing personal and corporate values. Like almost all quantitative measures of culture, and like the classic leadership studies (Fiedler, 1967; Blake & Mouton, 1985; Hersey & Blanchard, 1988) the AVP contains a Task or Work Quadrant, and Relations or concern for persons quadrant. The AVP expands the work and relations quadrants by adding four subdimensions each. For work, it includes, Hard Work, Time or Deadlines, Finishing Tasks, and Quality. For relations, it includes Affect, Empathy, Sociability or group orientation and Loyalty. Two other quadrants, Control and Thought, are less dependent on American management thought and were informed by an extensive survey of anthropological and sociological literatures (Nelson and Gopalan, 2003). The Control quadrant deals with Dominance, Status, Politics, and Leadership. The Thought quadrant deals with Abstraction, Planning, Exposition, and Flexibility.

The AVP attempts to measure these 16 variables by ranking 20 sets of four statements like “In this organization good work is rewarded” or “Obeying rules is important in this organization”. For each of the 20 sets, the respondent assigns first, second, third and fourth places to each statement which results in each of the 16 dimensions being confronted with each other dimension exactly once. The resulting response vector has a sum of 200 and each dimension can range from 5 to 20. The ipsative nature of the instrument precludes evaluation using traditional factor analytic techniques (Closs, 1996; Dunlap and Cornwell, 1994) and interitem reliabilities for scales must use monte carlo, or enumerative variance estimation techniques to compensate for negative mean intercorrelations. Using alternative reliability computations, scale reliabilities vary from .6 to .9. Test-retest reliabilities using a testing interval of one month have proven acceptable, ranging from .5 to .9 with average correlations around .7. Predictive validity using seniority, hierarchical level, organization, and other variables of interest is high and well established (Nelson & Loureiro, 1996). The AVP is similar to other quantitative measures of culture in that it focuses on values as an important dimension of culture (Bogale & Debela, 2024; Chatman, 1991; Chatman & Jehn, 1994; Dauber, et. al. 2012; Meglione, et. al. 1989; Quinn, 1988; Van Vianen, 2000). Value approaches to culture are limited insofar as they do not consider cognitive or symbolic aspects of culture, but they have excellent face validity and are easily understood by managers (Schein, 2010; Turner, 1986). Included in the data collected in this project was the Personal Value Profile, which we use extensively here to relate personal inclinations as both a cause and effect of culture per attraction, selection and attrition theory and person-organization fit literatures (Ros et. al., 1999; Schneider, 1987; Van Vianen, 2000). These theories assert that persons move into, stay or leave organizations because of isomorphism in personal and collective inclinations, leading to institutional and individual homogeneity over time. In the course of this research we will observe that degree to which person-organization isomorphism and strain are found in within and between subcultural dimensions has deep theoretical and practical implications.

The vast differences in theories of organizational culture described above foreclose any attempt at formal hypothesis testing in this kind of research. There are however, some quantitative analytical strategies and techniques that permit us to introduce a degree of logic and rigor into our inquiry. Particularly the use of normative data and variance based

cluster analyses to complement variance limiting analyses of central tendency like ANOVAS or regressions.

Unless one subscribes completely to the emic perspective-- and most would agree that reliance on any one theoretical perspective on culture has big limitations — one of the first things to do when collecting quantitative data is compare it to similar organizations to you have some idea of whether firm varies from competitors in a positive way. Below we present these results but before, it will be useful to examine the personal values of the matriarch of the second generation matriarch, her son, and mean values of a sample of 25,000 respondents from the Brazilian population.

Echoes of Edgar Schein: Founder Values versus Organizational Culture

One of the thorny issues faced by family firms arises from the distinct personalities of members arising from both changes in the cultural context over time and individual variations of personality. Schein's classic work stresses the imprinting of the original founder on the culture, but does not deal with subsequent impacts of heirs over time. We did not have access to the personal value profile of the original founder (now deceased) but were able to secure those of the second generation mother and third generation son. The very considerable difference between the two profiles illustrates the difficulties of succession when strong individual differences are present. The population means in the left column shows who the two sets of personal values relate to the general population and suggest two very robust profiles heavily distinguished from the norm. The two profiles below contrast sharply, high loyalty, and low exposition and flexibility being the only common points. The other dimensions are massively different especially in empathy, sociability time, finish job, leadership and abstraction--- all variables with implications for managerial and administrative styles. The contrast between the mother and son's personal values was highly informative in identifying the personal forces underlying very different visions for the firm.

The contrast between values immediately raises the question of the influence of generational leadership on the culture of the firm. One very simple view of this very complex question is to compare the average scores on the 105 AVP instruments which records employee perceptions of culture at March Group with the means gathered from 400 respondents in a representative sample of diverse Brazilian firms. This result provides two possible insights: 1. The degree to which March Group has a culture that is distinguished from that of other firms 2. The association between the leader of the second and third generations and the culture of the firm.

As we examine these results in Table 1, we can divine some possible influence of the second generation matriarch — small but significant higher levels of Affect, Empathy, and Dominance, and lower levels of Leadership and Abstraction—all consistent with her unusual combination of values compared to the population at large. By contrast, her son's values, with their high contrast with his mother's values, are associated only high the high time orientation, suggesting little overall impact. Both mother and son are low in Abstraction and Exposition as is the culture in general compared to the overall Brazilian firm sample. The other significant differences from the population of firm cultures, a high time score (14.9 vs. 13.6) Quality score of 13.6 compared to 15 for the population finds no clear parallel in either personal value profile.

Among other practical insights, there are at least two practical implications we took away from the comparison of family personal values compared to the general population. First, the matriarch apparently had a much greater impact on the overall culture of the firm, at least if we assume with the integration perspective that the unitary cultural perspective is of importance. Hence her role as an agent and conduit of culture should be taken seriously and her support and cultural capital will be central to any effort to strengthen, reformulate, or weaken the culture. Second the third generation heir cannot successfully intervene in the culture unilaterally, except perhaps to weaken existing values by marginalizing the matriarch. The matriarch has been in place for a longer time, so it is possible that the third generation heir may yet have a similar impact, but we cannot tell at the moment.

Table 1: Personal Values of Second Generation Matriarch and Son compared to Brazilian Population Means

Personal Value Profile (PVP)	Son	Matriarch	Population (25000)
Hard Work	14	12	13,8
Time	17	8	12,1
Finish Job	17	9	11,1
Goog Work	14	18	14,8
Affect	12	19	13,3
Empathy	7	16	14,7
Sociability	7	12	14,1
Loyalty	14	15	15,8
Dominance	12	16	12,5
Status	12	15	10,3
Politics	8	14	10,5
Leadership	16	7	11,9
Abstraction	14	9	12,2
Plan-Org.	15	13	11,5
Exposition	9	8	11,2
Tol. Ambiguity	9	9	10,4

By comparing the Real Culture and Ideal Culture Columns of Table 2 we can see the degree and direction in which the employees of the Group would like to see the culture enhanced. By including the Personal Values Column, it is possible to consider how the personal values of employees related to the culture of the organization, but space will not discuss of this particular calculation. We see here that the employees' desired culture favors more work and less time emphasis, greater affect and empathy, mores loyalty, less dominance, status and negotiation, as well as less exposition and flexibility. These perceived gaps between real and ideal cultures can in turn help the family heirs ponder how their personal values relate to the desired culture of employees. In the case of the matriarch for instance, we see that her affect and empathy values are consistent with employee aspirations, but her dominance is not. Turning to the third generation heir, we see that his high leadership and planning values are not a source of discomfort or aspiration for employees and his de-emphasis on negotiation and politics are consistent.

Table 2: Real Culture Perceptions March Group Versus Population Sample

Real Culture	March Group (n=107)	Sd.	Companies (n=60)	Sd.	Diference Group x Companies	Probability
Hard Work	13.47	3.06	13.07	3.07	0.40	0.2257
Time	14.96	2.24	13.59	2.90	1.37	0.0000
Finish Job	13.87	2.24	13.76	2.29	0.11	0.6521
Goog Work	13.68	2.63	14.92	2.90	-1.24	0.0000
Affect	12.70	4.51	12.31	3.71	0.39	0.4048
Empathy	13.92	3.55	13.31	3.67	0.61	0.1120
Sociability	14.59	2.74	13.95	2.83	0.64	0.0321
Loyalty	14.44	3.51	14.16	3.76	0.28	0.4616
Dominance	13.01	2.81	11.89	3.75	1.12	0.0006
Status	10.88	3.26	10.07	3.57	0.81	0.0234
Politics	10.63	3.18	10.89	3.73	-0.26	0.4537
Leadership	12.22	3.28	12.87	3.26	-0.64	0.0680
Abstraction	11.39	2.63	12.09	2.88	-0.69	0.0164
Plan-Org.	10.51	2.68	11.42	3.01	-0.90	0.0024
Exposition	10.15	3.12	11.27	3.04	-1.12	0.0010
Tol. Ambiguity	9.58	3.16	10.44	2.96	-0.86	0.0105
Ideal Culture	March Group (n=107)	Sd.	Companies (n=60)	Sd.	Diference Group x Companies	Probability
Hard Work	15.62	1.95	14.56	2.58	1.06	0.0000
Time	13.93	2.38	12.83	2.66	1.10	0.0000
Finish Job	14.05	2.06	14.29	1.96	-0.25	0.2612
Goog Work	14.15	2.16	15.07	2.48	-0.92	0.0001
Affect	14.75	4.32	13.40	3.70	1.35	0.0032
Empathy	16.57	2.62	15.73	2.95	0.84	0.0040
Sociability	15.25	2.49	14.46	2.28	0.79	0.0029
Loyalty	15.36	3.04	14.30	3.73	1.06	0.0020
Dominance	11.25	2.26	9.69	2.90	1.56	0.0000
Status	8.79	2.41	7.45	2.29	1.34	0.0000
Politics	8.96	2.05	8.85	2.25	0.11	0.6155
Leadership	12.21	3.58	13.69	3.53	-1.47	0.0002
Abstraction	10.53	2.50	11.91	2.89	-1.38	0.0000
Plan-Org.	10.36	3.17	12.33	3.12	-1.97	0.0000
Exposition	9.39	3.05	10.83	2.97	-1.44	0.0000
Tol. Ambiguity	8.83	3.07	10.62	3.08	-1.78	0.0000
Personal Value Profile(PVP)	March Group (n=80)	Sd.	Population (n=25,000)	Sd.	Diference Group x Population	Probability
Hard Work	14.73	2.72	13.98	3.07	0.74	0.0132
Time	15.00	2.86	12.70	3.70	2.30	0.0000
Finish Job	12.96	2.59	11.67	2.98	1.29	0.0000
Goog Work	15.44	2.16	15.15	2.61	0.29	0.2328
Affect	11.3	4.43	12.03	4.01	-0.73	0.1189
Empathy	13.73	3.56	14.29	3.38	-0.57	0.1354
Sociability	14.50	3.21	14.22	3.29	0.28	0.4171
Loyalty	14.36	2.96	15.25	2.89	-0.89	0.0054
Dominance	12.35	2.23	12.26	2.53	0.09	0.7131
Status	10.16	2.21	10.07	2.50	0.09	0.7027
Politics	10.55	2.34	10.44	2.64	0.11	0.6675
Leadership	11.08	3.45	12.02	3.39	-0.95	0.0110
Abstraction	11.15	2.60	12.08	3.09	-0.93	0.0014
Plan-Org.	12.28	2.96	12.01	2.80	0.27	0.3989
Exposition	10.50	3.05	11.23	2.93	-0.73	0.0255
Tol. Ambiguity	9.93	2.68	10.60	2.66	-0.67	0.0192

Ultimately the culture of a profit making business must be aligned with a strategy that serves the needs of society, but a critical reflection on the values of influential family stakeholders may be useful in preserving a family legacy, and understanding the perceptions and desires of family members as they relate to those of employees.

Another partition of the data collected provides another practical issue connected to the personal values of the matriarch and son as they relate to the development and management of the group's culture.

Considering Subcultural Forces at the Formal Unit Level

Our first set of results consider individual leader impacts on organizational culture as a unitary phenomenon. In this organization however, the simple integration approach is limiting among other reasons because the organization in question has two major units in different locations founded at different historical moments by different persons. This raises the possibility that individual founder differences are amplified or moderated by powerful macro forces that need to be taken into account. These considerations provoked a different partition and analysis of the data which provided a more fine grained set of results and implications.

Table three divides the March group results into two parts representing the original location started by the first generation founder in the 1950s (Store M) with the second store founded by the second generation matriarch 40 years later in a larger town some 100 km distant (Store J). A third column maintains the earlier normative data from 60 Brazilian firms for comparison sake. Panels 2 and three of Table three contain the same partition of data (Stores M and J) the except that the statistics are calculated from the Ideal Culture version of the AVP and from the personal Values (PVP) of the employees of the two stores, again compared to our population sample of 60 firms and 25,000 Brazilians for the personal values. This increase in the scope of our data to include desired culture and personal values permits a more sophisticated view of the forces at work in the group, providing practical as well as theoretical insights, especially in terms of the interaction between personal values, selection, retention, and the development and perpetuation of organizational culture. The table statistics include means, standard deviations and statistical significance probabilities generated from one way anovas of the three means.

The most notable result for us is the relative absence of significant differences in the perceptions of culture at the two stores despite the different age, location, and influence of the matriarch at Store J. Looking at the first panel of Table 3, there is only one statistically significant difference — perceptions of Status at Store M are substantially higher than at Store J (9.9 and J, 11.6 at M, $p=.007$). The status difference is statistically significantly and numerically large suggesting a genuine difference between the two stores, but it is only one dimension and does not appear to be an expression of the third generation heir's values which are lower in status than the matriarch's. The logical takeaway would be that at least on the surface, the overall group culture is reasonably homogenous.

Table3: Perceptions of Organizational Culture and Person Values of Employees at Two Locations Compared to those of 400 Employees from 60 Brazilian Firms.

Real Culture	Store J (n=42)	Sd.	Store M (n=63)	Sd.	Compa nies (n=60)	Sd.	Dif. (JxM)	Dif. (JxC)	Dif. (MxC)	Prob. (JxM)	Prob. (JxC)	Prob. (MxC)
Hard Work	13.64	2.88	13.17	3.07	13.07	3.07	0.47	0.57	0.11	0.4288	0.2273	0.7990
Time	14.74	2.18	15.16	2.29	13.59	2.90	-0.42	1.15	1.57	0.3449	0.0025	0.0000
Finish Job	13.90	2.09	13.83	2.38	13.76	2.29	0.08	0.14	0.06	0.8575	0.6729	0.8390
Goog Work	13.90	2.58	13.46	2.68	14.92	2.90	0.44	-1.02	-1.46	0.3968	0.0190	0.0001
Affect	12.55	4.76	12.94	4.36	12.31	3.71	-0.39	0.24	0.63	0.6727	0.7547	0.2798
Empathy	13.67	3.81	14.08	3.43	13.31	3.67	-0.41	0.36	0.77	0.5732	0.5586	0.0988
Sociability	14.60	2.72	14.63	2.80	13.95	2.83	-0.04	0.64	0.68	0.9425	0.1502	0.0725
Loyalty	14.86	2.94	14.17	3.87	14.16	3.76	0.68	0.70	0.02	0.3079	0.1561	0.9767
Dominance	13.10	3.10	13.05	2.56	11.89	3.75	0.05	1.21	1.16	0.9344	0.0213	0.0020
Status	9.90	3.11	11.62	3.20	10.07	3.57	-1.71	-0.16	1.55	0.0075	0.7490	0.0006
Politics	10.93	3.10	10.48	3.29	10.89	3.73	0.45	0.04	-0.41	0.4760	0.9389	0.3579
Leadership	12.64	3.41	11.78	3.07	12.87	3.26	0.87	-0.22	-1.09	0.1887	0.6831	0.0102
Abstraction	11.50	2.46	11.37	2.79	12.09	2.88	0.13	-0.59	-0.72	0.7949	0.1507	0.0581
Plan-Org.	10.71	2.81	10.32	2.60	11.42	3.01	0.40	-0.70	-1.10	0.4674	0.1299	0.0026
Exposition	10.05	3.15	10.22	3.17	11.27	3.04	-0.17	-1.22	-1.04	0.7822	0.0200	0.0157
Tol. Ambiguity	9.31	3.11	9.73	3.22	10.44	2.96	-0.42	-1.13	-0.71	0.5053	0.0275	0.0993
Ideal Culture	Store J (n=42)	Sd.	Store M (n=63)	Sd.	Compa nies (n=60)	Sd.	Dif. (JxM)	Dif. (JxC)	Dif. (MxC)	Prob. (JxM)	Prob. (JxC)	Prob. (MxC)
Hard Work	15.29	1.64	15.78	2.12	14.56	2.58	-0.49	0.73	1.22	0.1845	0.0117	0.0001
Time	13.79	2.25	14.02	2.50	12.83	2.66	-0.23	0.96	0.96	0.6247	0.0119	0.0007
Finish Job	14.67	2.04	13.52	1.88	14.29	1.96	1.14	0.37	-0.77	0.0048	0.2592	0.0032
Goog Work	14.45	2.62	13.84	1.71	15.07	2.48	0.61	-0.62	-1.23	0.1861	0.1460	0.0000
Affect	14.05	4.62	13.35	4.04	13.40	3.70	-1.30	0.65	1.95	0.1413	0.3790	0.0005
Empathy	16.36	2.70	16.78	2.56	15.73	2.95	-0.42	0.62	1.04	0.4270	0.1613	0.0036
Sociability	15.19	2.39	15.40	2.53	14.46	2.28	-0.21	0.73	0.94	0.6732	0.0628	0.0066
Loyalty	14.62	3.22	16.05	2.62	14.30	3.73	-1.43	0.32	1.75	0.0190	0.5462	0.0000
Dominance	11.50	2.16	11.19	2.28	9.69	2.90	0.31	1.81	1.50	0.4835	0.0000	0.0000
Status	8.43	2.30	9.08	2.49	7.45	2.29	-0.65	0.98	1.63	0.1725	0.0107	0.0000
Politics	8.83	1.91	9.02	2.16	8.85	2.25	-0.18	-0.02	0.17	0.6502	0.9558	0.5711
Leadership	12.50	3.78	11.90	3.45	13.69	3.53	0.60	-1.19	-1.78	0.4154	0.0557	0.0002
Abstraction	10.52	2.52	10.51	2.49	11.91	2.89	0.02	-1.39	-1.40	0.9747	0.0014	0.0001
Plan-Org.	11.00	3.15	9.90	3.17	12.33	3.12	1.10	-1.33	-2.42	0.0855	0.0118	0.0000
Exposition	9.64	3.31	9.14	2.88	10.83	2.97	0.50	-1.19	-1.69	0.4276	0.0295	0.0000
Tol. Ambiguity	9.17	2.88	8.52	3.20	10.62	3.08	0.64	-1.45	-2.09	0.2868	0.0031	0.0000
Personal Value Profile (PVP)	Store J (n=38)	Sd.	Store M (n=40)	Sd.	Populat ion (n=25,0 00)	Sd.	Dif. (JxM)	Dif. (JxP)	Dif. (MxP)	Prob. (JxM)	Prob. (JxP)	Prob. (MxP)
Hard Work	15.32	2.37	14.25	2.99	13.98	3.07	1.07	1.34	0.27	0.0843	0.0014	0.5709
Time	14.82	2.98	15.30	2.58	12.70	3.70	-0.48	2.21	2.60	0.4464	0.0001	0.0000
Finish Job	13.29	2.56	12.65	2.53	11.67	2.98	0.64	1.62	0.98	0.2704	0.0004	0.0189
Goog Work	15.61	1.91	15.18	2.38	15.15	2.61	0.43	0.46	0.03	0.3809	0.1509	0.9475
Affect	11.89	4.33	10.53	4.42	12.03	4.01	1.37	-0.14	-1.51	0.1709	0.8484	0.0376
Empathy	14.37	3.24	13.23	3.70	14.29	3.38	1.14	0.08	-1.07	0.1505	0.8824	0.0768
Sociability	14.68	3.25	14.58	3.04	14.22	3.29	0.11	0.46	0.35	0.8787	0.3843	0.04646
Loyalty	14.63	2.89	14.10	3.11	15.25	2.89	0.53	-0.62	-1.15	0.4365	0.1954	0.0247
Dominance	12.13	2.30	12.48	2.16	12.26	2.53	-0.34	-0.13	0.22	0.4997	0.7333	0.5331
Status	10.16	2.09	10.00	2.25	10.07	2.50	0.16	0.09	-0.07	0.7489	0.7968	0.8454
Politics	10.29	2.42	10.78	2.22	10.44	2.64	-0.49	-0.15	0.34	0.3594	0.7033	0.3473
Leadership	10.32	3.39	11.78	3.32	12.02	3.39	-1.46	-1.70	-0.24	0.0590	0.0038	0.6440
Abstraction	10.84	2.28	11.43	2.86	12.08	3.09	-0.58	-1.24	-0.65	0.3224	0.0019	0.1563
Plan-Org.	11.79	2.78	12.65	3.14	12.01	2.80	-0.86	-0.22	0.64	0.2038	0.6282	0.2056
Exposition	10.24	2.82	10.85	3.30	11.23	2.93	-0.61	-0.99	-0.38	0.3801	0.0368	0.4713
Tol. Ambiguity	9.63	2.61	10.25	2.79	10.60	2.66	-0.62	-0.97	-0.35	0.3154	0.0283	0.4326

There are, however, significant differences between the two locations when we look at their relation to the population of organizational cultures studied. Comparing the means of the two locations with the mean perceptions of the culture of the population, we observe that, especially judging from the anova probabilities in the last three columns Store M is more distant from the averages of the population, on several dimensions like Time (higher) Quality (lower) Status (higher) Leadership (lower) and Planning (lower) while Store J is rally closer to the population means.

As we proceed with our analysis, we find interesting variance in Desired Culture and the personal values of employees in the two locations, especially when we take into account their relation to the normative data from our external samples. Looking at panel 2 we observe that there are three statistically significant between the stores on desired culture, Finish Task, Loyalty, and Planning, and that store M's desired values are significantly different from those of the population of organizations on virtually all dimensions versus seven for Store J. This suggests again that Store M is more generally different from the general population of organizations. The origin of this differentiation and whether it is positive or negative are open questions at this point which we will consider in our discussion section.

Finally and, perhaps, most provocatively we note that in the third panel, containing the personal values of employees at stores J and M, there are some substantial differences that hark back to our observation of the differences in the values of the second generation matriarch and her son. Affect at J is a significant 11.8 versus 10.58 for M. Similarly empathy is 14.4 versus 13.2, fully consistent values of the matriarch and contrasting with those of the third generation heir. By contrast, planning at J is 11.8 versus 12.6 for M while there personal scores for planning is similar for both mother and son. Similarly leadership is higher among employees at J again; inconsistent with the matriarch's low value on leadership versus her son. We thus see that while perceptions of culture vary organization wide from those of other organizations, but are generally uniform across the two major stores (J and M), the desired culture varies substantially between stores, and the personal values of the employees of the two locations differ on several dimensions, suggesting that the two locations are attracting and retaining workforces with somewhat different values. Thus Store J attracts employees with more Hard Work, Affect and Empathy, and less Negotiation, Leadership, and Planning. When we compare these means to the values of our 25,000 plus Brazilian sample, we observe that the personal values found at store M are farther from the general population than those of Store J, just as the desired culture of store M is more distant from that of the population of 60 organizations sampled.

Discussion and Conclusions

Taken together these results portray a complex and multifaceted set of forces acting upon the cultural dynamics at the March Group. While our article can report only a small fraction of the data manipulations and analyses undertaken and the theoretical and practical implications considered, we will endeavor here to advance a few points that illustrate the interaction of data analyses with the theoretical and practical issues raise by this intervention project.

Space will permit neither an exhaustive discussion of the data thus far presented or other partitions and analyses that dig more deeply into subcultural elements of the March group and their etiology. Returning to the four points in the research agenda outlined in our introduction:

1. To what degree are founder versus successor personal values associated with cultural or subcultural dynamics? Although we were unable to measure the personal values of the deceased first generation founder, a comparison of the personal values of the second generation matriarch and founder of one of two major business units with those of her third generation son suggested a much stronger impact on perceptions culture for the entire organization on the part of the heir closer to the original founding and instrumental in the origination of a major business unit.
2. How is a multigenerational family firm from the interior culturally different from the general population of Brazilian firms from predominantly urban centers? Again our study design does not permit us to claim to positivistic causal assertions here, some of our results suggest intriguing possibilities for future research. The 400 plus perceptions of culture were collected mostly from firms in the megalopolis of the Rio-Sao Paulo while Store M is located in a town of around 70,000 founded in 1938 and store J in a town of around 100,000 founded in 1883. Given this sampling frame, coupled with the founding of Store M in the 1950s in a young town which grow quickly versus Store J in a larger 120 year old community founded in the 1990s, we wonder if the rather noteworthy divergence of Store M from the general population is not indicative of a more traditional frontier, isolated setting. Reviewing table 3, panels 1 and 2 we observe that Store M varies significantly in Real Culture on 5 of 16 dimensions versus only 1 dimension for Store J. For Desired Culture Store M varies significantly on 15 of 16 dimensions with values as low as .001 while Store J varies significantly on only 9 dimensions with much higher probabilities, indicating substantially greater deviation in employee cultural aspirations than Store J. Only on the personal values found I panel 3 are results more mixed with Store J higher on Work, Finish job, and lower on Leadership, Abstraction, and Flexibility—consistent with the founder’s personal values as seen above—and Store M lower on Affect, Empathy, and Loyalty and higher on Planning, more consistent with the third generation heir.
3. Do integration or differentiation perspectives best explain the greater proportion of variance in observed collective and personal values in the firm studied? As intimated in point 1, Anovas comparing Stores J and M revealed only one value out of 16 which varied significantly between the stores versus 5 values which different from the general sample of perceptions of organizational culture from 60 Brazilian firms — all of which were isomorphic with the personal values of the matriarch. This result suggest and least some homogeneity in the culture of the group. At the same time, analyses of desired culture and personal values indicated the presence of subcultural dynamics by store location. The differences conceivably bear some relation to centrifugal forces arising from age of the unit and size of the host community. These and other results beyond the scope of this paper suggest that at least for the organization studied here, this is not an issue of integration or differentiation at work but rather integration and differentiation at work.

4. What do selection patterns tell us about the culture in the firm studied and its potential for management and intervention? Like item three, our research involved many data analyses and independent variables that are beyond the modest scope of this paper. However, the partition of personal values found in panel 3 of Table three offer statistically significant results that suggest the existence of selection effects consistent with Attraction-Selection-Attrition theories applied to organizational culture formation. At Store J, founded by the second generation matriarch, Levels of Affect and Empathy are higher, and abstraction, lower than at store M, consistent with differences between the personal values of mother and son. There are also other significant differences (see Planning-Organization for example) not directly traceable to the personal values of the heirs. Also as discussed above, there are significant differences between the values of employees at each store and the general means of personal values drawn from over 25,000 personal value profiles from the Brazilian population. All of these results indicate the existence of selection mechanisms — more likely intuitive than formally rational — that are populating units of the March Group with a certain type of employee with certain value set which in turn will influence the culture, also intuitively, likely via the desired culture among other mechanisms.

Practical Insights from the Research Results and Process

We close with some practical implications arising from this intervention that in the future may be systematized and perfected with other experiences and research. First we have reason to believe that Schein's original observations about founders and organizational culture can be used fruitfully in the build settings where there is more than one founder or where successive generations contribute important leaders. The neglected question of multiple founders over time gains visibility and relevance in our case. It would appear that subsequent generations can have a robust influence on organizational culture especially if they have a long and influential tenure or originated new organizational units or significant initiatives.

Second, differences in the values of the dominant managerial coalition can benefit from systematic exploration and discussion as part of an effort to negotiate healthy governance and formulate effective strategy by having a clear view of a management team's or potential successors diverse personal values. Such reflection can be useful in avoiding groupthink and biases that can ultimately compromise the value of organizational culture as a unique asset.

Third, from our experience here and elsewhere it is clear that that organizational culture is not a simple extension of founder values. Our extensive fieldwork as indicated that even sole founders in the first generation do not simply recreate the organization in their own image. Several other factors appear to have been at work in our case including community size and history, unit age, geographic dispersion, and family dynamics. The more that decision makers understand these influences and their confluence, the better situated they will be to understand the dynamic constraints that impinge upon and foment organizational cultures and subcultures.

Fourth, in our experience, organizations do not explicitly take into account the personal values of job candidates during the selection process, yet it appears clear from this

intervention as well as other experiences and existing research (Chatman 1989) that the attraction, selection, and attrition of human resources are a significant effect and cause of cultural dynamics and merit significant and explicit attention in the formulation and execution of human resource policy and practice.

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