Edited by
Harald Askeland · Gry Espedal ·
Beate Jelstad Løvaas · Stephen Sirris

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Understanding Values Work

Institutional Perspectives in Organizations and Leadership

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Understanding Values Work in Organisations and Leadership

Harald Askeland, Gry Espedal, Beate Jelstad Løvaas and Stephen Sirris

Values are fundamental to organisations. Considered key determinants of attitudes, work behaviour and decision-making, values in organisations have emerged as a topic of growing interest among organisational scholars and practitioners. By signifying what is desirable or appropriate, values guide the choice of action. However, they do not offer precise or standardised prescriptions of actions. Organisations focusing on values work are in a better position to improve their practices and quality of services. We believe that values work serves to bridge everyday practices with the organisational purpose.

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Work on values in organisations also assumes significance in the light of the contexts in which organisations operate. Organisations are part of a broad and heterogeneous institutional environment. Market, regulations and laws establish a context of challenges and difficulties, often forcing organisations to juggle between disparate demands, which result in persistent and deep-rooted tensions. How do, for instance, organisations pursue productivity while keeping their soul intact and delivering services true to their original purpose? Values come into play in such situations of institutional pluralism (Kraatz & Block, 2008) or institutional complexity (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011), and they may have different roles. Essentially, working with values in workplaces involves probing why people work and behave the way they do. We, therefore, address the following question: *In a complex and plural institutional context, how do leaders and members perform values work?*

By placing values work at the heart of what the actors do, the chapters in this book manifest a performative and processual practice.

Purpose and Focus of the Book

The purpose of this book is to provide new insights into how work on values is performed in organisations. The book is an edited collection of theoretical and empirical chapters that report cases from various organisations and institutional contexts in Scandinavia, Europe and Africa. We give special attention to values-salient organisations, particularly public and civic welfare organisations, as much of their interactions are characterised by competing demands and divergent value orientations, and their practices are conceived as moral work (Hasenfeld, 1983). We have focused on studying values-salient organisations because they represent an 'extreme' scenario in our study area.

Whereas previous literature on values has focused on cultural and cognitive perspectives, the starting point of this book is a *practice* perspective that analyses what is being done by whom and how, in relation to values. We especially identify and emphasise micro-processes in complex and challenging organisational situations—an area where the literature

on institutions and institutional theories is relatively silent. By adopting a practice perspective and focusing on micro-processes, we fill a gap and call for research on institutional theories (Hampel, Lawrence, Tracey,Greenwood, & Oliver, 2017; Micelotta, Lounsbury, & Greenwood, 2017). Using in-depth studies on institutional leadership and practices of values work in organisations, this book applies different theoretical lenses within the umbrella of institutional theories combined with micro-level perspectives and practice-based approaches.

Introducing Values and Values Work

Values are intractably connected to norms and morals: they signify worth, preferences and priorities and separate the desirable from the undesirable. The question of realising the 'good' is an existential theme that may align with the *telos* and overall goals inherent to practices. For several case organisations discussed in this volume, realising the good is a fundamental theme because they identify as faith-based (Askeland, Espedal, & Sirris, 2019) or because of the public *ethos*. We recognise these organisations as values-salient performing some kind of moral work (Billis, 2010; Hasenfeld, 2010).

Our working definition of values is as follows: Values *are individual and collective trans-situational conceptions of desirable behaviours, objectives and ideals that serve to guide or valuate practice.*

Our interest in values work stems from a longstanding call for bringing work back into organisations (Barley & Kunda, 2001). Acknowledging the role of values in several institutional perspectives, we relate values to the work and agency of leaders as well as to various groups of organisational actors. Work refers to activities involving mental or physical effort performed to accomplish the results of any description. Since values are inherently connected to actions in a threefold manner—by intention, direction and interpretation—the work practices of leaders are fertile areas for studying values. We follow a recent stream of organisational research: theorising values work in organisations as ongoing performances situated in everyday practice (Gehman, Trevino, & Garud, 2013; Vaccaro & Palazzo, 2015).

Values work reflects normative assumptions and goals—it concerns what is of value and what are the important behaviours to the organisation. The process of producing value-related actions is central. Values work can take place in the implementation of institutionalised practice, but it is more prominent in phases where organisations maintain, for example, their normative or value-based roots (Lawrence & Suddaby, 2006, pp. 222–230). In this book, we define *values work* as *including any set of acts in everyday work as being value-driven, and values work to be a particular set of actions that enhance the ongoing knowledge and reflection-creating processes that infuse an organization with value-related actions* (Espedal, 2019).

Values in Organisations and Leadership

We note a resurgence of interest in values, both in public policy discourses and in research on organisational institutionalism and leadership. However, in the context of organisations, values are often taken for granted. The term or concept itself is rarely examined or discussed, despite its relevance to the purpose and direction of organisational and leadership practice. As such, this book presents studies in which values are externalised in work and become part of the social practice of leaders and organisations.

Many leadership theories have been developed to help leaders cope with challenging organisational situations. Performance management has proposed an approach to increase the effectiveness of companies by improving the performance of its employees (Armstrong & Baron, 1998). A functionalistic guide to improving the culture through values-based processes (McSween, 2003) has been proposed, which identifies values as drivers of co-operation. Such 'value management' approaches have been presented to facilitate the building of values-driven organisations. Thus, work often performed by consultants has fuelled assumptions that values somehow exist in organisations independent of action and primarily constructed by leaders (Barrett, 2006). Thus, though many organisations have established core values to influence practice (Falkenberg, 2006), they are treated as 'mantras' in organisations

(Lencioni, 2002), and organisations tend to focus more on defining them than implementing them (Gehman et al., 2013).

The last decade has seen a renewed emphasis on the importance of values ethics and morality among leaders (Copeland, 2014). Values are also related to social corporate responsibility and business ethics (Stackman, Pinder, & Connor, 2000). Theories such as transformational leadership, authentic leadership and ethical leadership have incorporated an ethical and moral component into leader behaviour. However, in this book, we lean towards a values-based tradition that highlights values as central to understanding social processes in organisations and leadership (Selznick, 2008). Alternatively, we consider values as embedded in national cultures, shaping the charismatic idea of values-based leadership (House, 1996; House, Quigley, & de Luque, 2010). During the last decades, contributions from a Scandinavian context have shed light on 'values-based leadership', underscoring how leaders reflect and promote processes to enhance values-consciousness in organisational practices (Aadland & Askeland, 2017; Petersen & Stuhr Lassen, 1997; Pruzan, 2004). What values are, what they do and what threatens them offer insights into the development of humanist concerns and viewpoints. Following Selznick (2008), values are understood as expressions of what matters in social life, what leads to social flourishing and conditions that allow for humans to thrive.

Overview of Chapters in the Book

To introduce the content of the book, we have grouped the chapters under the headings of the *what*, *who* and *how* of understanding values work in organisations and leadership. The *what* section presents a theoretical framework for understanding values, the emerging field of values work and values work in plural institutional environments. The *who* of values work focuses on actors, leaders and various aspects of institutional leadership. We present studies investigating institutional leadership as it creates, change and maintain institutions by practice.

The third section introduces studies elaborating *how* values work can be found in the processes of organisations and in situations where actors

influence values work. What work promotes the standards, ideals and identity of organisations?

The *What* of Understanding Values Work—A Theoretical Framework

This section of the book takes a closer look at the values construct evident in everyday language, public debate and policy. Providing a frame for examining values work, the chapters clarify how we conceptualise and apply the term *values*. Askeland outlines the trajectory of values, particularly within streams of organisational institutionalism. Conveying a frame for discussing values work, it clarifies how to conceptualise the term *values*. Discussing classic and recent contributions, the chapter proposes a working definition of values. We review studies on values work in organisations. Espedal reviews the existing empirical studies and emerging literature on values work in organisations, aiming to disambiguate the phenomenon. Understanding values work as ongoing value performances, it is identified as social and institutional processes of constructing agency, actions and practice. Values work is part of both a performative tradition of process studies and an institutional work tradition that strives to change, disrupt and maintain institutions. The final chapter in this section, by Sirris, introduces readers to the unique complexity of the Scandinavian welfare mix by investigating how institutional complexity relates to values work in organisations. Seen complexity as a contextual condition that triggers work on values and identities, it discusses how the intersection of a welfare logic and a market logic affects organisational values and identities.

Exploring *Who* Is Doing Values Work—The Actors

We witness a resurgence of interest in institutional leadership, originally conceptualised by Selznick over sixty years ago (Selznick, 1957/1983). Central to the concept of institutional leadership is its distinction from

terms such as 'management' or 'administration' (Raffaelli & Glynn, 2015; Selznick, 1957/1983). According to Selznick, institutional leadership involves 'infusing' the organisation with values, and it distinguishes a leader from an administrator. Institutional leadership concerns establishing and protecting institutional values and character. It is oriented towards self-maintenance retrospective. While some contributions seek to identify the central aspects of institutional leadership, others show how leaders contribute to either institutional creation (Struminska-Kutra, 2018), maintenance through adaption (Askeland, 2014) or change (Kraatz & Moore, 2002). This section foregrounds leadership in understanding how organisational values work contributes to renewal in practice. The chapters in this section address how managers work intentionally with values through different forms of institutional work.

To understand institutional leadership, we also identify how, for instance, poverty became a fundamental value of the Jesuit organisation revisiting the relevance of values. Bento da Silva discusses a less known part of Selznick's work in which the ambiguous character of values is highlighted. He analyses how poverty has been conceptualised within a Catholic religious organisation, showing that, in the Jesuit case, poverty is not strictly defined. Instead, poverty results from the constant dialogue between the individual Jesuit and their leader. Being the result of such a constant dialogue between the leader and their followers, institutional leadership can be revisited and freed from the heroic view that has long characterised it.

Askeland addresses how managers through values work enact critical functions of institutional leadership, by ongoing efforts and the recurring facilitation of processes relating the mission, values and character of the organisation. The chapter analyses how leaders maintain and develop the 'good organisation' through three thematic frames: Conceiving of the 'good home', enhancing 'the common good' and establishing a shared, embodied understanding of 'good practice'. Struminska-Kutra and Askeland illustrate how leaders respond to external pressures for change and actively transform organisational practices and identities. They argue that leader's action displays either through projective, future-oriented agency or by habitual agency. The chapter develops a typology of strategies used

by leaders in response to plural isomorphic pressures. Lindheim explores how employees and managers negotiate leadership across cultures when interacting with one another's implicit ideas of leadership. The chapter explains how contextual factors at the institutional, field and organisational levels along with individual experiences from the native country and the Norwegian work context present a dynamic cultural configuration that shapes the implicit ideas of good and bad leadership. Vea, Kessel and Kanywenge explore how the leadership journey is experienced differently by women around the world. Analysing stories of women leaders from South Kivu, the Democratic Republic of Congo, the chapter contributes to the knowledge on how women compete and negotiate paths to leadership through values work in a context of conflict and violence.

Understanding *How* to Do Values Work

Our ideals are tied to our experience, choices, projects and customs. Our realisation of them is supported by sound knowledge and enhanced by how we think and our judgements of what to do. Everything worth knowing has an *eidos*—a form of an idea—that gives it a unique conception (Selznick, 2008). The ideas of values such as justice, piety, love and trust are normative as well as cognitive. How these values manifest in actions is an aspect that needs further investigation. A process-based perspective might aid in catching values in flight. Espedal focuses on the use of process studies in relation to the investigation of values work in organisations. The chapter explains how values work can be studied through a strong-process perspective linked to practices that develop, grow or terminate values over time. Process studies identify various mechanisms and issues related to the performative, situated and agentic nature of values work. In this work, different methodology approaches are suggested for process studies investigating values work and institutionalising processes.

Von Essen analyses how values related to the volunteer experience are used to construct identities of engaged citizens in contemporary Swedish society. By evaluating a normative significant situation, a human agent discloses the kind of person she wants to be, so that identity is defined by the agent's evaluations. Kivle elaborates on mechanisms of values work,

based on textual analysis concerning trust and trust-based management in three Scandinavian popular scientific journals. Findings indicate that trust is 'worked upon' simultaneously within competing frameworks, which are also interpreted to be manifestations of differences between institutional logics.

Løvaas and Vråle investigate how values work are performed through group reflections of middle managers. Findings indicate that spaces of group reflection enable individual actors to *move inward* representing identity processes, and *move forward*, getting the courage and strength from the managerial group reflection. Sirris explores how managers negotiate organisational core values to perform values work. The chapter conceptualises the dynamics of values being simultaneously fixed—at an organisational discursive level—and fluid—at an individual managerial level—as value elasticity.

We believe these studies allow a more nuanced understanding of values work in organisations and divergent configurations of practice. We argue this promotes better consciousness and reflection on standards and ideals in difficult organisational situations. The editors and authors of this book sincerely hope that this work will stimulate further discussions and dialogue on how to perform values work in organisations. We also hope that it serves as a useful resource for scholars working in the domains of organisation and leadership studies.

The editors want to express our gratitude to those who gave their help in the process of writing and production of this volume. Professor Arild Wæraas, professor Annette Leis-Peters and Ph.D. fellow Bjørg Aambø Østby have all given invaluable comments to early drafts of the individual chapters. We are also thankful to Liz Barlow at Palgrave for believing in and accepting this book, along with generous support from our own institution, VID, by rector Ingunn Moser and vice-rector Bård Mæland to fund the open-access publication.

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Part I

Understanding Values, Values Work and Complex Institutional Contexts

2

Values—Reviewing the Construct and Drawing Implications for Values Work in Organisation and Leadership

Harald Askeland

Introduction

Values are an inseparable part of organisational institutionalism and are at the core of the definition in many sub-streams of institutional theory. As ideas of the desirable or appropriate, values have bearing on meaning, what ought to be and choice of appropriate action. Values link to the very essence of institutions, their distinct character or identity, the logics influencing them and work done to create, maintain and change them. Values work in organisations shapes the purpose of organisations and the direction of efforts and composes criteria for the valuation of organisational practices. Increasingly embedded in multiple institutional environments or operating at institutional intersections, organisations experience pressures regarding core values, structures and processes. In this context, we argue that understanding values and abilities to perform values work

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is of importance for institutional development and institutional leadership. Supporting the aim of exploring values work, this chapter takes a closer look at the values construct itself.

While considered a dormant concept or under-developed issue for some time (Chen, Lune, & Queen, 2013; Hitlin & Piliavin, 2004), this book argues there is a resurgence of interest in the construct of values. This holds true in public policy discourses and in research within organisational institutionalism and leadership. Inherent in institutional arrangement, values are core constructs of normative structures and thus taken for granted. At the same time, precise prescriptions of action are not necessarily given. Being both individual and shared by collectives, values might form the base for either consensus or competing orientations among actors and interest groups.

The values construct has an enduring trajectory in academic writing on organisations and leadership (Bednarek-Gilland, 2016; Deth & Scarbrough, 1995; Meglino & Ravlin, 1998; Spates, 1983) but has also a natural part of everyday language, public debate and policy. The term captures increasing interest within central perspectives of institutional theory, such as institutional logics (Friedland & Alford, 1991; Krücken, Meyer, & Walgenbach, 2017), institutional work (Lawrence, Leca, & Zilber, 2013), values work (Aadland et al., 2006; Askeland, 2014; Gehman, Trevino, & Garud, 2013; Vaccaro & Palazzo, 2014) and identity work (Albert & Whetten, 1985; Schmid, 2013; Watson, 2008). Also within the field of research on managers or leaders, we see a resurgence of an interest in values. Values is an important concept in perspectives such as managing and institutional leadership (Cameron, Quinn, DeGraff, & Thakor, 2006; Kraatz & Flores, 2015; Mintzberg, 2009; Raffaelli & Glynn, 2015), public administration (de Vries & Kim, 2011; Jørgensen, Vrangbæk, & Sørensen, 2013; Moore, 1995) and nonprofit management (Aadland & Skjørshammer, 2012; Askeland, 2011, 2015; Jeavons, 1992; Knutsen, 2012). Yet, in spite of this renewed interest, the term itself remains somewhat ambiguous and taken for granted. This ambiguity is argued to be inherent in values, allowing for differing interpretations by actors while at the same time creating a sense of unity (Askeland, Espedal, & Sirris, 2019).

This chapter outlines the trajectory of values, particularly within streams of organisational institutionalism, in order to analyse its application to values work in organisation and leadership. Conveying a frame for discussing values work in this book requires clarification of how we conceptualise the concept values. While economists relate value to objects, which differs in value due to the strength of preference of actors or consumers, I will position it in line with contributions that underscore values' relation to valuation emanating from meaning, concern, normative agreements and what is considered desirable (Askeland & Aadland, 2017; Bednarek-Gilland, 2016; Kluckhohn, 1951; Spates, 1983). The latter makes the connection of individuals and collectives a crucial issue.

Basic Distinctions and Trajectory of the Values' Concept

Basic distinctions of the term values stem from differing paradigms and often represent single perspectives. Such basic positions relate to various positions of philosophy of science in the social sciences (Hollis, 2002; Kemmis, 2011), and I argue it can be applied to separate contributions linking values to organisation and leadership. Two key dimensions, each one claiming opposing views, have consequences for the study and explanation of values. The first dimension regards the distinction between objective and subjective, while the other regards structure versus agency. The first distinction affects viewing values either in a factual or interpretive way, while the other affects viewing values as either individual properties or collectively articulated and shared.

It is possible to identify two different basic understandings of values (Aadland, 2010; Bednarek-Gilland, 2016), often referred to as the distinction between 'facts and ideals'. This distinction draws on Simon, who distinguishes between factual and ethical (ideational) aspects of decisions in organisations (Simon, 1957, pp. 55–57). Research on values consequently often uses differing strategies and methodologies.

The major tradition conceptualises values as inherent qualities identified and explored as objectively existing phenomena of social life (Meglino & Ravlin, 1998). Even if values are conceptualised partly as

beliefs (Rokeach, 1973; Schwartz, 1994), research has concentrated on establishing measurement instruments to map existing patterns of values among individual actors and between national cultures. Major international surveys on values, which find different cultural and social patterns in different countries' values, apply this perception of values and ascribe them structural properties that influence behaviour (Inglehart, 1990; Schwartz, 2006). One of the most influential contributions to values research, and much cited in the scholarly literature, defines values as 'an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence' (Rokeach, 1973, p. 5). The values described in surveys are short forms of people's action flexibilities. Such a perception, applied to values work, argues leaders should identify desirable organisational values and launch measures to ensure the implementation of those values (Lencioni, 2002). This perception is indebted to a somewhat positivist view of science and characterised as objectivist values (Bednarek-Gilland, 2016, p. 2), concerning studying values *for* practice. Consequently much research in this tradition, as represented by Rokeach and Schwartz, implicitly addresses values in an individualistic manner (Chanut, Chomienne, & Desmarais, 2015, p. 221). Questionnaires address individual respondents, and the collective or shared aspect of values is portrayed as an aggregated accumulation of individuals to the group level.

Another approach regards values as phenomena constructed and added to common sense in the social space, catching attention and affecting practice for a time and later replaced by new issues (Aadland, 2010; Bednarek-Gilland, 2016; Deth & Scarbrough, 1995). An important idea put forth by Van Deth and Scarbrough contributes particularly to a collective grounding of values: 'Values could be seen as conceptions of the desirable, which are not directly observable, but are evident in moral discourse and patterns of attitudes forming value orientations with relevance to action' (Deth & Scarbrough, 1995). Values are, in other words, linguistic constructions that express assigned importance. They inherently rely on arguments such as 'ought', 'preferable' and 'good', having moral or ethical implications not reducible to factual terms (Simon, 1957, p. 56). Values, therefore, cannot be studied directly; they

function more like projections and interpretations by a person of what is a good or wrong act or thing (Askeland & Aadland, 2017, p. 27; Gehman et al., 2013). Values develop through dialogue and interpretation in specific contexts. Bednarek-Gilland (2016) underscores this, arguing values can change due to experiential learning through facing issues or situations related to what concerns actors. Such concern represents states of being that are 'trans-situative' and 'trans-subjective' (Bednarek-Gilland, 2016, p. 4). Various actors bring their own experiences, assessments and interests into the opinion formation process. Organisational practice is ambiguous, and the relationship between values and action cannot be proven in a closed chain of logical cause and effect (Aadland, 2010). This points at experience as central in both the inculcation and eventual transformation of values. Consequently, values tied to social collectives and/or organisations through articulation are part of common sense or a shared meaning- or norm-structure. Such an understanding, focusing on social construction, implies more use of qualitative data.

In both understandings, the concept of values closely relates to ethics and morality. Values indicate good and wrong and function both as descriptive and normative concepts. In their descriptive function, values describe actual valuation practices that characterise people in a given group or how values develop as meaningful in given contexts. In a normative function, values inform ideals and overall objectives—whether understood as timeless and universal or as relative and contextual in nature.

Furthermore, Brown and Treviño argue there exists little correlation between different theories and measures within the research on values and values in organisation and leadership (Brown & Treviño, 2003, p. 154). A major exception, reviewed briefly later in this chapter, is the different sub-streams of institutional theory. Although used, authors seldom define values. And their effects are briefly spelled out and taken for granted. This may indicate there has been little focus on which or what kind of values authors convey or that the question of values' significance for action and interaction is a topic that garners little attention (Maierhofer, Rafferty, & Kabanoff, 2003). Within management and leadership research, there are nevertheless some important exceptions.

Two major streams, dating back to the late 1970s and stemming from the turn to leadership, are charismatic value-based leadership (House, 1976) and transformational leadership (Avolio & Bass, 1995; Burns, 1978). A Scandinavian tradition conceptualises values in leadership more as a leadership philosophy, aimed at creating and sustaining a consensual base of values to guide organisational practices but with weak ties to management or leadership theory (Aadland et al., 2006; Brytting & Trollestad, 2000; Petersen & Lassen, 1997). These Scandinavian contributions, focusing on the collective articulation and implementation of values, come close to what is termed values work. Recent research displays renewed interest in the relationship between 'public values' and the value orientation of leaders' in public services (Chanut et al., 2015; Jørgensen, 2006; Tholen, 2011). Other contributions build on Selznick's notion of institutional leadership (Kraatz & Flores, 2015; Raffaelli & Glynn, 2015; Washington, Boal, & Davis, 2008) and finally research on how values shape important processes of institutional work framed as values work (Askeland, 2014; Gehman et al., 2013; Vaccaro & Palazzo, 2014).

Values in Streams of Institutional Theory

The concept of values, historically applied in several academic disciplines, permeates institutional theory of organisation and leadership. The term is used in such a variety of ways that a precise and unambiguous definition may seem unattainable. In the field of social science in general, central concepts have been close to the notion of values. The field's classics were already keen on rationality and cognitive or cultural patterns as explanatory factors of social life. This is especially true of Max Weber, describing comprehensive cultural changes of rationality as the basis for the development of social forms, using the term value-oriented rationality for action based on the self-conscious conviction that the action has a value inherent to itself, independent of any consequences it might or might not have (Weber, 1978). Value-rationality is contrasted by purposeful rational action, aiming at realising certain goals, while value-oriented rational action stems from compliance with policies or standards

that are binding in themselves. However, the one who put values on the agenda for comprehensive research interest was Talcott Parsons (1951). The idea of common normative thought patterns from the classics continued in the concept of value. '[T]he most important of these normative agreements were what Parsons called values – those moral beliefs to which people appealed for the ultimate rationales for action' (Spates, 1983, p. 28). Social anthropologist Clyde Kluckhohn formulated the following use and understanding of the concept of value:

> A value is a conception, implicit or explicit, distinctive of an individual or characteristic of a group, of the desirable, which influences the selection from available modes, means and ends of action. (Kluckhohn, 1951, p. 395)

This definition focuses on some important elements. First, it points to the notion that something is desirable. This implies conceiving values as normative ideals; they are mental constructs, not unbiased artefacts. Second, the definition implies that values affect the choice of available goals and options for action. Third, it distinguishes between implicit and explicit values. While the articulation and attribution of content distinguish an explicit value, implicit values lack a common conceptualisation. One last important point is Kluckhohn's emphasis on the desirable rather than desired, which positions the value concept of closer to ethics' 'should' than to psychology's 'need'. In this understanding of values, there are important elements that only affect the relationship between values and action (Deth & Scarbrough, 1995, pp. 31–36). As ideas of the desirable, values can mobilise the notion of what should happen, acted upon or be used as a basis for valuation.

Institutional theories have risen to become a dominant sociological and organisational theory of collectives and collective action. Moreover, the concept of values constitutes an inseparable part of institutional theories. Most obviously, values are key in Selznick's conceptualisation of institutions and institutional leadership. In contrast to organisations, understood as administrative and technical systems, he emphasises the institution as being a kind of informal 'social constitution' shaped by 'natural social processes' and 'adaptive changes', leading to a process of

institutionalisation in which it is 'infused with value beyond the technical requirements of the task at hand' (Selznick, 1957/1984, p. 17). Distinguishing administration from leadership, Selznick portrays the institutional leader as 'primarily an expert in the promotion and protection of values' (Selznick, 1957/1984, p. 17).

Later contributions also continue to include values when defining the term institution: 'We see institutions as cultural rules giving collective meaning and value to particular entities and activities, integrating them into the larger schemes' (Meyer & Boli, 1987, p. 13). In most definitions, values is implicitly embedded in terminology such as 'normative systems', 'beliefs' and 'cognitive understandings': '(…) we understand the term to refer to more-or-less taken-for-granted repetitive social behavior that is underpinned by normative systems and cognitive understandings that give meaning to social exchange and thus enable self-reproducing social order' (Greenwood, Oliver, Sahlin, & Suddaby, 2008, p. 5).

According to Scott, this is particularly true for one cluster of theories, the normative theories, attending to the ways in which values, norms and commitments generated in interaction shape, undermine and augment formal and official regimes (Scott, 2004, p. 410). Their importance lies in introducing prescriptive, evaluative and obligatory dimensions into social life. As a response, individual or collective actors determine the nature of the situation, reflect on the nature of their own identity and act accordingly. Values might also be important from the cultural-cognitive perspective, as such view rests on more 'deeply set beliefs and assumptions' (Scott, 2005, p. 16). Therefore, an early key contribution of institutional theory has been accounts of the processes by which behaviour is governed by institutions or by institutionalised, taken-for-granted assumptions (Lawrence & Suddaby, 2006, p. 215). Across the contributions, authors have accepted the notion that values affect organisations and that organisations adopt structures and practices in order to gain legitimacy (Greenwood et al., 2008, p. 7).

The further development of institutional theory nuanced the overall notion of adaption, thus challenging this assumed causal argument (Scott, 2005). A first nuance was recognising the varied and conflicting nature of institutional environments, which consisted of fields with differing and plural value orientations inherent in institutional logics

(Friedland & Alford, 1991).[1] In the subsequent development of the institutional logics perspective, values were originally maintained as part of defining logics (Thornton & Ocasio, 2008).

Secondly, actors and their capacity to exercise agency and make a difference paved the way for processual approaches to examine how actors handle differing pressures or work to maintain or change institutions. Particularly in explaining change, institutional theory needed to incorporate 'the reality of purposive, interest-driven, and conflictual behavior' (DiMaggio, 1988, p. 5). Institutional work which is '*the purposive action of individuals and organisations aimed at creating, maintaining and disrupting institutions*' (Lawrence & Suddaby, 2006, p. 215) underscores an actor's perspective. Institutional work presupposes that individuals' and organisations' behaviour is framed by larger patterns of ideas and opinions about what is 'good or less good' in organisational and management practice. Values are critical in the establishment or implementation of institutionalised practice but have particular emphasis in phases where organisations maintain, for example, their normative or value-based basis (Lawrence & Suddaby, 2006, pp. 222–230).

Of special interest, I find contributions of values work that identify and integrate the agentic efforts in temporal processes mobilising action based on or in support of values (Gehman et al., 2013; Vaccaro & Palazzo, 2014).[2] In addition, contributions addressing the particular role of leaders in infusing or promoting values in organisations are of interest (Askeland, 2014; Golant, Sillince, Harvey, & Maclean, 2015; Kraatz & Flores, 2015; Raffaelli & Glynn, 2015; Washington et al., 2008).

In these contributions, values are usually not explicitly defined but instead taken for granted. One exception is the work of Gehman and colleagues (2013), which explicates a values definition but does not elaborate on it. While functionalist theory, and the Parsonian legacy, had lost strength, theoretical inspiration for institutional theories came from classical theorists such as Durkheim and Weber (Durkheim, 2001; Weber, 1978) as well as Berger and Luckman, applying the notion of institutionalisation in their sociology of knowledge (Berger & Luckmann, 1967).

[1]For a further elaboration on the logics perspective, see Sirris's chapter in this book.

[2]For a review on the values work literature, see Espedals contribution in this volume.

Scott contends that the normative perspective in institutional theory borrows from earlier, normatively oriented sociologists such as Parsons and Selznick (Parsons, 1935, 1960; Scott, 2005; Selznick, 1949, 1957/1984).

Following Spates, it seems reasonable that this taken-for-granted use of the concept of values relies heavily on a Parsonian understanding of values. Spates argues that the basic idea that values were a controlling factor in social life, which permeated American sociology, is an enduring Parsonian legacy (Spates, 1983, p. 30). As argued in an earlier section, Kluchhohn's definition of values is one of the most widely used, implying that values become the instigator of behaviour 'within' the individual through socialisation. As such, they convey legitimacy when observed; they order social life by shaping behavioural orientation by being institutionalised and taking on rule-likeness. All these components, emanating from within the Parsonian values theory (Parsons, 1951; Spates, 1983, p. 31), are traceable in major contributions of institutional theory although supplemented by refinement and the incorporation of re-constructed theoretical considerations. Important ideas contradicting these basic assumptions relate to issues of institutional pluralism and conflicting logics, agency and the processes accompanying the creation, maintenance and change of institutions and institutionalised practices.

Values are part of the core construction of or definition in the following four important contemporary streams of institutional theory of particular interest in this book: institutional leadership, institutional identity, institutional logics and institutional (values) work.

Rounding Out the Concept of Values

The concept of values, as it originated in sociology, permeates the institutional theory of organisation and leadership. Caused by variety of definitions, a rounding out of the term seems preferable over a precise and unambiguous definition. In the social sciences, the term has been used in social economics, sociology, social psychology, political science and social anthropology but with only some connection or similarity in

how it has been used in the various academic fields (Graeber, 2001; Hitlin & Piliavin, 2004). While values theory has enjoyed some development regarding its explication and measurement through value surveys (House, Quigley, & de Luque, 2010; Meglino & Ravlin, 1998; Rokeach, 1973; Schwartz, 2006), it seems to be an under-specified yet frequently used and taken-for-granted term in streams of institutional theory (Friedland, 2017). Based on earlier contributions, I suggest a 'rounding out' of the values term combining prior (Kluckhohn, 1951; Rokeach, 1973; Schwartz, 1994) and more recent developments (Askeland & Aadland, 2017; Bednarek-Gilland, 2016; Gehman et al., 2013).

For such a 'rounding out' regarding values, there are important elements affecting the relationship between values and action (Deth & Scarbrough, 1995, pp. 31–36). As ideas of the desirable, values can mobilise the notion of what ought to happen or be the basis for valuation. At the same time, values do not directly prescribe any specific action choices but rather form principles upon which to assess or valuate action. Van Deth and Scarbrough assume that patterns of attitudes constitute value orientations, which in turn indirectly manifest themselves in actions. While held by individuals, values become social through articulation and form a part of common sense or serve as underlying normative structures.[3] As such, they can be shared by [members of] an organised collective. Values also relate to the interests of actors or groups and are also situated in differing contexts, which implies they are not necessarily organised hierarchically but rather related in 'clusters' of neighbouring values (Stackman, Pinder, & Connor, 2000). These clusters may form orientations, even within the same organisation, where different groups place more or less importance on professional, administrative and economic values. Thus, it becomes likely that there might be tension and conflict among the various clusters of values constituting competition or dilemmas needing to be resolved (Quinn & Rohrbaugh, 1983; Selznick, 1957).

As a working definition for studying values work in organisations and leadership, I propose to conceive of values as:

[3]For a more thorough discussion on differing forms of values at the collective or organizational level, see Bourne and Jenkins's elaborate categorisation (Bourne & Jenkins, 2013).

> Values are individual and collective conceptions of desirable trans-situational behaviours, objectives and ideals, serving to guide or valuate practice.

Implicit in this definition is that values (1) are either explicitly or implicitly contextual (spatial and temporally situated); (2) serve to mobilise for and direct action; (3) are not observable but manifested in or as the valuation of practice; (4) are acquired through socialisation into group values yet changeable through experiential learning; (5) are constituted, maintained and changed in dialectical interaction between the individual and his or her social collective and (6) even when shared they are ambiguous and open for interpretation.

Leaders contribute by focusing on values and ethical considerations to 'frame' value standards for the organisation and its behaviour as well as drawing boundaries for types of behaviour deemed unacceptable. This has implications internally in the organisation as well as for its legitimacy in relation to the external environment. Increasingly organisations and leaders find themselves in plural institutional contexts, representing conflicting or co-existing institutional logics. While institutional theory has traditionally emphasised external pressure leading to organisational adaption or differing adaptive or coping strategies, the last two decades have produced contributions arguing for bringing both society (Friedland & Alford, 1991), the agentic actor (Battilana, 2004; Kraatz, 2009) and work back in (Barley & Kunda, 2001). These streams of research and theorising developed into differentiated perspectives, and few studies connect these perspectives. While not aiming at resolving this differentiation, I argue that values entail a concept central to all of these strands of research interest and constitute a venue for examining commonalities and points of departure for bridging efforts.

Implications for Values Work in Organisation and Leadership

Although sub-streams of institutional theory often employ the term values in core definitions, hardly ever is the term elaborated or clarified.

At the same time, many basic assumptions of Parsonian theory underpin the functions attributed to values, either taking values for granted or omitting the values term, substituting it with terms like 'normative expectations', 'beliefs' and 'cognitive structures' (Friedland, 2017). Institutional logics, which is of interest for contributions of the book, rarely define the values term in recent work although it was a central concept in the originating works (Friedland, 2017; Friedland & Alford, 1991). Important exceptions are the resurgence of interest in institutional leadership (Kraatz & Flores, 2015; Washington et al., 2008) and values work (Gehman et al., 2013).

Such exploration should more generally attend to issues such as spanning the micro-macro divide, the importance of context, temporal or processual aspects, organisational identity and finally the intentionality or agentic aspect of values work.

Finally, the chapter elaborates on how a renewed conceptualisation of values (Askeland & Aadland, 2017; Bednarek-Gilland, 2016) might inform further research on values work in organisation and leadership studies. In explicating the role of values, their situatedness in contexts marked by pluralistic institutional environments (Kraatz & Block, 2017) become critical. Studying organisations at intersections of differing fields necessitates a conscious explication of how values relate to both individual organisations and their embeddedness in particular fields. In particular, values are key to exploring how organisations come to hold specific values, either aligning with plural external and internal demands or developing distinct values, giving character to the organisation. While institutional leadership traditionally is closely related to maintenance processes, closer attention must be paid to the ongoing adaption and re-articulation of values as institutional contexts either change or evolve into institutional pluralism. I suggest special attention should be given to how change or re-alignment occurs through experiential learning as leading actors facilitate organisational processes and dialectical interaction to promote new, shared understandings of values in organisations. The seemingly ambiguous nature of values might enable intentional efforts of such articulation or framing. In allowing sharing yet individually interpreting values, values work might promote unified diversity, encouraging

ongoing and recurring exploration of meaning and practices and link continuity with contextually situated adaptive change.

Several of the remaining chapters of this book undertake such efforts, expanding our understanding of 'who' performs values work and 'how' processes evolve temporally. This might shed light on the ongoing re-explication of institutional leadership but also contribute to bridging the inter-relatedness of the institutional logics and institutional work perspectives.

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3

What Is Values Work? A Review of Values Work in Organisations

Gry Espedal

Research on Values Work: An Introduction

Research on *values work* can be seen as a new trajectory within the domain of research on values in organisations. There is a growing body of knowledge that has identified relationships between shared values and organisational performance on the one hand and societal values and organisational behaviour on the other (Agle & Caldwell, 1999). However, it is argued that we need to go beyond studies of organisational behaviour and decision-making to understand values as modes of behaviour, or as values-in-use, in organisational practice (Meglino & Ravlin, 1998).

Responding to the call, Gehman, Trevino, and Garud (2013) proposed a *practice perspective* to values in organisations, which focuses on the processes whereby values emerge in work performances. The practice perspective is different from a cognitive and a cultural approach to studying

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values. The *cognitive perspective* on values studies offers nuanced vocabularies for describing values in abstract terms—a repertoire of discrete values and typologies of workplace values (Quinn & Rohrbaugh, 1983; Rohan, 2000; Schwartz, 1992). A *cultural* perspective on values focuses on the manifestation of values in various artefacts, rituals and symbols through the roles of entrepreneurs and executives and the organising of values through the use of language (Harrison & Beyer, 1984; Martin, 1992; Schein, 2010). The *practice* perspective draws attention to the practices in which the values are performed (Gehman et al., 2013, p. 86). It is broadly consistent with the 'practice turn' (Schatzki, 2001) in organisations. Values are to be found in practice (Dewey, 1939) and pursued as ends in themselves. As such, Gehman et al. (2013, p. 84) define *values practices* in organisations as 'sayings and doings in organizations that articulate and accomplish what is normatively right and wrong, good or bad, for its own sake'.

A Literature Review of Values Work in Organisations

To identify studies that broaden the emerging concepts of values work in organisations, I reviewed the available studies on the subject and their contributions. A computer-based literature search was conducted in international research databases such as ABI/Inform and Business Source Complete (BSC). The databases covered a broad range of recent articles published in the disciplines of economy, organisations and leadership. Keywords such as 'values work' and 'organization' were searched for in titles, abstracts and article keywords in papers published during the last ten years—from 2008 to 2018. I chose a time frame of 10 years to include articles published before Gehman et al.'s (2013) notions of values work.

An initial search produced a relatively large number of articles: 30 published articles in ABI/Inform and 83 in BSC. To narrow down the number, a few inclusion criteria were imposed. Studies were chosen only if (1) they were empirical works that researched *values work* as a phenomenon within organisations, (2) they identified structures, processes

or mechanisms of values work in organisations, and (3) they were published in either a Scandinavian language or English. Articles on 'work values' that emphasised the development of individual values on joining an organisation or on entering an occupation (Connor & Becker, 1994) were excluded from the study. Other excluded works were empirical studies that focused on economic and strategic approaches, such as sustainability strategy and value congruence as well as those based on psychological research and management, such as work-life balance and workplace commitment. A manual search was also performed on all the selected articles to identify additional references.

Of the published articles selected from the literature review (Hart, 2018), six empirical articles were considered relevant to this review, and all the six were empirical studies that focused primarily on values work as performed in organisations. Three articles used the term 'values work' or referred to Gehman et al.'s study of values work in organisations (Perkmann & Spicer, 2014; Vaccaro & Palazzo, 2015; Wright, Zammuto, & Liesch, 2017). One article did not mention the term 'values work', but it was cited in one of the review articles and was a distinct study on values in a crisis situation within an organisation (Gutierrez, Howard-Grenville, & Scully, 2010). One article was included because it was based on empirical studies of values work in extant literature and discussed values as part of the dynamic nature of organisations (Bourne & Jenkins, 2013). Table 3.1 presents the titles, research questions, methods and findings of the six selected studies.

The six empirical studies were analysed for the following: definition of values and values work, the institutional context of values work, the institutional processes and outcome of values work. Additionally, they were compared to two Norwegian studies on values in faith-based institutions (Aadland & Skjørshammer, 2012; Askeland, 2014). The Norwegian papers did not appear in the online literature search. However, they constitute unique empirical studies on values in organisations, especially in the context of faith-based institutions. Through an action research process, Aadland and Skjørshammer (2012) identified values reflections as enhancing values practices and change. The process of critical value reflection was considered a viable strategy to promote ethical reflection, increase moral sensitivity and raise awareness of values-in-use among staff

Table 3.1 Empirical articles relevant to the literature review

Authors' last names and article title	Research question	Methods	Findings and contributions
Gehman, J. Treviño, L. K. Garud, R. 2013 Values work: A process of the emergence and performance of organizational values practices *USA*	How do values practices emerge and how are they performed?	A ten-year study of the development of an honour code in a business school Archival sources; ethnographic observation; stakeholder interviews Combining practice perspective and actor-network theory	Defining values practices as sayings and doings in organisations that articulate and accomplish what is normatively right and wrong, good or bad, for its own sake Values work deals with a set of concerns, tying local concerns to action networks, performing values practices, leading to circulating values discourses
Vaccaro, A. Palazzo, G. 2015 Values against violence: Institutional change in societies dominated by organized crime *Italy*	How can institutional change succeed in a social context that is dominated by organised crime?	Eight-year study of a Sicilian anti-mafia initiative and a grass-roots movement: Addiopizzo (2004–2012) Utilising publicly available sources such as news articles; internal documents; interviews within Addiopizzo's network and with officials and experts; direct observation Combining institutional theory, stability and change literature	Going beyond the observation of values practice to show how change agents are using values strategically to transform the highly resistant setting of paying *pizzo* Identifying five micro-processes that leverage values in interaction with stakeholders: hooking, anchoring, activating, securing and uniting

Authors' last names and article title	Research question	Methods	Findings and contributions
Bourne, H. Jenkins, M. 2013 Organizational values: A dynamic perspective *UK*	What distinct forms of organisational values could there be and what are the relations between them?	Empirical studies in extant literature Propositions set out from institutional, organisational and managerial sources Contributing to the field of organisational values	Developing a framework that shows the interrelationships between forms of values, highlighting the dynamic nature of organisational values Defining four distinct forms of organisational values: espoused, attributes, shared, and aspirational and showing how they reveal the dynamic nature of organisational values
Perkman, M. Spicer, A. 2015 How emerging organizations take form: The role of imprinting and values in organizational bricolage *UK*	How emerging organisations are selecting forms in a context where multiple forms are available and how they are shaping the organisation	A six-year inductive and empirical study of the construction of a web-based company offering open publishing Gathering and reading of historical material and exchanges from two media online message boards	Identifying organisational values as aids to select organisational forms in resonance with the general purpose of the organisation, providing a yardstick and an engine for judging the compatibility of alternative organisational forms

(continued)

Table 3.1 (continued)

Authors' last names and article title	Research question	Methods	Findings and contributions
		Contributing to the field of institutional complexity, process studies, organisational values	Organisational bricolage is suggested as shaping organisational forms in the environment of multiple choices. Forms are aligned with organisational values, and values act as a focusing device shaping organisational structure
Wright, A. L. Zammuto, R. F. Liesch, P. W. 2017 Maintaining the values of a profession: Institutional work and moral emotions in the emergency department *Australia*	How specialist actors engage in institutional work and maintain their professional values when they interact with each other and balance demands from the public healthcare system	A three-year study of specialists in emergency medicine in a public hospital Observation; interviews; archival data Contributing to institutional work, values and moral emotions	Values identified as a source of conflict and a motive for professional action inside organisations Two micro-processes maintain professional values: (1) when value interpretations are misaligned between different specialists, transitory moral emotions motivate institutional maintenance, and (2) when practice is misaligned with values, moral emotions are enduring and shared and mobilise collective maintenance

Authors' last names and article title	Research question	Methods	Findings and contributions
			Organisational practices are adapted or changed
Gutierrez, B. Howard-Grenville, J. Scully, M. A. 2010 The faithful rise up: Split identification and an unlikely change effort *USA*	How can identification trigger and shape change effort?	A three-year study of the emergence of unlikely activism from committed members of the Catholic Church Interviews; readings of newspaper articles; archival sources Contributing to identification theory and organisational change	The crafting of 'split identification' is identified as allowing members to identify with the normative aspects of an institution. Despite values such as loyalty being challenged, voices are expressed in a crisis to bring about change 'Split identification' attempts to repair the split by seeking change and by responding to realign with valued norms

and leaders. By shadowing leaders, Askeland (2014) noted that leaders initiate values processes in faith-based organisations and thus become agents for the institutionalisation of organisational values. Leaders contribute to identity and values formation through information and relational work.

Several other studies could have been included in this literature review. For instance, the study on eight Norwegian organisations that examined the relative influence of values on core organisational functions came close to investigating values work as institutional work in organisations (Aadland, 2010). However, the study did not identify values work and the practice of values, per se. Zilber (2009) adopted a narrative approach to exploring how forms of institutional work can translate meta-narratives into organisations and the lives of individuals. Identifying process as symbolic institutional maintenance, Zilber (2009) highlighted how stories represent values and meaning. The study used a rape crisis centre in Israel as a case organisation and examined institutional maintenance as narrative acts but did not specifically identify values work.

Another work that could have been included is by Kraatz (2009), which revisits Selznick's (1957/1983) perspectives. Kraatz portrayed a leader as both the 'agent of institutionalism' and the defender and steward of the organisation, which is a living social entity. Values work executed by a leader can have implications for organisational legitimacy, governance and change. However, in this chapter, I am investigating how values work becomes a distributed activity within the whole organisation rather than who is doing values work and how it becomes the responsibility of leaders.

A recent article discusses how values practices are performed collectively through the practice of grass-roots exchange networks in crisis-stricken Greece (Daskalaki, Fotaki, & Sotiropoulou, 2018). The study builds on Gehman et al.'s concept of value practices and explores the value systems of different networks and how they reconfigure economic values. However, the study describes economic actions and solidarity at a macro-level instead of identifying structures of values work within organisations. Hence, it was not included in the review.

Defining Values Work

How do the six studies identify the concept of values work? Gehman et al. (2013) were the first to introduce the concept of *values work* as ongoing performances situated in everyday practice and manifested it in emerging and performed value practices. Vaccaro and Palazzo (2015) go beyond this description of values work and highlight how the performative power of values could contribute to the construction of the described reality. Building on Schwartz (1996, p. 2), they defined values as 'desirable, trans-situational goals' and interpreted them as motivational factors and guiding principles in people's lives, which could challenge and change highly resistant institutions. Hence, the values work studies hold a *performative view* of values in organisations (Gehman et al., 2013) stating that values are found in evolving practices (Dewey, 1939).

Gehman et al.'s (2013) perceptions of values work and practices are building on practice theory, which suggest that people's practices direct their right or wrong behaviour. Their definition of values practices—'sayings and doings in organizations that articulate and accomplish what is normatively right or wrong, good or bad, for its own sake'—is influenced by Schatzki's definition (2012, p. 14) of practice as an 'open-ended, spatially-temporally dispersed nexus of doings and sayings'. The studies leaning on practice theory seems to lack an important dimension of values as ideals or as 'desirable modes'. The word 'desirable' (which is different from 'desired' [Parsons, 1968]) mentioned in classic definitions of values by for instance Kluckhohn (1951) and Van Deth and Scarbrough (1998) draws attention to what is wanted or sought as an attractive, useful or necessary course of action, as standards for actions. It also lends values a normative direction (Scott, 2014), indicating a close relationship between morality and work of the 'common good' (Lawrence, Leca, & Zilber, 2013). To orient values practices towards standards for behaviour and the capacity to imagine alternative possibilities for future actions, I therefore expand Gehman et al.'s definition of values to the sayings and doings in organisations that articulate and accomplish *the desirables* in relevance to right and wrong action and behaviour.

The Institutional Context of Studies on Values Work

Regarding the institutional context of values work studies, values work has been either studied in highly institutionalised organisations, recognised as *social systems* (Aldrich, 1992) or in groups described as *associations* or *grass-roots organisations,* characterised by 'participation in collective political activities open to everyone' (Togeby, 1993). Associated organisations are established with a clear agenda: micro-processes of values work help promote a political mission and encourage the common good. For example, the grass-roots movement of Addiopizzo promoted values in a context where institutions were highly resistant to change, by working against the *pizzo* or protection money, in a mafia setting (Vaccaro & Palazzo, 2015). Another grass-roots organisation encouraged uniting against child sexual abuse in the Catholic Church (Gutierrez et al., 2010). A third study investigated an innovation that allowed anyone to author news on a newly established web-based platform (Perkmann & Spicer, 2014).

Organisations that function as open social systems frequently develop strong normative and cognitive belief systems as part of the rules, norms and ideologies of the wider society. The formal structures of these organisations can reflect rationalised myths (Meyer & Rowan, 1977) and may contain weakly connected elements that make them loosely coupled systems (Meyer & Scott, 1992). Researchers of institutionalism in Scandinavia have, through case studies, investigated the dynamic aspect of ideas circulating within institutions. 'Translation' tends to occur where ideas are co-constructed in ways that change the meaning and content of the ideas circulating in a field (Sahlin & Wedlin, 2008).

Studies on values in open systems have investigated how integrity is reinforced through the practice of an honour code (Gehman et al., 2013). Professionals maintain their values despite changing their organisational practice (Wright et al., 2017), and this awareness of moral values shapes the organisation's identity (Aadland & Skjørshammer, 2012).

Studies have identified not-for-profit organisations as being highly sensitive to institutional influence (Greenwood, Oliver, Sahlin, & Suddaby, 2008). However, more studies should investigate how circulating ideas, when translated, can be reframed in terms of the ideology of the recipient organisation.

Values Work in Investigating Institutional Processes

While the concepts of values work are highly influenced by practice theory, the studies in this review are also informed by a strong-process orientation (Langley, Smallman, Tsoukas, & Ven, 2013; Langley & Tsoukas, 2010). In process studies, attention is focused on how and why things emerge, develop, grow or terminate over time in organisations (Langley et al., 2013). Process studies aim to unpack events to help understand complex activities and transactions that take place in organisations and contribute to their constitution (Langley & Tsoukas, 2010). Processes not only point inwards to activities within the organisation but also reflect the responses and pressures from the outside.

Process studies offer a relevant perspective to investigate values in an organisation, especially to examine how values emerge and are performed at different times. The process perspective investigates values as changing or as maintained along with the mechanisms influencing these processes. When investigating values work, Gehman et al. (2013) identified a process: values emerge out of 'pockets of concern', tying local concerns into an action network. People at different organisational levels were performing actual values practice, circulating values dialogues to foster development and institutionalisation (VanderPal & Ko, 2014). This process was also reported in a study by Vaccaro and Palazzo (2015) where the actor, Addiopizzo, organised resistance to the payment of *pizzo* by putting up posters all over Palermo, containing a short message: 'A society that pays the pizzo is a society without dignity'. Addiopizzo's process work reinterpreted institutions that paid pizzo and meaning of dignity in the fight against institutions highly resistant to change.

Reviews mostly describe strong processes in organisations (Langley & Tsoukas, 2017); however, a question worth asking is whether reviews provide an understanding of values work as part of the institutionalising processes at organisations. The role of values, as included in ongoing institutionalisation processes, and how values influence actions, agency and institutions have not been thoroughly described in any of the review articles.

Values Work Enhancing Normative Dimensions of Work

The analysis of the review studies shows that even though values work rests upon a normative pillar that introduces prescriptions and valuation dimensions into social life (Scott, 2014), this seems to be an underexamined theme. Gehman et al.'s (2013) notion of values practices as 'right and wrong practice' suggests that a close relationship with morality is desired in working for the 'common good', though this is not elaborated in the text. Phillips and Lawrence (2012) identified 15 different forms of institutional work, none of which are described as involving moral or ethical work. Wright et al. (2017) noted that moral emotions arise from situations of value conflicts in interactions between organisational members, but they only considered emotions as mobilised by problems and not as part of moral reflection. Aadland and Skjørshammer (2012) are rather alone in highlighting that work on values can introduce an ethical sensitivity but do not mention the mechanisms directing this work.

Outcomes of Studies on Values Work

The outcome of studies on values work can be separated into two. First, these studies contribute to the identification of the values process itself: How it emerges, changes and shapes activities. Second, values work in several studies is connected to the formation of an organisational identity.

In the studies by Gehman et al. (2013), Vaccaro and Pallazzo (2015), and Perkman and Spicer (2014), values facilitate a process of searching for hidden meanings and mechanisms that constitute value practices (Gehman et al., 2013). Vaccaro and Palazzo (2015) identified how values can be used strategically to highlight normative tension and drive change. Change agents in institutional change processes use the performative power of values work to change institutions that are highly resistant to change. Perkmann and Spicer (2014) showed how values work is part of an organisational bricolage. The symbolic material (values) is vital to structuring particular organisations. Additionally, values practices are identified to mobilise organisational practices, re-articulate social relations and promote sustainable living (Daskalaki et al., 2018).

The contributions of values work towards identity formation are especially evident in the studies conducted in churches or faith-based organisations. Values are invoked politically to restore values in a crisis (Gutierrez et al., 2010). For instance, crafting a 'split identification' was a values work mechanism for repairing the identity of the church dealing with the accusations of child sexual abuse by Catholic priests. Awareness of organisational values and mutual work and self-reflection influence the identity formation of a faith-based institution (Aadland & Skjørshammer, 2012). Leaders play a special role in cementing the ideological profile of faith-based institutions (Askeland, 2014).

As a spin-off of the mentioned values work studies, is a growing body of research investigating the effects of value practices and how they are encouraged in organisations (Daskalaki et al., 2018). Although these studies explore different directions, two broad themes can be identified. Some have started to use the term 'values practices', by extending the performative understanding to different arrangements for social change and maintenance. For instance, values practices are interpreted as restoring human values in times of crisis, leading to sustainable living conditions (Daskalaki et al., 2018). They are also highlighted in understanding the tensions between public organisations and the management (Chanut, Chomienne, & Desmarais, 2015) and in the protection of an organisational identity (Desai, 2017).

The second theme involves investigating how human and individual values are relevant to organisational practice. For instance, studies have

examined the influence of counter-ideal values (Van Quaquebeke, Graf, Kerschreiter, Schuh, & van Dick, 2014), the relationship between organisational humanity values and commitment (Husted, 2018), and how social entrepreneurship can mitigate value concessions (Mitzinneck & Besharov, 2018).

Based on the analysis of the review studies, a notable aspect in the studies is the notion that no study to date has investigated how values animate the 'value-spheres' of institutional logics and the practice of social order. Drawing on Weber (1946/2012), Friedland explains that institutional logics are composed of a multiplicity of 'value spheres'. Confirming the 'validity of such values' is a 'matter of faith', which individuals seek and for which they claim to be instruments. Each value sphere is teleologically consistent in exercising 'power over man' (Friedland, 2013a, p. 28). According to Friedland, Weber sees all value rationalities as religious: on the one hand, one seeks to possess the divine in the moment, and on the other, one is an instrument of the divine, acknowledging God's creation and participating in the perfection (Friedland, 2013b, pp. 18–19).

Within each order, there are sets of expectations for both the individual and the organisation (Friedland & Alford, 1991). When expressed, these distinct practices manifest the material substance of the logics, organising them in time and space and giving them meaning. For example, the material practice of the value sphere of compassion can be expressed through rites of care that alleviate people's suffering, which gives the logic instrumental and ritual content. Integral to the production of institutional logics is a valuation of a judgement on what to do. Thus, institutional logics have a normative dimension in that they are organised around actionable goods that are of value to the world (Friedland, 2017, p. 12).

Over the last decade, the literature on institutional logics has broadened the understanding of the institutional processes of organisations (Thornton & Ocasio, 2008; Thornton, Ocasio, & Lounsbury, 2012). Studies have emphasised the coexistence and mingling of logics (Purdy & Gray, 2009; Reay & Hinings, 2009) and the effect of shifts in the dominant logics (Lounsbury & Boxenbaum, 2013). Mainly identified at

the societal level, institutional logics can also be found within organisations where they are used to legitimise the institutions' language and practice (Alvesson & Sköldberg, 2009; Zilber, 2017). Recently, there has been a call to investigate institutional logics from the bottom-up, in order to add micro-aspects to the study of institutional logics (Zilber, 2017). However, to understand how institutional logics construct, shape and modify activities over time, more research is needed on how values work is a part of the internal practice of logic.

Future Research on Values Work

The six articles on values work and the more recent stream of values practice studies indicate a renewed interest in values and values work in organisational research. All the studies in this literature review are informed by a process perspective. They are focused on matters within organisations and consider values as distributed activities, embedded in practice and constantly evolving. In the context of institutional work, scholars note that values play a role in the interaction between actions and institutions and in the social order that influences activities. However, what remains unclear is whether the current studies on values work are trying to integrate perspectives on how values contribute to constructing people's understanding of reality. A central question is how institutional complexity triggers values work.

More research is needed on the role of values in institutionalisation processes. How do values influence actions, agency and institutions? For instance, scholars should analyse the link between institutional work and institutional leadership in order to understand how fundamental values become institutionalised through work. More information is needed on which rules to follow, which authorities to obey and which strategies leaders should adopt to reconcile conflicting tendencies in organisations and to negotiate leadership in for instance multicultural workplaces. It would also be interesting to explore how managers go beyond core values and value codes to facilitate processes that tie in purpose, values and the character of the organisation.

Future research should also investigate values work in organisations and how it shapes individual behaviour in everyday life, especially in volunteering activities, in establishing different values in public governance and in developing reflexivity and values consciousness. Additionally, studies should explore core values and how managers negotiate them within the context of a thriving and distinct organisational values discourse. Finally, researchers should attempt to understand how institutional logics construct, shape and modify activities over time by examining how values work may be part of the internal practice of logic.

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4

Institutional Complexity Challenging Values and Identities in Scandinavian Welfare Organisations

Stephen Sirris

Introduction

Performative and processual practices are embedded. This insight is fundamental in this book. In turn, embeddedness implies a renewed attention to the notion of context, which is often taken for granted and seldom specified. The present volume explores how organisational actors perform values work in institutional contexts that are characterised as complex and plural. This chapter contributes to this aim by investigating how such institutional complexity relates to values work in organisations.

Organisations often experience complexity that challenges their basic values and identities. This is particularly the case with welfare organisations as the conditions framing them are changing, and traditional boundaries between public, private and civic organisations have blurred (Barr, 2012; Billis, 2010). Such development can be positive when it enables the emergence of new styles of organising as well as innovative

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managerial and professional practices (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011). However, it becomes challenging for welfare organisations when they are compelled to simultaneously adhere to different prescriptions. Potentially contradictory sets of 'rules of the game' stemming from various sectors are conceptualised as institutional logics that affect welfare organisations (Thornton, Ocasio, & Lounsbury, 2012). Different logics generate complexity that challenges established patterns of values and identities (Reay & Hinings, 2009). Such complexity in turn may trigger values work. This chapter exemplifies this phenomenon by studying the interface of a welfare logic and a market logic in the context of Scandinavian welfare organisations.

Institutional logics are defined as 'the socially constructed, historical patterns of material practices, assumptions, values, beliefs, and rules by which individuals produce and reproduce their material subsistence, organize time and space, and provide meaning to their social reality' (Thornton & Ocasio, 1999, p. 804). Scholarly works on the topic have focused on organisations relating to multiple logics. This approach attends to shifts in institutional logics and how organisations react to institutional complexity, 'the incompatible prescriptions from multiple institutional logics' (Greenwood et al., 2011, p. 317). This chapter captures the complexity associated with the notion of coexisting logics, offering insights into contradictions in commitments and practices in Scandinavian welfare organisations.

The present chapter serves two purposes. First, it maps the institutional terrain of the majority of the case organisations discussed in this volume. To do so, I provide an overview of the institutional logics perspective and apply it to the context of the Scandinavian welfare mix. Most of the case organisations are public or civic; otherwise, they are organisational hybrids situated at sectorial intersections. Hybrids integrate 'fundamental and distinctly different governance and operational principles in each sector' (Billis, 2010, p. 3). Such organisations experience hybridisation of central organisational arrangements in terms of both structure and culture, and not least in terms of values. The second purpose of this chapter is to investigate from a theoretical perspective the relation between institutional complexity and values work. The organisations in this volume are relevant cases because they identify as values

salient in ideological, political, religious and humanitarian aspects. Thus, this particular organisational landscape constitutes a fertile ground for exploring intra-organisational values work.

The research question guiding this chapter is *How does institutional complexity affect work on values and identities in Scandinavian welfare organisations?* The following section offers some insights into the institutional theory perspective. I study institutional complexity as coexisting logics, and I particularly address reconfigurations of sectors that in turn provide actors with the institutional building blocks for their values work. I then outline aspects of the Scandinavian institutional context and welfare mix by highlighting the overarching changes and trends that frame the organisations and precondition values work. My main argument is that institutional complexity is itself a mechanism that necessitates and triggers values work.

Institutional Complexity

Complexity has always been considered a key element of institutionalism. Various sub-streams within institutional theory address connections between organisations and the contexts in which they operate. This interest is evident in the classical old institutionalism represented in Selznick's (1957) work that studied organisations in relation to their environment. For Selznick, institutionalising was a process of value infusion by which the organisation developed a character or an identity that distinguished an institution from a mere technical or instrumental organisation. In the 1970s, classical new institutionalism emphasised complexity in terms of cultural heterogeneity affecting organisations and considered the rational actor a myth. This trajectory prompted interest in the role of the environments and the field that organisations occupied rather than the organisations per se. Meyer and Rowan (1977) emphasised culture and cognition and described isomorphism—organisational similarity, despite complexity, as an expression of conformism and legitimacy-seeking processes. The notion of isomorphism was extended by DiMaggio and Powell (1983) who provided theoretical explanations about the field level of organisations by proposing coercive, normative and mimetic sources.

Since the 1990s, scholars have sought to integrate classical old and new institutionalism. This trajectory is called 'change and complexity' institutionalism (Johansen & Waldorff, 2017). It seeks to understand how pluralism is handled within organisations. In their seminal work, Friedland and Alford (1991) explained society as a complex inter-institutional system. They enriched institutionalism by suggesting a meta-theory that pointed to the multiplicity of institutional orders in society: family, religion, capitalism, bureaucracy and democracy. Each of these orders is guided by a specific logic that manifests in actors' language and identity and may denote contradictory practices and beliefs (Friedland & Alford, 1991). In most studies, the concepts of order and logic are used interchangeably. Logics at a meta-level with values, norms and symbols are more abstract social structures than institutions as patterns of behaviour (Johansen & Waldorff, 2017, p. 54).

A wealth of literature depicts logics as contradictory. However, inside organisations, logics may peacefully complement each other or compete. Researchers have used concepts like coexistence, hybridisation, compatibility, heterogeneity, ambidexterity and centrality (Jarzabkowski, Smets, Bednarek, Burke, & Spee, 2013) to address the coexistence of institutional logics within an organisation and examine organisational responses to various demands. Experts have noted that friction between coexisting logics inhibits the potential for agency and change (Micelotta, Lounsbury, & Greenwood, 2017). This insight is crucial, since it links institutional complexity conceptualised as coexisting logics to values work.

In this chapter, institutional theory provides the tools to analyse how values and identities are embedded in wider systems that both enable and constrain them (Thornton & Ocasio, 2008, p. 103). However, individuals not only respond to logics as recipients, they also participate in enacting and shaping logics as actors. Actors are the carriers of logics; they represent and voice logics (Greenwood et al., 2011). The logics perspective is related to values and identities primarily through identification by institutions with collective identities such as organisations or professions (Thornton & Ocasio, 2008, p. 111). When such identities are institutionalised, distinctive logics are developed. Values are inherently connected to identity—the enduring, unique and central characteristics of

organisations (Albert & Whetten, 1985). Values express identity, and the two have the following properties in common. First, they are not easily replaced. Second, they are related to the organisation's distinctive history (Selznick, 1957). Third, values are the hallmark of centrality and indicate what is important; hence, they are orienting devices. This sets the scene for the institutional complexity that characterises welfare organisations.

To conclude, logics are a framework for analysis of interrelationships between institutions, individuals and organisations (Thornton et al., 2012). Overall, they provide schemata of interpretations and are inherently connected to practice, providing guidelines for action and enabling actors to create meaning. In turn, the institutional logics perspective is a useful tool to analyse institutional complexity and actors' values work within organisational contexts.

The Context of the Scandinavian Welfare State

This section describes an evolving and changing welfare logic within the Scandinavian welfare state. Salamon, Sokolowski, and Haddock (2017) show that large welfare states and vibrant civil societies and voluntary sectors are not mutually exclusive. Rather, they are in symbiosis. A relatively stable combination of strong welfare states, market economies and civic engagement is common to Denmark, Norway and Sweden. The universal welfare model is the dominant institutional environment and an important backdrop for organisations in Scandinavia (Henriksen, Strømsnes, & Svedberg, 2018). Greve (2007) argues that universalism is the hallmark of a welfare state, which guarantees a certain minimum standard for the welfare for all its citizens. The welfare state pursues goals of full employment, strong commitment to equality, high level of taxation and public spending on services (Barr, 2012).

Denmark, Norway and Sweden cover a distinct geographic region. These countries also share a historical and institutional heritage. For centuries, common kingdoms have connected them. After the reformation, the church and state power came together in the form of the

Lutheran state church. Together, they provided the basis for a unified public responsibility long before the modern welfare state. The nineteenth century marked the beginning of popular mass movements such as peasant, labour, mission and teetotalism. These movements gave rise to large numbers of local organisations, ranging from sports and leisure clubs, religious associations and welfare institutions catering to education, health and social services. In their review of such organisations, Henriksen et al. (2018) claim that the welfare state has been a success of solidarity. The Scandinavian countries are non-authoritarian democracies with powers extensively decentralised to the local level. They are characterised by strong egalitarianism, gender equality and cooperation between the sectors. This explains why Scandinavia ranks high on values like trust, participation and equality and low on poverty and deprivation. The rates of volunteering in Scandinavia are the highest across Europe, yet the public is heavily involved. Today Scandinavia is technologically and economically advanced with a mobile and well-educated population. Denmark, Norway and Sweden have a culture of homogeneity, yet see changing demographics because of increasing immigration.

On examining the notion of welfare state, the Danish sociologist Esping-Andersen (1990) observed three predominant and different welfare regimes, based on enduring constellations of institutions and alliances of classes. First, social democracies are home to a system that encompasses all inhabitants in terms of fundamental needs related to education, health and social services. These are largely sheltered from the market. This is contrary to the second, more liberal, regime where the market attends to these needs through insurances and services paid directly by users. The third, conservative, regime is characterised by the state and workers' insurances covering the basic needs. In some areas, these services are partly differentiated by payments. Esping-Andersen (1990) finds Scandinavian countries to be the closest examples of a social democratic regime. Historically, the countries developed in alliance with the working class and farmers and eventually based in the wider middle class, supporting the welfare state. Further, Esping-Andersen (1990) describes decommodification processes, which refers to individuals becoming less dependent on the family and market

because the state is ubiquitous in most aspects of society. In Scandinavia, individualism is somewhat paradoxically combined with a state-friendly sentiment.

Introducing a Market Logic

Although Scandinavian countries are characterised by a welfare logic, this logic has also been contested in Scandinavia. Towards the 1980s, the welfare state crisis was heavily debated. The crisis was related to financing, new technology, globalisation, the changed context of policy-making introduced by the EU and the new demand for welfare because of changes in demography and the labour market (Lægreid & Christensen, 2011). The challenges of the welfare state were met by several reforms, which aimed at making the public sector more effective and efficient by introducing a market logic as the solution to severe problems.

The basic idea of the reforms based on a distinct market logic, term New Public Management (NPM), was to transfer business-inspired ideas into the public sector (Røvik, 2007). These reforms were developed for several reasons and particularly to have more efficient organisations, accountability and economic measures. NPM originated in the 1970s in an Anglo-American context. At the core of the ideology is an emphasis on management, the separation of firms into independent result units, increased competition and contracting. NPM is based on two pillars (Lægreid & Christensen, 2011). The first pillar is economic efficiency and a criticism of the bureaucratic welfare state. This stemmed from the idea that choices of citizens should be enhanced as customers. Managerialism is the other pillar, sharpening the divide between politicians and administration. Management through objectives became common, and organisational units and managers were to report on goal achievement.

The Scandinavian countries sought to maintain their welfare state and simultaneously make it more efficient. This called for a new coexistence of the traditional welfare logic and the market logic of NPM. The liberalistic turn was not as strong as that experienced in other Western countries because of Scandinavia's unique historical and institutional context,

described above. For example, long-standing cooperation and partnership between the public and civic sectors are dominant features in Denmark, Norway and Sweden. Further, the Scandinavian work-life model refers to the tripartite relations of state, work unions and employers. Given these traditions, the state of Norway has been called a 'reluctant and hesitant reformer' with regard to NPM (Lægreid & Christensen, 2011). This statement succinctly encapsulates the complexity experienced by the Scandinavian states. On the one hand, the NPM reforms were lauded for the efficiency they introduced to combat bureaucracy and in favour of marketisation, network solutions and measuring results. On the other hand, NPM was criticised for its liberalistic ideas and market logic, which presupposed that individuals maximise their own benefits, diverging from the traditional public ethos. Sceptics did not deem the market logic appropriate for the public sector, since political-democratic systems have a normative base.

Importantly, when the welfare logic was confronted with a market logic, public organisations found that their basic values were at stake. Even identities were re-articulated since public agencies were now conceptualised as organisations (Røvik, 2007). Consequently, the development outlined above had an impact on the central values in the public ethos—the core values of responsibility, transparency, justice and equality. It also affected the ethical dimension represented in the values of the professional culture in public service production (Busch & Wennes, 2012). The logic shift in Scandinavian welfare organisations is rooted in these tensions and dilemmas that indicate a changed and hybridised welfare logic.

Changes Affecting Public Values

The public sector in Scandinavia is called a moral community because it is committed to fundamental values like democracy, community and justice (Christensen, Lægreid, Roness, & Røvik, 2014). Public organisations are responsible to citizens and the elective rather than the shareholders.

Public values are complex as they encompass democracy, loyalty, openness, predictability, professionalism and equality. Such values are challenged by market values such as effectivity and rationality. While these values are not a novelty in the public sector, they tend to be emphasised differently than in for-profit organisations. Efficiency is promoted often by criticising excessive expenditure and providing more welfare for less money.

The market logic, as displayed in NPM, downplays the typical characteristics of different sectors, as private models and governance are transferred to public organisations. Thus, NPM reforms have contributed to reducing differences between public, private and civic sector organisations (Greve, 2007). The boundaries between the three sectors have changed through interventions—primarily legislations that regulate sectors—and in the Scandinavian context limited marketisation. Barr (2012) describes various types of resource allocation and their relation to production, regulation and financing. By changing structures in public organisations, the market has an impact on institutional conditions. The regulative interventions through which this logic was introduced may in turn have influenced normative and cognitive institutions. This is reflected in isomorphism and institutionalised organisational scripts (Røvik, 2007). This development is evident in the recurrent debates about the welfare state among the state, market and civic sector in terms of providing services (Barr, 2012; Henriksen et al., 2018).

In sum, welfare organisations have experienced increased complexity that might be conceptualised as clashes of institutional logics, each with its own sets of values. The government is now focused on results: decisions are decentralised and objectives are defined for financing. A market logic has made its impact, yet it may be concluded that traditional patterns of bureaucratic administration have not been replaced (Lægreid & Christensen, 2011). Importantly, post-NPM reforms emphasise cross-sectoral coordination and integration, unlike NPM reforms, which created disintegration and fragmentation. Post-NPM reforms pursue seamless services to citizens, which is challenged by the freedom of choice and fragmentation associated with NPM. Evaluations of NPM show that Scandinavian countries have not adopted the market logic easily. Rather, elements from this logic have been translated and incorporated

into a new welfare logic on the grounds of modernising the public sector (Christensen & Lægreid, 2010). This development testifies to how logics coexist and constitute institutional complexity.

The Welfare Mix

The institutional changes framing welfare have led to a shift from government to governance in several European countries (Barr, 2012). Essentially, older bureaucratic manners of welfare provision were insufficient, and it paved the way for other welfare providers to enter the field, such as commercial and voluntary agencies. This phenomenon is known as the welfare mix. According to Bode (2006), versions of the welfare mix manifest in contract culture and marketisation, and Anglo-Saxon countries are at the forefront of this trend. It essentially denotes the distribution of public financed welfare, health care, social service and education between public, private and civic sector providers. Institutional complexity and heterogeneity mark this phenomenon since it is located at the interplay between sectors.

Sivesind (2016) claims that the Scandinavian countries are a laboratory for testing the regimes proposed by Esping-Andersen (1990) rather than exhibiting a unified welfare model. There are clear differences between the three countries in terms of the welfare mix. Denmark has traditionally had the highest proportion of civic sector welfare services (Sivesind, 2016). This situates Denmark between Norway and Sweden on the one side and the conservative European model on the other side. Statistics from 2013 show that in Norway, the civic sector accounts for 7.8% of welfare services, in Denmark 13.8% and in Sweden 3.2%. The private sector has a 13.4% share in Norway, 19.2% share in Sweden and 7.1% share in Denmark. Norway is dominated by public services, yet commercial versions are common in primary health services. Sweden has strongly prioritised public services; however, a turn towards privatisation has occurred in recent decades.

Coexisting Logics in Welfare Organisations

The complex changes described above in the welfare mix organisations essentially depict the blurring of boundaries between the public, private and civic sectors. Hybrids are organisations that embed conflicting demands in a complex institutional environment (Greenwood et al., 2011). Hybridity is a concept that denotes crossovers between species. It refers to the combining components that are not normally found together. In social studies, it has been applied differently. It is used, for example, for civic organisations that have entered the market. In such cases, logics from other sectors are heavily influenced by civic organisations. Thus, hybridity may be considered a hallmark of the civic sector (Evers, 2013; Jäger & Schröer, 2014).

The taxonomy of organisations within each sector is detailed. This fact challenges the notion of a sector as a fixed gathering of organisations with common structural features. Dominating logics or principles are central to categorising sectors (Billis, 2010, p. 47). The private sector is marked by an economic rationality, where organisations adapt to the market in order to ensure long-term survival. Aiming at profit, private organisations engage in the production of goods or delivery of services in the market to respond to consumption demands. In contrast, the public sector has a democratically elected leadership and is marked by accountability towards many, often contradictory, concerns, goals and values. It protects and promotes the welfare of the citizens and distributes resources. Lastly, Anheier (2014) claims that multiplicity is the signature of the civic sector. Characteristics such as private, non-profit, self-governed and voluntary are typical of these organisations. Their purpose and mission are particular focal points as civic organisations contribute to attachment, reciprocity and community. In summary, the task of the market is to create values, that of the public is to distribute values and that of the civic sector is to promote certain values.

The Sectors as Ideal Types

In order to specify hybridisation, some ideal types are presupposed. This is the starting point, though in reality these are better placed on a continuum. Table 4.1, based on Jäger and Schröer (2014, p. 1293) and Billis (2010, p. 55), shows the three sectors as ideal types.

Hybrid Civic Organisations and Values

While the first part of this chapter adopted a public sector perspective, in this section, I elaborate the position of the civic sector. The civic logic or identity has been articulated by Jäger and Schröer (2014). After NPM, civic organisations have begun to increasingly operate in the market, yet they have served, for long, as welfare providers on contract with public authorities. The logic or main principle underlying the civic sector is the use of identity as a means to a higher end. Identity is collectively rather than individually framed. Consequently, civic organisations are intractably normative and public because of their identity as a moral community. Studies on motivations of volunteers point at a congruence between individual values and those of the organisation (Henriksen et al., 2018). This provides an opportunity for individuals to express their values through actions. Civic collectives are characterised by solidarity and trust as they are embedded in social networks and take action in solidarity. These practices are particularly value-salient as they aim to serve the greater good.

Civic organisations are observed to have a pioneer and entrepreneurial function, and they seek to fill the gaps in private or public service provision (Henriksen et al., 2018). A fundamental question facing these organisations is how to balance and integrate marketisation into their specific identity and civic mission. The market is driven by rational organisations pursuing their goals and self-interest. Hybrid organisations between the market and the civic sector may find themselves in the paradoxical situation of trading solidarity for resources. The development of civic organisations implies market-oriented transactions, regulated by contracts as well as legislation. Risk is being commercialised

Table 4.1 Characteristics of ideal type sectors

Core element	Private sector principles	Public sector principles	Civic sector principles
Ownership	Shareholders	Citizens	Members
Governance	Share ownership size	Public elections	Private elections
Operational priorities	Market forces and individual choice	Public service and collective choice	Commitment to unique mission
Distinctive human resources	Paid employees in *managerially* controlled *Firm*	Paid public servants in legally backed *Bureau*	Members and volunteers in *Association*
Distinctive other resources	Sales, fees	Taxes	Dues, donations and legacies
Values	Create and process material values	Distribute values	Create, maintain and process immaterial values
Identification	Fulfil societal need by acting in self-interest	Collective notions and common good	Self-understanding as a means to achieve higher collective goal
Identity	Utility	Utility and normative	Normative

by the exchange of resources and receipt of funding. Hybrids integrate dual logics or identities in their central dimensions. The starting point for the market logic is that individuals freely enter such network as a means to their own purposes.

Among the cases presented in this volume, some of the organisations are faith-based or diaconal, which originated to express the social, moral or religious values of their founders. Some emerged within religious communities and associations in Europe or America that established institutions to provide social and health services to disadvantaged groups. These represent non-governmental organisations (NGOs) 'whose identity and mission are self-consciously derived from a religious tradition, and which operate on a voluntary, non-profit and independent basis to promote articulated ideas about the common good' (Askeland, 2015, p. 37). Although modern Scandinavian mentality relegates religion to the realm of private life, religious non-governmental organisations (RNGOs) represent a unique hybrid of religious beliefs and sociopolitical activism at all levels of society.

Lacking the authority of the public sector and motivated by values-based rather than profit-based objectives, civic sector organisations are characterised by networks of citizens seeking to change the status quo in the interest of the public good. From the time of their founding, NGOs have identified as moral entities, seeking to alter inequitable distributions of power and resources in favour of the disenfranchised. The 'becoming business-like of non-profit organizations' is confirmed in a review of 599 studies (Maier, Meyer, & Steinbereithner, 2016, p. 64). The institutional logic perspective is an established perspective to study this phenomenon.

> Traditional non-profits are characterised by the co-presence of different logics because there is mostly a degree of hybridity to be found in all of them. Civil society is thus conceptualized as an intermediate area between the market and public sector. Similarly, (…) researchers describe the tensions between different logics within organizations as normal tensions or dilemma. (Jäger & Schröer, 2014, p. 1237)

For civic organisations, marketisation represents challenges in terms of values and identities. It denotes a 'Faustian pact' in which an organisation

may lose its identity in exchange for resources, influence and delivering more services. The cost is 'those fundamental attributes which made it an attractive proposition in the first place, its mission, values and voluntary contribution' (Billis, 2010, p. 10). Value-salient organisations are bound to have non-negotiable values. For them, 'confusion over identity might be a chronic fact of life' (Billis, 2010, p. 246) that triggers values work.

Overall Discussion

This chapter discusses how institutional complexity affects values work and identities of Scandinavian welfare organisations. Public and civic organisations are by nature complex (Anheier, 2014) and characterised by coexisting logics. With welfare organisations becoming more heterogenous, generalisations and strict categorisations are difficult. Hybrids are organisations that mix or integrate elements, action logics and value systems from differing sectors in important dimensions of organisational form or practice (Jäger & Schröer, 2014). They may thus be called multi-identity organisations (Pratt & Ravasi, 2016). Against this backdrop, a specific challenge facing organisations is value convergence with for-profit organisations and mission drift.

Central to my argument is how institutional change triggers values work and hence organisational identity. An organisation pursues its natural purpose and organises this pursuit. Processes of institutionalisation imply infusing the organisation with values which, in turn, shape its character or identity (Selznick, 1957). There is an intractable relationship between values and identity as values mediate organisational self-understanding (Pratt & Ravasi, 2016)—in the same way as personal traits express aspects of a person. When a market logic challenges, supplements or rejects traditional public values, the very identity of public or civic organisations is destabilised. Profound reforms thus have considerable impact on identities (Røvik, 2007). The challenging of public values, norms and organisational identity by a market logic can result in loss of identity, problems associated with multiple identities, dissolutions of old identities, exchange of identities or an identity crisis (Busch & Wennes, 2012).

Incorporating a market logic has allowed commercial, civic and public organisations to provide welfare services in novel ways (Bode, 2006). Both commercial and civic organisations collaborate with the public sector and are denoted as welfare hybrids (Wollebæk, Selle, & Lorentzen, 2000). This development is particularly related to increased governance or managerial structures and professionalism. By accepting public funding and supplementing services, civic organisation must meet the demands of equality in services and professional competencies. However, they are also accountable to the demands of the private sector, which include environmental sustainability and the triple bottom line concept.

Welfare organisations are as such situated in a unique institutional environment, characterised as pluralistic and complex. Current institutional change, as discussed above, manifests in a questioning of public values as well as challenged identities. This phenomenon is evident in recent decades in the increased attention paid to the identity and character of organisations, in terms of values and self-presentations. Core values are a medium for conveying such identity externally and internally. Legitimacy is also considered a chronic problem of organisations (Billis, 2010), which have to cater to their constituencies and stakeholders. Organisations are supported by their environments inasmuch as there exists a perceived congruence in values. This argument may suggest a singular and fixed identity and set of values—which may be articulated in core value statements—yet organisations are pluralistic, multi-functional and complex (Pratt & Ravasi, 2016).

An illuminating study by Wæraas (2010) found that public organisations adhere to less bureaucratic and more relational values such as respect, tolerance and honesty. This reflects a major trend within organisations towards de-bureaucratisation and towards structures that are changing and flexible. Another development is that organisational setups have become more temporal and ad hoc, based on projects, teams and matrixes or networks. The focus on values reflects expressive aspects where reputation management becomes an ongoing challenge and is taken for granted (Røvik, 2010).

The above-mentioned trends in complexity emphasise that organisations are expected to articulate their identity through values. It is no longer possible to assume what an organisation is, what tasks it should

perform and how. A solution to these challenges is to develop and construct an attractive and unique identity that differentiates the organisation from others. According to Wæraas (2007), such processes may occur in two ways. First, a unique identity can be developed over time through the natural perspective described in classical old institutionalism (Selznick, 1957). The identity is collectively and internally developed and emphasises the organisation's distinct mission and values. This presents an institutional or normative perspective, in which managers have limited abilities to change the identity in an instrumental way. The evolution of such identity occurs in a specific context, wherein the act of comparison with others is crucial. Over the last decades, welfare organisations compare themselves increasingly with private organisations, by incorporating a market logic. This situates welfare organisations at the boundaries of different logics, which in turn increases hybridisation and the search for identity. The second approach to crafting a unique identity may be considered more strategic and thus an instrument for the management (Wæraas, 2007). This identity stems from utility and supports the governing of organisations by visions, values and missions that are clearly defined. It is based on a prospective view of how the organisation should exist at a point in the future and thus highlights the distance between the actual and desired identity. While this may imply a risk of losing the soul of the organisation, it can also be an impetus for strategic development and managerial agency that aims to re-articulate the organisation's values and identity.

Moreover, a third approach is described by Askeland, Espedal, and Sirris (2019) who compared work on values and identities in three faith-based organisations. In these case organisations, religious traditions had permeated the identity of the organisations that now found themselves embedded in a secular society. In other words, they experienced institutional complexity. Through strategic efforts, values to some degree mediated aspects of religion yet also served to bridge the Christian tradition with expectations from the secular society. Thus, a renewed identity was forged through values work that simultaneously both integrated and adjusted. The combination of safeguarding and developing buffered the organisations from entering the above-mentioned 'Faustian pact'. These

organisations hybridised the welfare and the market logic guided by a commitment to values and without losing their identity.

Concluding Remarks

This chapter offers insights into how institutional complexity relates to values work in Scandinavian welfare organisations. First, I have argued that the institutional logics perspective offers an analytical framework for institutional complexity. I have illustrated this by introducing readers to the Scandinavian context and exemplified how the logics framework is applicable in this particular context. The chapter draws attention to organisations operating at the cusp of sectors. Such organisations face institutional complexity though coexisting logics, as explained with the help of the Scandinavian welfare state and the evolving welfare mix. Second, on a theoretical level, I have shown how institutional complexity relates to values work. Values are part of the institutional logics perspective and resources that managers may draw from in their work. Various sets of values emerge from logics as reality is endlessly rich and pluralistic. Values work represents an embedded agentic response to both institutional policy changes and the challenges of institutional complexity. The chapters in this book provide examples of how institutional complexity triggers values work.

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Part II

Who Performs Values Work?

5

Institutional Leadership—The Historical Case Study of a Religious Organisation

Jose Bento da Silva

Institutional Leadership as Institutional Work

Notwithstanding institutionalism's relevance within organisation studies, the leadership of institutions is a topic that we can classify as largely overlooked. As an example, the 2008 edition of the *SAGE Handbook of Organizational Institutionalism* had a chapter on 'Institutional Leadership' (Washington, Boal, & Davis, 2008); however, the 2017 edition of the same volume has less than one page devoted to the leadership of institutions (see Kraatz & Block, 2017, p. 552).

Two reasons might contribute to the lack of studies on institutional leadership. First, institutionalism 'is creaking under the weight of its own theoretical apparatus' (Haveman & David, 2008, p. 588). This means that something as 'simple' as defining what an institution remains unclear. This limitation of institutionalism affects a plethora of concepts within the field: 'As these concepts become more general and cover a

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greater territory, their explanatory power weakens' (Alvesson & Spicer, 2018, p. 8). Second, leadership, although arguably the most studied topic in organisation studies, also remains a contested field. More specifically, 'the field of leadership studies has traditionally been leader-centered' (Crevani, Lindgren, & Packendorff, 2010, p. 77). Such characteristic of leadership studies hinders its integration into institutionalism with its emphasis on what is beyond the individual. Not surprisingly, then, there is 'a lack of institutional leadership ideas in the leadership literature' (Washington et al., 2008, p. 11).

That said, the leadership of institutions haunts some strands of the literature on institutionalism and neo-institutionalism. Two examples are 'institutional entrepreneurship' and 'institutional work'. On the one hand, the type of leadership needed to create or change an institution remains largely overlooked; on the other hand, even though institutional work 'link[s] quite well' (Kraatz, 2009, p. 59) with institutional leadership, the possible linkages have not been further explored.

Institutional work was initially defined as the 'purposive action of individuals and organizations aimed at creating, maintaining and disrupting institutions' (Lawrence & Suddaby, 2006, p. 215). That said, institutional leadership can be understood as part of 'institutional work'. As Kraatz puts it, leadership is part of 'the work involved in *governing*, *adapting*, and *reforming* organizational institutions' (Kraatz, 2009, p. 60, emphasis in the original). This leaves aside the work done by entrepreneurs to *create* an institution. However, it does include the work done to *reform* and *adapt*, id est, *change*, which is part of the work done by institutional entrepreneurs. Such overlap does attest to the fact that some of the concepts within institutionalism end up meaning 'everything and nothing' (Alvesson & Spicer, 2018, pp. 7–8). Therefore, in this chapter I will attempt a clarification of what institutional leadership is, of how it might be distinguished from institutional work more broadly and of how it can enlighten our own understanding of what stands for an institution. The latter is particularly important because it will help us to better delineate what separates the leadership of an institution from the leadership of an organisation. This has more potential to enlighten our understanding of institutional leadership if we analyse

an organisation which is itself an institution or part of a highly institutionalised field. Such organisation is the Society of Jesus, commonly known as the 'Jesuits', a Catholic Religious Order. This way of defining the Jesuits already points towards several distinct levels of analysis. First, the Jesuits are a religious organisation, and, in this sense, they could be simply classified as an 'organisation'; second, the Jesuits are a Catholic Religious Order, which refers to an institutionalised 'form-of-life' (Agamben, 2013) within Catholicism; third, Jesuits are part of the Catholic Church which is one way of ordering life within the institutional order of religion.

In this chapter, I will analyse the Jesuits vis-a-vis the value of poverty. The reason for this choice is that poverty is a value that is shared by the various institutional levels I described above: poverty is the pillar of all Jesuit values (Jesuit institution); poverty is one of the three vows that any member of a Catholic Religious Order should do (the institutionalised 'form-of-life' (Agamben, 2013) that characterises any Religious Order member); and finally, poverty as an evangelical value should be pursued by any Catholic (the institution of the Catholic Church).

Methodologically, I will analyse historical primary sources that span almost five centuries. I will start by analysing how poverty became the fundamental value of the Jesuit organisation. This discussion will position the Jesuits in the poverty debates that go back to the twelfth century (see Agamben, 2013); then I will analyse government documents of the Jesuits relating to poverty, namely their General Congregation decrees and instructions on the management of their property.

The analysis of how poverty was conceptualised and governed over almost five centuries will allow us to revisit the relevance of values for understanding institutional leadership. Selznick famously said that institutions are 'organizations infused with value'. (1957, p. 17) and that, as a consequence, institutional leadership is about 'the promotion and protection of values' (Selznick, 1957, p. 28). However, this definition raises the question of 'how leaders can guard against the tendency to lose sight of institutional values' (Besharov & Khurana, 2015, p. 60)? This chapter will contribute to this discussion by showing, through the Jesuit case, how the institutional leader's role might be not about the preservation

of values, but about the constant search for specific values. This insight furthers our understanding of 'procedural logics' (Quattrone, 2015) and its critique of our obsession with the substantiation of values.

The Jesuits

The Jesuits are a Catholic Religious Order. Within Catholicism, there are two main forms of life. First, secular life, 'Secular' means 'living in the world', and therefore outside the 'walls of a monastery'. Second, religious life. Those who live a religious life, traditionally inside the walls of a monastery, do it in seclusion and take the three vows of poverty, chastity and obedience. Religious Orders are organisations whose members adopt a religious 'form-of-life' (Agamben, 2013).

The Jesuits, as a Religious Order, are not secular insofar as they take the three religious vows of poverty, chastity and obedience. However, unlike traditional monastic religious orders, the Jesuits were founded so that their members would live immersed in the world. Therefore, the Jesuits did not adopt the most emblematic of monastic orders' traditions, like the choir, the communal prayers and the monastic habit (O'Malley, 1993).

The fact that the Jesuits were not like other monks, living secluded within the walls of a monastery, led their founder, Ignatius of Loyola, to revisit many of the institutionalised ways of ordering religious life. Put differently: How can you live a chaste, obedient and poor life outside the walls of a monastery? Or, put yet in a different way: What are the effects of living outside a monastery on the understanding of the institutionalised values of chastity, obedience and poverty?

The three values of chastity, obedience and poverty are equally important in religious forms of life. Notwithstanding, for the purposes of this chapter we will focus on the value of poverty for two main reasons. First, poverty was part of important debates within the Catholic Church that go back to the thirteenth century (Agamben, 2013). This means that from an institutional point of view, the value of poverty within Catholicism has a century-old history. Second, and most importantly, poverty was considered by Ignatius the 'wall that protects the life of a Jesuit':

'*Poverty, as the strong wall of the religious institute, should be loved and preserved in its integrity as far as this is possible with God's grace. The enemy of the human race generally tries to weaken this defense and rampart which God our Lord inspired religious institutes to raise against him and the other adversaries of their perfection. Into what was well ordered by their first founders he induces alterations by means of interpretations and innovations not in conformity with those founders' first spirit*' (Jesuit Constitutions, §553).

Poverty thus emerges as a fundamental value of (a) religious forms of life and (b) the Jesuit order in particular. Furthermore, as I will discuss in the following sections, the value of poverty is critical to understand the institutional leadership of the Jesuit organisation.

Ordering Individual Values

As Agamben (2013) highlights, what underpinned the mediaeval debates around poverty was the possibility, strongly denied by the Catholic Church of the thirteenth century, that an individual could renounce their natural right to property. Such a possibility is made visible in the sixteenth-century text of the *Spiritual Exercises* (SE), as follows: '*it is necessary to make ourselves* ***indifferent*** *to all created things, in regard to everything which is left to our free will and is not forbidden. Consequently, on our own part we ought not to seek health rather than sickness,* ***wealth rather than poverty****, honor rather than dishonor, a long life rather than a short one, and so on in all other matters. Rather, we ought to desire and choose only that which is more conducive to the end for which we are created*' (SE, §21, emphasis added). All this so as '*to overcome oneself and* ***order*** *one's life, without reaching a decision through some* ***disordered affection***' (SE, §21, emphasis added).

The absence of any form of desire towards material goods/wealth thus becomes one of the values underpinning the Jesuit organisation. Poverty at the individual level is therefore translated as indifference towards wealth and poverty. That said, what becomes the target of ordering at the individual level are the affects: the important aspect is not materiality, but how the individual relates to it, how they feel and which affections are brought to the surface in regard to material objects.

'*Disordered affections*' (SE, §21) are affects that make the individual desire one thing more than the other. Indifference is therefore not a specific way of behaving, but a guiding desire (Certeau, 1973) of individual action: the individual only desires to become totally indifferent to outcomes that are equally good (Geger, 2012). This raises the question: if one is supposed to be indifferent to wealth and poverty, what is the role of poverty?

The indifferent individual and the absence of desire (Certeau, 2000) need to be constantly self-monitored, insofar as they are never fully attained: actions, thoughts and desires are permanently monitored and accounted for (see Quattrone [2004] for a discussion of this issue vis-à-vis accounting). In the SE, indifference is neither the target of any specific form of speech, nor is it framed as a form of 'counter-conduct' (see Munro [2014] for a discussion of counter-conduct). Indifference is simply defined as we have outlined above. However, even though the SE are a process whose logics are procedural and non-substantiated (Quattrone, 2015), they are performed under the guidance of what is called a *Spiritual Exercises* director. This means that the individual never performs the SE alone, but always under the guidance of someone whose function is to help assess the order or disorder of the individual's affections. It is through the constant and regular dialogue with the SE director that the individual orders their life and assesses their indifference. The SE's logics are therefore not only procedural (Quattrone, 2015), but also dialogical and relational. This is akin to Anteby's (2013) emphasis, when discussing the case of Harvard Business School (HBS), on those members of the faculty who are the guardians of the shared understanding about what constitutes HBS's moral pursuit. Anteby (2013) highlights the relevance of recruitment, socialisation and leadership for large-scale organisations which pursue moral projects, even though they do not substantiate what morality consists of, as in the case of HBS. The Jesuit organisation also emphasises, in its Constitutions, the vital importance of recruitment, socialisation and leadership. However, unlike the case of HBS as described by Anteby (2013), silence is replaced by processes that foster dialogue with an SE director or Superior/manager so as to reach a shared understanding of what constitutes indifference, eventually leading to individual and organisational order. We expand on this below through an analysis of the Jesuit Constitutions.

Ordering the *Corpus'* Values

Arguably, the most important aspect to consider when approaching the Jesuit Constitutions is their structure. In accordance with the modern way of charting thought (Ong, 2004), the Constitutions follow a determined order in the presentation of subject matters (Coupeau, 2010). That order is based on practical considerations, which means that the aim of the Constitutions, which is the proper governance of the Jesuit *corpus*, is only stated in the final chapters. The Constitutions can and should be analysed according to this, simultaneously taking into consideration that the aim of this legislative text is to fully regulate the governance of its members aligned with their characteristic '*way of proceeding*'. However, unlike monastic Rules, the Jesuit Constitutions do not substantiate every detail of the monk's life (Aldama, 1989; Coupeau, 2010). Instead, the Jesuit Constitutions outline a '*way of proceeding*' which is akin to what Agamben (2013) calls a 'form-of-life'.

The Jesuits Constitutions are divided into 10 chapters which trace the development of the indifferent Jesuit and the governance of the Jesuit *'corpus*'. The first 5 chapters deal with the socialisation and training of a Jesuit; Chapters 6 and 7 deal with the specificities of religious life, including poverty, and Chapters 8 through 10 deal with the governance of the entity. However, the outlining of a uniform 'form-of-life' (Agamben, 2013) does not occur via a detailing of everyday life, as in monastic rules (Agamben, 2013), but is achieved through the replication of a set of experiences. These experiences, part of the training of any Jesuit, are replicated over and over again. Among those experiences is the practice of the *Spiritual Exercises* (Constitutions, §65), to work for one month in a hospital (Constitutions, §66), to go on a pilgrimage (Constitutions, §67), to teach (Constitutions, §69) and to experience poverty (Constitutions, §254, §285, §287). In accordance with the rhetorical underpinnings of the Jesuit Constitutions (Coupeau, 2010), Chapters 6 and 7 represent the outcome of what is experienced after the 'training' the Jesuit underwent, and which is described as the Jesuit way of living a religious life. Part of this religious life is a life of poverty.

However, before we explore what it means to live in poverty, it is important to describe how indifference is framed within the Jesuit Constitutions: '*The members of this Society ought to be ready at any hour to go to any part of the world where they may be sent by the sovereign pontiff or their own superiors*' (Constitutions, §588). Put simply, indifference means to be fully available to go to any part in the world and perform any activity. This availability was, at the time, quite unusual, because life in the monasteries was characterised precisely by what Weber (1968/1978) termed '*stabilitas loci*': after joining a monastery, a monk would spend his entire life in that same monastery, and have his day entirely regulated with great minutiae (Agamben, 2013).

It is intriguing how the Jesuits devised a '*way of proceeding*' that represented an extraordinary shift in comparison with other religious forms-of-life, which were focused mainly on ordinances (Aldama, 1989). The reason for such an option is well known: the need for flexibility and adaptability to different geographical locations (O'Malley, 1993). The Jesuit geographical dispersion, and the emphasis on the flexibility of the individual and the '*corpus*', rendered it impossible to construct life 'as a total and unceasing liturgy or Divine Office' (Agamben, 2013, p. xii), to share the monastic Rule's tension between the private and the communal, to put at the centre the *habitus*, to order life via the '*horologium*' or to enclose life in a disciplinary apparatus (Agamben, 2013). Even so, the Jesuit Constitutions shared with other forms of religious life an emphasis on poverty as a key tenet of such a life.

Agamben (2013) discusses how Franciscan monastic Rules pointed towards a 'form-of-life' in which a theory of use (use of a property that is not individual, but communal) translated itself into an ethos, a form of life: '*What was in question (…) was not the rule, but the life, not the ability to profess this or that article of faith, but the ability to live in a certain way*' (Agamben, 2013, p. 93). This means that the 'way' that was appropriate for monastic orders was poverty (Agamben, 2013). The Franciscans' rule and the identification of life with its form (a rule as a form-of-life) represented, in the thirteenth century, a major shift in the pastorate, one that Foucault (2009) does not acknowledge, but which Agamben (2013) explores. Although the first 5 chapters of the Jesuit Constitutions point

towards a coincidence between the form (the Constitutions and the experiences they devise) and life, they do represent a shift in the understanding of what a religious form of life meant.

Ordering a Poor Way of Life

Poverty is fundamental to understanding how order is achieved in the Jesuits. Poverty is about a 'way of life', not a substantiated 'rule of life'. We expand below via an analysis of the '*Statutes on Religious Poverty in the Society of Jesus*' (SRPSJ).

Poverty has three dimensions: individual poverty, expressed through a formal poverty vow that each individual undertakes; communal poverty, which relates to how the local community of Jesuits experiences poverty and finally a 'common way of living in external matters' (SRPSJ, article 3). First, individual poverty, which is about renouncing the natural right to property, points towards a 'theory of use' (Agamben, 2013): 'No one should have the use of anything or dispose of it as his own' (SRPSJ, article 1, 21, §1). This means that the individual has no property, but the community may have. This leads us to the second dimension, that of communal poverty. Communal poverty is made visible by a common 'standard of living' (SRPSJ, article 2, 28, §1) in which 'superfluities are always to be avoided' (SRPSJ, article 2, 28, §2). However, what is superfluous is not substantiated. The third and final dimension of poverty refers to a 'common way' of living in poverty and deals with 'external matters' (SRPSJ, article 3). The objective of this third dimension is to foster a 'common way' of being poor, without, again, ever substantiating what 'being poor' means. 'Being poor' is always referred to as an imitation of those who are poor. However, what characterises poverty or an individual as being poor is never defined. Poverty is a 'manner of life', something which is 'entirely authentic', 'not becoming illusory' (SRPSJ, Part 1, §G) and to 'be adapted' in '*creative fidelity*' and 'active indifference' (SRPSJ, Part 1, §F, §R).

There is one element in the Jesuit Constitutions and in how poverty is conceived that may pass unnoticed: the role of the Superior/manager. The Jesuit Superior, just as in the case of the SE director, is the guardian

of poverty. However, unlike the Abbot of the monastery, his role is not to guarantee that the minutiae outlined in the Rules are observed, but to allow for a '*way of proceeding*' to be developed. The Jesuit '*way of proceeding*' unfolds (Quattrone, 2015) through a constant dialogue between the Superior and the individual, and between the Superior and the community he manages. It is not that the Superior commands poverty, but rather that what constitutes a poor 'manner of life' emerges out of constant dialogue. It is precisely in this sense that the logics underpinning Jesuit rationality are not only procedural (Quattrone, 2015), but also dialogical and relational.

Leading a 'Poor' Corpus

Unlike monastic orders' 'forms-of-life' (Agamben, 2013), the Jesuit '*corpus*' was an expanding global corpus in which the remote controlling of a geographically widely dispersed 'population' of individuals apparently underpinned the development of a unique constitutional framework (Knowles, 1966). However, the Jesuit constitutional framework revolves around 'indifference' and is not guided by any specific organising objectives, established purposes or objectified moral pursuits or values. Jesuit indifference can be made visible through the treatment accorded to poverty and to what Agamben (2013) defines as a 'theory of use'. In the case of the Jesuits, we see that use is more than the refusal of the individual's right to property. Jesuit poverty, and its underpinning theory of use, is about active indifference to material goods; in addition, it is about the ordering of a poor life via the manufacturing of a poor individual, a poor community and as a consequence a poor '*corpus*'. It is not the Jesuit 'corpus' which imposes a particular conception of poverty on its members; poverty emerges out of individual indifference to material goods and is constructed relationally and in ambiguous terms. The only driver of poverty is indifference, which in this context means the absence of desire for any specific material goods.

The '*way of proceeding*' is the only rule the Jesuit organisation has. Ordering the globally dispersed population of individual Jesuits is the result of the construction of a 'form-of-life' (Agamben, 2013) (or '*way of*

proceeding') in which the form (the rule) is coincident with the individual's life (Agamben, 2013). However, whereas in traditional monasticism this was done within the confines of the monastery, as Agamben (2013) highlights, the Jesuits were not bound by any space that could 'in-form' their life. Indifference was what 'in-formed' life: 'each one ought to be ready to undertake whatever may be assigned to him' (Constitutions, §302).

Conclusion

Selznick describes the process of institutionalisation as one in which flexibility is lost: 'the enterprise gains the stability that comes with a secure sense of support' (1957, p. 7). The Jesuit order is interesting precisely because of how it balances stability with constant accommodation to local circumstances: be it at the individual level, or at the community level. In this sense, poverty is not a stable value. Instead, poverty is a value to be constantly interrogated. And it is the process of interrogation what poverty means that is stable (institutionalised), and not the understanding of what poverty is. Poverty is therefore not the result of 'conscious design', but of 'unplanned adaptations to new situations' (Selznick, 1957, p. 12). This allows the Jesuit order to evolve, change and adapt without 'significantly changing the role and character of the organization' (Selznick, 1957, p. 12).

However, if the changing understandings of poverty are not consciously designed, what is left for institutional leadership? Selznick (1957) provides us with an answer: '*the more precise an organization's goals, and the more specialized and technical its operations, the less opportunity will there be for social forces to affect its development*' (p. 16). And it is precisely in those situations in which '*goals are less clearly defined*' (Selznick, 1957, p. 16) that institutional leadership is most needed. This contradicts our heroic view of leadership, according to which the leader is responsible for leading towards clearly defined goals, preferably defined by the leaders themselves. Institutional leadership thus emerges as 'a kind of work done to meet the needs of a social situation' (Selznick, 1957,

p. 22) in which the goals of the organisation are problematic instead of stable.

Selznick's (1957) insights are corroborated by the Jesuit case. More specifically, the idea that the 'less clearly defined' (Selznick, 1957, p. 16) the goals are, the more we need leadership is concomitant with the relational nature of leadership manifested in the Jesuit case. However, the Jesuit case furthers Selznick's intuition insofar as it frees it from the heroic view it seems to imply. Institutional leaders are not the only ones who protect and promote the institution's values. Instead, such protection and promotion emerge out of the relational nature of leadership that characterises Jesuit leadership. The constitution of poverty is the result of the dialogue between the Jesuit leader and their followers, which allows the Jesuit organisation to constantly adapt according to different times and places. Jesuits can operate in extreme contexts of poverty as well as in privileged contexts; individual Jesuits, unlike members of other Catholic Religious Orders, have no rules regarding the way they dress (the monk's habit is traditionally an exterior sign of poverty). These are examples of how the value of poverty is open and ambiguous, which is precisely what allows the Jesuits to adapt so easily to multiple contexts.

Such openness raises interesting questions regarding institutionalisation processes. The intuition that leadership is most needed when the organisation faces ambiguity is rather easy to grasp. However, institutionalisation processes always imply some form of stability which is at odds with openness and ambiguity. Moreover, the Jesuit case shows that leadership is not needed only in situations of ambiguity understood as extraordinary situations. Instead, ambiguity is understood as constitutive of the values guiding the institution: it is not that poverty needs to be redefined when the context asks for it; the point is that poverty is ambiguous by its own nature. Put differently, values and meanings do not need to be substantiated so as to generate action and maintain an institution (Quattrone, 2015). Institutional leadership and institutional work thus emerge as relational in their own nature: they are not about the maintenance, protection and promotion of specific institutional values, but about the constant interrogation of what such values mean according to different times and places.

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6

‘Good Leaders Do the Dirty Work’: Implicit Leadership Theory at the Multicultural Workplace

Tone Lindheim

Introduction

Today, workplaces are increasingly culturally diverse, and managers and employees interact across various societal cultures. Facilitating communication and cooperation among individuals to accomplish shared goals is central to leadership, and multicultural workplaces represent new challenges and opportunities in this regard. This chapter proposes values work as a strategy, inquiring into the implicit ideas of good and bad leadership at the multicultural workplace with loosely held cultural categories. The aim of the chapter is to examine the factors that shape managers’ and employees’ implicit ideas of leadership and to analyse how leadership is negotiated in everyday interaction across cultures. Three nursing homes in Oslo, Norway, are the empirical context of the case study.

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A Critical Review of the Comparative Paradigm of Cultural Universals

The relevance of culture to leadership is well established, especially through large-scale studies that have developed cultural universals or dimensions for comparing cultures at the societal level (Hofstede, 2001; House, 2004). In much of cross-cultural management research, these cultural dimensions are strongly linked to values (Hofstede, 2001; House, 2004; Mustafa & Lines, 2016). In the GLOBE project (House, 2004), the dimensions developed to measure and compare societal culture are referred to as values orientations. In the same vein, Mustafa and Lines (2016) reviewed the literature on culture and leadership and analysed the interaction between societal level values and individual values. However, this approach in cross-cultural management—identifying culture with values—has been criticised for ignoring other aspects of culture that frame leadership practice, such as societal structures and legal frameworks (Alvesson, 1989; Nathan, 2015).

A theoretical concept that describes the relationship between societal culture and leadership in the comparative tradition, and in the GLOBE project in particular (House, 2004), is 'culturally endorsed implicit leadership theories' (CLTs). The central tenant of implicit leadership theory is that managers and employees bring to their daily interactions implicit, taken-for-granted ideas of good and bad leadership (Eden & Leviatan, 1975). Building on implicit leadership theory, the GLOBE project aimed at extending the theory from an individual level to a societal level, arguing that implicit ideas of leadership are culturally contingent and culturally endorsed (CLT). To gain acceptance and support from employees, managers must therefore take culture into account and behave in a manner that matches the culturally contingent expectations of the specific society. CLT can then be identified and measured at the societal level and compared with those of other societies. This theory of culturally congruent leadership has gained broad support within cross-cultural management research (Green, 2017; Mustafa & Lines, 2016); however, it has also been criticised for promoting a static and essentialist understanding of culture (Fang, 2005; Mahadevan, 2017; Nathan, 2015).

Phenomena like globalisation and migration make cultural configurations more complex and blur the lines that mark the societal level. Macro-level comparative approaches in cross-cultural management have been criticised for offering a perspective on culture that does not align with the reality of today's multicultural workplaces. Further, the use of cultural universals to sensitise individuals to cultural differences has been criticised for reinforcing stereotypes and essentialising aspects of people's social identities (Nathan, 2015; Witte, 2012). This is why researchers have called for alternative, in-depth qualitative approaches that analyse the complexity of leadership and culture in multicultural environments (Fang, 2005; Mahadevan, 2017).

In line with this criticism, this study argues that the macro-level comparative approach to culture and leadership offers a flawed perspective on the interplay of culture and leadership at the workplace. The approach is too narrow in that culture is reduced to values, and it is too broad when culture is identified at the societal level. To understand culture and leadership at the multicultural workplace, it is necessary to broaden the gaze, beyond values, to include the larger institutional context and to narrow the gaze to inspect more specific local organisational factors.

Exploring Implicit Ideas of Leadership at the Multicultural Workplace

Through a case study in three nursing homes in Oslo (Norway), this study explores implicit ideas of leadership at the multicultural workplace and the different sources that shape these ideas. In line with practice theory (Nicolini, 2012) and the 'Leadership-as-practice' tradition (Raelin, 2016), this study locates leadership in the practice as it unfolds at the workplace. The study analyses how leadership is negotiated in the everyday interactions of managers and employees. Such negotiation involves an exchange of ideas of good and bad leadership to arrive at a common frame of understanding (Børve, 2008, p. 17) as well as specific leadership practices (Børve, 2010).

The present study seeks to analyse culture in a way that does not confine it to societal or national boundaries. Culture is a social phenomenon enacted at different levels: societal, organisational and group (Mahadevan, 2017). Culture is tied to collectives and as such draws boundaries between insiders and outsiders (Borofsky, 1994). But contrary to the comparative paradigm described above, the boundaries are multiple, shifting, incongruent and overlapping. Thus, although culture is a collective phenomenon, it is enacted by individuals embedded in a variety of cultural contexts and belonging to several different cultural collectives simultaneously.

The present study draws on elements from the GLOBE project, particularly the concept of CLTs, but seeks to use the concept differently. Implicit leadership theory provides a useful framework for understanding how managers and employees negotiate leadership at the workplace, but the cultural configuration of organisational members at the multicultural workplace is more complex than what is suggested by the GLOBE project. Organisational actors embody unique cultural configurations that vary for instance with their first-, second- and third-generation country background and the time spent in their current country of residence. Other collective identities like gender and profession add to their individual cultural configurations (Witte, 2012). In this chapter, I argue that these dynamic cultural configurations play a central role in shaping the implicit ideas of leadership and that to improve communication and cooperation at the workplace, it is more fruitful to inquire into these than look for societal level scores to measure them.

Applying an institutional perspective, this study broadens the understanding of culture beyond values and identifies different contextual factors that shape the implicit ideas of leadership at the multicultural workplace. Contextual factors can be found at the institutional, field and organisational levels (Scott, 2014). For instance, factors at the institutional level include legal frameworks and regulations like the Working Environment Act and the Basic Agreement between trade unions and the employers' unions (Børve & Kvande, 2018; Byrkjeflot, 2001). These frameworks and regulations are central to the Norwegian culture; they frame leadership practice and regulate the roles, rights and responsibilities of managers and employees. At the field level, characteristics of the

healthcare sector and the professions dominating the sector are contextual factors that frame leadership practice (Zilber, 2012). In addition, the formal and informal as well as technical and ideational features specific to an organisational context (Scott & Davis, 2016) are important for understanding leadership in a local setting.

Research Design and Methods

To explore the implicit ideas of leadership and the negotiation of leadership at the multicultural workplace, a qualitative approach was chosen, and three nursing homes in Oslo were selected for a case study (Stake, 1995). In the Norwegian context, nursing homes represent highly multicultural workplaces. In this study, the share of employees with an immigrant background varied from 69 to 84% of employees on permanent contracts in the units studied. To investigate the complex cultural dynamics of leadership in the nursing homes, I studied one unit with a manager from an immigrant background and one unit with a manager from the majority background in each nursing home.

An ethnographically inspired method that combined participant observation, semi-structured shadowing and interviews was used to study leadership practices as they unfolded in the organisational context. A total of 200 h was spent on observation in the nursing homes. The six unit managers were shadowed for one day each (Askeland, 2015). The other days of observation were less structured and allowed the researcher to participate more freely and observe the interaction between unit managers and employees. After the observation, 27 semi-structured interviews were conducted (see Table 6.1). Interviewees were selected to represent a diverse collection of country backgrounds, professions and genders. Combining observation and interviews helped validate the observations and interpretations by participating objectification (Fangen, 2010, p. 224). All the interviews were recorded and transcribed verbatim by the researcher. The informants and the nursing homes were given fictitious names to protect their identity.

Table 6.1 List of interviewees

Name	Regional background	Position	Nursing home
Anita (f)	Norway	Care assistant	Marigold
Banu (f)	Asia	Unit manager	Riverside
Bente (f)	Norway	Healthcare worker	Riverside
Celeste (f)	South America	Care assistant	Marigold
Dragan (m)	Eastern Europe	Unit manager	Cornerstone
Edel (f)	Norway	Healthcare worker	Cornerstone
Ellen (f)	Norway	CEO	Cornerstone
Faiza (f)	Africa	Care assistant	Cornerstone
Hamza (m)	Africa	Care assistant	Cornerstone
Harald (m)	Norway	CEO	Riverside
Hege (f)	Norway	CEO	Marigold
Hilde (f)	Norway	Unit manager	Marigold
Ingrid (f)	Norway	Nurse	Marigold
Jenny (f)	Asia	Nurse	Marigold
Jodit (f)	Africa	Healthcare worker	Marigold
Jonathan (m)	Africa	Unit manager	Marigold
Justyna (f)	Eastern Europe	Nurse	Cornerstone
Kari (f)	Norway	Unit manager	Cornerstone
Kristin (f)	Norway	Unit manager	Riverside
Marko (m)	Eastern Europe	Nurse	Marigold
Milan (m)	Norway/South America	Nurse	Riverside
Nina (f)	Norway	Healthcare worker	Riverside
Omar (m)	Africa	Healthcare worker	Riverside
Shanti (f)	Asia	Healthcare worker	Riverside
Silje (f)	Norway	Healthcare worker	Cornerstone
Vanessa (f)	Asia	Nurse	Cornerstone
Zahra (f)	Asia	Nurse	Riverside

NVivo was used for thematic coding and analysis of field notes and interview transcripts. The notes from the semi-structured shadowing were coded and analysed in accordance with procedures from previous studies (Askeland, 2015). As recommended for case studies, the different types of data were converged and analysed as a whole (Yazan, 2015). After a preliminary analysis of the data from observation and interviews, findings were shared and validated at meetings in the nursing homes. In terms of transferability of the results, the choice of nursing homes has both advantages and limitations. As mentioned, nursing homes have a high percentage of managers and employees

with an immigrant background, which provided rich opportunities to observe negotiation of leadership across cultures. On the other hand, choosing workplaces where employees with an immigrant background are in minority could generate different results showing a more dominant influence of the Norwegian cultural context.

Implicit Ideas of Leadership at the Multicultural Workplace

The following sections present findings from the fieldwork and interviews. It starts with a presentation of the implicit ideas of leadership in the nursing homes, followed by an analysis of the multiple sources of these ideas: contextual factors and individual experiences. The three managers with an immigrant background are then presented as examples of how leadership is negotiated at the multicultural workplace.

Implicit Ideas of Good and Bad Leadership in the Nursing Homes

Participant observation and shadowing allowed the researcher to observe leadership practices as they played out in the natural work setting, and during observation and interviews, informants described different leadership practices as either good or bad. The ideas of good and bad leadership are presented in Table 6.2. The ideas of good leaders can be summarised as follows: good leaders are visible and present in the unit, they listen to their employees, and they support and fight for their employees instead of simply accepting the demands of their supervisors. Good leaders are communicative, and they recognise the efforts of their employees and speak nicely with the employees. They place themselves at the level of the employees and are not afraid of doing the dirty work. Employees highly value leaders who put on the uniform and share the employee workload. Hilde, one of the unit managers at Marigold, said the following at the validation meeting: 'What my staff really remembers and what I get credit for is that I cleaned the floor in one of the residents' room

Table 6.2 Descriptions of good and bad leadership

Good leadership
• The leader must be available and visible in the unit
• The leader must listen to the employees
• The leader must show some flexibility
• The leader must support the staff and show that they fight for the staff
• The leader must call in substitutes when someone is sick
• A good leader puts on the uniform and isn't afraid of working
• A good leader gives you a pat on the shoulder. It is someone who says you have done a good job today
• A good leader is strict and kind—a good mix of both
Bad leadership
• Bad leaders lock themselves in the office and just sit there; they are not present in the unit
• Bad leaders only think of money and budget
• Bad leaders are very rigid and closed
• Bad leaders are strict with their employees but pander to their bosses

– not that I negotiated a higher salary for them'. In the study, informants' ideas of good leadership reflected general leadership expectations of a flat structure, of involvement and being treated as equals as well as context-specific factors like presence in the unit and putting on the uniform to share common tasks. These expectations were confirmed in the validation meetings.

Contextual Factors and Individual Experiences as Sources of Implicit Ideas of Leadership

Where do the ideas of good and bad leadership come from? From the data, two sets of sources were identified: contextual factors from the institutional, field and organisational levels and individual experiences of leadership from the country of origin and the country of residence.

The first source of implicit ideas of leadership is related to contextual factors. Contextual factors were identified at the institutional, field and organisational levels. As described above, the Working Environment Act is one of the regulatory factors at the institutional level that frame leadership in Norwegian work life. Together with the Basic Agreement

accorded by employers' and trade unions, the Working Environment Act regulates the work environment. These frameworks were frequently referred to in the nursing homes, and employees were conscious of their rights:

> We work under the same rules and the same obligations, you know. And rights. (…) We have the same rights all of us, and the same obligations. So that doesn't worry me. (Omar, health care worker at Riverside)

> Jonathan [unit manager at Marigold] follows the Norwegian rules. If he doesn't, we can complain. (Alvin, health care worker at Marigold)

Employees expected leaders to play by the rules and were conscious of the mechanisms that protected them and regulated the power balance between managers and employees.

The shadowing of the six unit managers showed that being unit managers in a nursing home shaped the manager role in a significant way, which can be attributed to nursing homes as a sector or institutional field. The unit managers engaged in similar types of activities (e.g. supervising clinical work, staffing shifts, attending meetings, responding to emails and phone calls), and they related to the same set of actors (CEOs, other unit managers, employees, residents, relatives of the residents). One of the factors that featured in the list of good leadership was appointing substitutes to compensate for employees on sick leave. Again, the use of substitutes may be attributed to the field level as the healthcare sector is characterised by a relatively high percentage of employees on sick leave, and the completion of tasks depends on the number of hands available. The topic of sick leave and use of substitutes was discussed frequently among the employees.

Organisational factors seemed to cause differences in the patterns of leadership between the unit managers. Tasks included in the job description and access to office space were two examples of such organisational factors. Among the unit managers, the access to a separate office space was not consistent. Jonathan and Hilde at Marigold had their own offices on one floor, while their units were located on other floors. At Riverside, Banu and Kristin did not have a separate office space. For administrative work, they used the computer at the staff room that was accessed by

all staff members. At Cornerstone, Dragan and Kari had private office spaces next to the staff room in their units. The physical conditions of the space where the unit managers spent time during the day influenced how they interacted with the employees and thus the employees' expectations towards their managers.

The tasks included in the unit managers' role descriptions varied between the nursing homes. While all the unit managers were trained as nurses, the extent to which they were expected to participate in the daily care of residents varied. At Marigold, unit managers did not participate in care on a regular basis, but when needed, they would put on the uniform and share the tasks with other employees. At Riverside, Banu and Kristin were counted as part of the staff in care on a regular basis. Since they also had other responsibilities, they often took on the lighter cases or dropped out to attend to other commitments. At Cornerstone, the unit managers participated in care once a week. These differences implied that Banu and Kristin at Riverside wore the uniform at all times, whereas the unit managers at Marigold and Cornerstone wore regular clothes and changed into the uniform only when they participated in care. The degree to which managers and employees share the same tasks and wear the same clothes influences expectations towards leadership practices and the implicit ideas of good and bad leadership. I perceived that unit managers at Riverside, who participated in care on a daily basis and wore the same uniform as other employees, were expected to behave in a more egalitarian way than managers in the other nursing homes.

The second source of implicit ideas of leadership was the individual experiences of leadership from the country of origin and from Norway. Taken together, the employee backgrounds of the informants across the nursing homes represented more than 40 countries. Their time spent in Norway and in the Norwegian education system varied. As such, employees with an immigrant background brought with them a mix of experiences from different countries. One of the most striking patterns in the data was the almost unanimous description of leadership in their country of origin offered by employees with an immigrant background. Despite their different country backgrounds, their descriptions of leadership in their country of origin were far more similar than expected. Leadership

in their country of origin was in general described as hierarchical, and leaders were perceived as inaccessible. The following excerpts from informants of different country backgrounds illustrate this perception:

> In [my country in Eastern Europe], leaders decide everything. There is no room for communication so … they are dictators. Employees do what the leader says, and the leader has absolute power" (Dragan, unit manager at Cornerstone)

> [In my country in Asia] it is something about how they have this great respect for their leaders, that when the leader says it has to be done, they do it. For they are a bit afraid of being punished, you know. For there are consequences. (…) It's good in a way. Like a bit authoritarian. (Vanessa, nurse at Cornerstone)

> In [my country in Southern Europe] you only speak with your leader if there is a problem – something that you cannot solve. You may not even know your leader. (Magdalena, nurse at Marigold)

Although the descriptions of leaders given by employees of different country backgrounds seemed unanimous, they should not be perceived as specific descriptions of leadership in the respective countries. The descriptions were relative—comparing leadership in their country with what they experienced in their Norwegian work context. In the data, there were fewer references to typical Norwegian leadership, but aspects like a flat structure and the approachability of the Norwegian managers stood out. A key factor in the conversations with employees from an immigrant background was that they continuously related to both the culture of their native country and that of their present work country (Norway).

Implicit leadership theory applied to societal level tends to guide one's attention towards commonalities and sharedness of leadership ideas. However, tensions and disagreements were also observed in the data of implicit ideas of good and bad leadership in the nursing homes. In general, the hierarchical and authoritarian leadership style prevalent in their native country was perceived as negative but not without ambivalence, as demonstrated in the quote from Vanessa. She saw being 'a bit authoritarian' as positive and useful in the work context. Other informants

referred to how leaders in the Norwegian context were expected to talk to employees in a polite and nice way, even when criticising or correcting employees. Some of the informants described this as problematic as the Norwegian leaders appeared evasive when employees underperformed. Further, because of the flat structure, some employees with an immigrant background perceived that the employees controlled the leader and not the other way around. Vince, a nurse from Asia at Cornerstone, had a frustrating experience as unit manager at a different nursing home:

> Here, it is the employees who manage the boss. It is "my way or the highway". The smallest thing, and the employees write a deviation report on their leader. "I am protected because I am an employee". Here it is the Working Environment Act and all that stuff.

These examples show that employees were not uncritically socialised into the Norwegian context. They did not simply accept what was considered typical Norwegian leadership as good leadership.

In summary, the implicit ideas of leadership in the nursing homes stem from a variety of sources. Figure 6.1 illustrates how contextual factors at the institutional, field and organisational levels along with experiences of leadership from the country of origin and Norway feed into the implicit

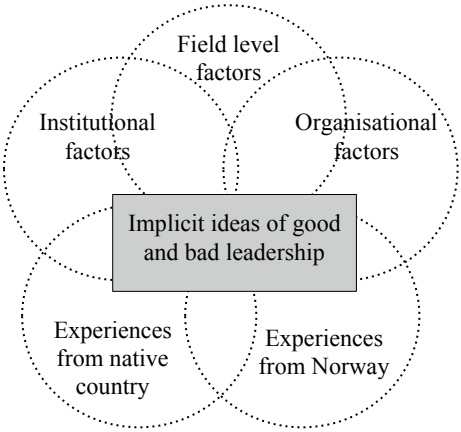

Fig. 6.1 Sources of implicit ideas of good and bad leadership

ideas of good and bad leadership. This illustrates the dynamic cultural configurations of managers and employees in the nursing homes. The figure also illustrates the interplay between contextual factors and personal experiences, showing how for example the structurally given frameworks shape implicit ideas of leadership. The dotted lines point to the permeable and overlapping nature of each of the sources. Their weight and importance vary from person to person.

Negotiating Leadership in the Nursing Homes

To illustrate how leadership is negotiated at the multicultural workplace, the three managers with an immigrant background are presented as examples.

Jonathan (Marigold). Jonathan, from a West African country, had studied nursing in Norway. He had no formal management training when he took over as unit manager about two years prior to the field study. When he took over, the employees in his unit were on sick leave on average 28% of their regular working hours. His major achievement as a unit manager was to reduce this percentage to below 6%. Jonathan, the staff and the CEO at Marigold, attributed this achievement to his leadership style and especially to his visibility in the unit and his flexibility in accommodating the needs of the staff. Jonathan spent little time in the office doing administrative work. Once or twice a week, he stayed back after normal work hours to complete his administrative tasks. Jonathan preferred informal areas for interacting with the staff—the hallway, the kitchen or the resident rooms where he accompanied the staff. When employees asked for changes in their shift schedules, Jonathan tried his best to accommodate. The employees found him understanding and easy to talk with, and he claimed he made an effort to be so. He said that at times, he felt like a social worker but added that the give-and-take was a part of the game: 'If you show them that in case of sick leave, you call in substitutes, within reasonable limits, it works'. When the staff sensed that he made an effort to cover shifts with substitutes, they made an extra effort to not fail him. Overall, Jonathan responded to the core aspects of

the implicit ideas of good leadership in the nursing home and was appreciated and respected for it.

Banu (Riverside). Banu was from an Asian country and had completed her nursing degree as well as management studies in Norway. She took over the unit six months prior to the field work. Banu participated in care on a regular basis, but instead of recognising her for sharing their tasks, the staff complained that she was not doing enough and that they could not rely on her. Further, because she did not have a separate office space, she was expected to be in the unit, and the staff complained when she was not there. The employees described Banu as professionally and theoretically very competent. She was respected for her courage to stand up and take charge in difficult situations with residents and relatives. However, when it came to other aspects of her leadership, the employees were more negative. Banu claimed to care for her staff, but the staff found her harsh and felt that she cared more about budgets and favourable reviews from the top management:

> She is a bit direct. And it is not everybody who likes that. You feel that you are treated very hard sometimes. Nobody likes to be treated badly. Everybody does their best, and still they get "pepper". (…) And then we have heard she is the best to save money. So, it means that she doesn't spend money on calling in substitutes. (Zahra, nurse at Riverside)

When analysed in the context of the implicit ideas of leadership, Banu failed to live up to core expectations of leaders: to be understanding, to remain loyal to employees and to communicate in a soft and kind manner. Her strengths—being performance-oriented, strategy-driven and a visionary—did not align with the leadership characteristics highlighted in the implicit ideas of leadership in the nursing homes; as a result, she did not earn legitimacy or support from the staff. Banu argued that as a leader, she could not expect to receive positive feedback from the employees. The support from the CEO and positive comments from residents and their relatives were more important to her. In a way, it seemed like she had resigned from negotiating leadership with her employees, and the level of conflict with the staff in the unit was high.

Dragan (Cornerstone). Dragan was from an Eastern European country and had started working as a manager about six months prior to the field study. Being a unit manager at Cornerstone was his first formal management position. During the field study period, an employee survey was conducted in the nursing home, and the staff gave Dragan impressively high scores. A striking aspect that was highlighted in the fieldwork and interviews was the autocratic style of Dragan's leadership. He maintained a log of the mistakes and deviations of each employee to gather evidence, and he insisted on being direct when correcting mistakes:

> They are not used to direct feedback. They mean I should wrap it more in and say it in a nice way. No one likes to receive criticism, even if it is constructive. (…) My job is to correct the mistakes and supervise the employees so that they don't make mistakes. So, I need to have this kind of … a bit direct leadership. (…) I need to become dictator as long as we have serious mistakes.

The autocratic tendency was in sharp contrast to what was perceived as good leadership in the nursing homes. So how did Dragan get away with it and receive high scores on the employee survey? It appears that Dragan had special ways of demonstrating affection towards his employees. The employees used emotionally charged words when expressing how much they liked him. Alvin, a healthcare worker from Asia, captured the tension between the affective attachment and Dragan's directness: 'It is kind of like a father. We are the children and get scolded by our father. We are like a family'. Alvin seemed very satisfied with this style. By developing an affective relationship with the staff and creating a family spirit among the employees, Dragan created a space for himself to be direct and, at times, autocratic. Thus, he responded to the core aspects of ideas of good leadership in the nursing home but also renegotiated them to create acceptance for his more authoritarian leadership practices.

How did culture influence the three managers' negotiation of leadership? Interestingly, all of them clearly distanced themselves from the leadership practices in their country of origin and frequently cited ideas of leadership that they had adopted in the Norwegian study or work

context. However, they also deliberately drew on their cultural background as a resource. Dragan specifically noted how his temperament as an Eastern European was different from that of the typical Norwegian and allowed him to connect with the more emotional and expressive temperaments of his employees from around the world. When Jonathan handled permission requests from employees who wanted to visit their home country to care for their family members, he drew on his personal experiences with a sick mother in West Africa and his family members who expected him there. Some employees linked their managers' leadership practices to their country backgrounds even though the managers' self-perceptions indicated otherwise. Other employees argued that it had more to do with the manager's personality.

The examples of the three unit managers show that it is difficult to isolate cultural values from their country of origin or country of residence as factors determining leadership practices. Contextual factors from the institutional environment, the field and the organisation, as presented above, framed their leadership practices. As such, the unit managers drew on a repertoire of resources in their leadership practices. These resources may be traced back to the culture of their country of origin and to the Norwegian context, but also to professional background or leadership discourses that transcend national boundaries.

Concluding Remarks

To enhance communication and cooperation at the multicultural workplace, it is necessary to actively engage with culture and leadership. This study proposes values work as a strategy—inquiring into the implicit ideas of leadership, taking into consideration the dynamic cultural configuration of the organisational members. The study has shown that contextual factors at the institutional, field and organisational levels frame leadership in a significant way. The contextual factors, such as the legal framework, office space and job descriptions, are more than technicalities. They come with sets of value-laden expectations that shape the implicit ideas of leadership and needs to be discussed. The process of values work also requires a space for sharing individual experiences of

leadership across cultures, as these experiences as well frame implicit ideas of leadership. Through values work, managers and employees at the multicultural workplace make their implicit ideas of leadership explicit in a continuous dialogue around legitimate expectations of leaders and employees. The degree to which managers and employees respond to implicit ideas of leadership in a meaningful way impacts communication and cooperation.

The comparative paradigm in cross-cultural management has focused on national or societal level culture scores on values dimensions (Hofstede, 2001; House, 2004). The present study has shown that these scores fall short for two reasons. First, when culture is limited to values, the influence of contextual factors arising from the institutional environment, the field or the organisation is omitted. Second, societal culture scores do not capture the heterogeneity of cultural influence at the multicultural workplace. Hence, this study argues that it is necessary to broaden the perspective—*to zoom out*—to include the broader institutional context. At the same time, it is also necessary to *zoom in*to include the factors specific to the local organisation. Instead of trying to identify cultural universals, which may reinforce stereotypes and stigmatise organisational actors, it seems more useful to examine the implicit ideas of leadership with loosely held cultural categories.

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7

Foxes and Lions: How Institutional Leaders Keep Organisational Integrity and Introduce Change

Marta Struminska-Kutra and Harald Askeland

Introduction

Theoretical considerations presented in this chapter develop empirical findings from multiple case studies of Polish public administration entities struggling to adapt to field-level changes in governance patterns (Bevir, 2011; Gilardi & Radaelli, 2012; Strumińska-Kutra, 2018), particularly to environmental pressures for more inclusive and participatory public management. With the emergence of these pressures, public agencies in many Western and Central-Eastern European (CEE) countries have begun to function within institutional pluralism—between the traditional, hierarchically oriented paradigm of public administration (PA), the market-oriented paradigm of New Public Management (NPM), and the network-oriented paradigm of New Public Governance

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(NPG) (Kordasiewicz & Sadura, 2017). Each of these paradigms prioritises different logics, promotes different values and delivers a different frame for their interpretation. Consequently, each provides a different way of conceptualising the public administration's identity and role in society. Hence, in order to keep legitimacy, public agencies must learn to perform accordingly.

We adopt the institutional leadership perspective by asking: *How leaders build organisational structures that embody new goals and values while at the same time keeping organisational integrity?* While changing their own organisations, how do they gain cooperation from internal and external constituencies and reconcile otherwise conflicting tendencies? We review public administration leaders' interactions with internal and external constituencies to show how leaders choose different strategies of adaptation. Some act as 'foxes', working to associate new rules and practices with old ones. Others represent 'lions', whose goal is to secure the survival of innovations and prevent them from drift or co-optation. This typology of leaders-innovators, briefly mentioned by Selznick, represents indispensable features of institutional leadership that combine cohesive force for change with an understanding that winning consent for new directions depends on how secure the participants feel (Selznick, 1957, p. 153). We explore these two types and supplement them with two others. The strategy of an 'ostrich' responds to environmental pressures for change by faking innovation, or using new rhetoric while in fact resorting to routine. A 'mole' does not even notice new qualities of the situation and reinterprets new expectations in the old, routinised frames. Normatively speaking, the latter two types escape from the *true* functions of leadership that are about defining (new) ends in the face of ambiguity and pluralism, designing an enterprise adapted to these ends, and ensuring that the design becomes a living reality (Selznick, 1957, p. 37).

We contribute to the literature on institutional leadership in two ways. First, we complement a dominant focus on the backward-leaning orientation of institutional leaders (Washington, Boal, & Davis, 2008) by exploring their future-oriented, innovative side. Using the concept of institutional work; purposive action aimed at creating, maintaining and disrupting institutions (Lawrence & Suddaby, 2006), we illustrate how leaders intentionally work to change organisations and their values.

We argue that their actions manifest either through projective, future-oriented agency or through habitual agency by selecting among a set of established routines. Reference to projective and habitual agency constitutes our second contribution, emphasising that institutional leaders act in an arena that is never empty of institutions. In particular, the leader herself is an institutionally embedded individual whose patterns of thinking and acting are conditioned by field-level and organisational institutions. In this messy environment, leaders struggle to build structures that reflect new goals and internalise different or even conflicting values, as well as even deinstitutionalise some. Our typology explicates ways in which leaders respond to these challenges.

Consistent with the aim of this book, we explore how values come into play in situations of institutional pluralism.[1] Our argument is developed in two sections. First, we present Selznick's concept of institutional leadership. Then, we link neo-institutional approaches, nested in the field-level perspective (isomorphism), with the micro-level perspective (institutional work). We present leaders as those who perform the institutional work of translating (plural) field-level logics into organisational structures, as well as those who negotiate the shape of organisational structures with actors both inside and outside of the organisation. The second section presents the typology of leaders/innovators responding to environmental pressures for change by reaching to old and new institutional scripts. We conclude by comparing the strategies and reflect on their effectiveness within the context of institutional pluralism.

Institutional Leadership: Linking Field, Organisation and Actor Levels

The idea of institutional leadership—the promotion and protection of values (Selznick, 1957, p. 28)—does not appear often in contemporary theoretical discussions (Kraatz, 2009; Kraatz & Block, 2017). When it does, it tends to be perceived as conservative and backward leaning

[1]Such contexts are outlined in the introductory chapter (Askeland, Espedal, Løvaas and Sirris) and elaborated on in the chapter of Sirris on institutional complexity.

(Washington et al., 2008). Yet, a forward-looking orientation was prominent in the original concept. According to Selznick (1957), institutional leaders respond to diverse external pressures by making critical decisions that affect the basic character of an enterprise, and these critical decisions go beyond the routine, day-to-day solution of problems. They are about navigating 'uncharted waters', making structural changes that, on the one hand, enable the pursuit of new goals and values and, on the other, recognise the status quo and its limitations. Institutional leadership is about decisions having long-running implications for organisational identity and organisation's role and meaning in wider societal networks. These decisions create conditions 'that will make possible in the future what is excluded in the present' (Selznick, 1957, p. 154). Selznick (1957) argued that such adaptations to new goals 'require a strategy of change that looks to the attainment of new capabilities more nearly fulfilling the truly felt needs and aspirations of the institution' (p. 154).

Selznick located institutional leaders in a 'liquid' and turbulent reality, where it is not (or no longer) clear for an organisation what it *should be* or what it *should do*. In such circumstances, there are four functions of institutional leadership: (1) defining values, mission and role entails an assessment of the organisational commitments set by internal and external demands; (2) building structures creates new organisational arrangements that are sensitive to the existing ones, as well as to ways of thinking and responding that secure the execution and elaboration of the new policy; (3) defending integrity means maintaining values and distinctive identity; (4) ordering internal conflicts means winning the consent of constituent units in order to maximise voluntary cooperation while keeping the balance of power to maintain the fulfilment of key commitments (Selznick, 1957, pp. 62–63).

Contemporary accounts of institutional leadership have developed some aspects of this list. Washington et al. (2008) shifted emphasis from the internal to *external* orientation of leaders, claiming that the leader's function is to develop external supporting mechanisms, thereby enhancing the legitimacy of an organisation, and to overcome external enemies. While viewing institutional leaders' actions as institutional work, Kraatz (2009) supplemented the list with an individual dimension of self-reflection. He suggested that some leaders should also work

on themselves and undergo transformations when experiencing 'complex and anxiety laden social situations' (p. 81). Others have reflected on integrative function while referring to the frame of institutional logics, pluralism, complexity, and organisational hybridity (Besharov & Khurana, 2015; Kraatz & Block, 2017). They called for empirically grounded perspectives on how leaders develop both an organisational and individual identity that integrate potentially diverse goals and moralities, as well as how they foster productive rather than destructive tensions between potentially conflicting views of who the organisation is and should be. We will enhance this perspective by investigating institutional and organisational changes in public administration.

Institutional Pluralism and Public Administration

Selznick's contemporary relevance increases when we consider his references to pluralism in an organisation and its environment. Such pluralism is exhibited in various expectations about organisational roles and identity, comes from diverse organisational stakeholders and foreshadows concepts of institutional pluralism and institutional logics (Gawer & Phillips, 2013; Thornton, Ocasio, & Lounsbury, 2012). Institutional pluralism is the situation faced by an organisation that operates in multiple institutional spheres. Organisations become multiply constituted when they have more than one socially sanctioned purpose (Kraatz & Block, 2017). Pluralism creates internal tensions, shifts objectives and turns administrators into institutional leaders—political players whose actions and choices ultimately shape the organisation's evolution and character. Hence, institutional leadership, when focusing on organisations, becomes a concept of 'gluing' field-level considerations with an individual-level analysis of practices, aiming at the maintenance, transformation and disruption of institutions. At the organisational level, institutional pluralism becomes an operationalisation of Selznickean 'critical experience' (Selznick, 1957, p. 38), calling for institutional leadership, where a range of alternative actions are possible and legitimate, tasks and goals are not defined, and, therefore, routine-based

decision-making is unsuitable. We explore this issue by empirical examples of institutional pluralism and leadership in public administration.

The governance turn is observed in many Western and CEE countries (Denters, 2011). This simultaneous co-evolution of similar patterns of rule in public administration can be perceived as a process of institutional isomorphism (DiMaggio & Powell, 1983; Rządca & Strumińska-Kutra, 2016).

Isomorphic pressures are vehicles through which the disjunction between the values held by society and the behaviour of an organisation is erased. Changes in patterns of rule can be interpreted as a result of growing expectations for more responsive and inclusive public governance. Yet, public agencies still face expectations and pressures aligned with two other paradigms: PA privileging hierarchical logic and NPM imposing the quasi-market logic of effectiveness. The presence of multiple and often conflicting institutional orders, to which public organisations must adhere, complicates the process of isomorphism and legitimacy-building. Values pursued by public administrations, such as social justice and democracy, are understood differently in each of the paradigms. Within the hierarchical logic, public agencies are the final link in a chain of democratic representation. Here, executives enact the 'people's will', expressed in general elections. Network-based logic proposes building up societal and democratic consent through collaborative problem-solving (Ansell, 2011) and participatory forms of democracy. Market-based logic would build consent around the quality and costs of public services. Institutional pluralism poses a challenge to leadership in public administration. Bureaucracy or NPM may be impuissant when it comes to solving complex social problems, but this does not mean that we do not need them anymore (Ansell, 2011; Sørensen & Torfing, 2015).

Institutional leadership is located where policy formation and organisation-building meet (Selznick, 1957, p. 37), and its role is to facilitate a dynamic adaptation to the values inherent in policies. In the face of the governance turn, public leaders are met with several challenges. First, to maintain or (re)create values and structures characteristic of each of the three paradigms. Second, to create and maintain meta-level, shared

values that transcend but do not eliminate paradigmatic divisions (challenge 2, Besharov & Khurana, 2015). The first requires work on integrity at the horizontal dimension, translating external expectations into the organisational structures and negotiating with bottom-up responses and managing tensions between symbolic (values, ideals) and technical (tools, procedures) (Besharov & Khurana, 2015).[2] The second is placed on a vertical axis, focusing on creating and maintaining 'a cap' that holds the parts together.

What has been largely omitted, even by Selznick himself, is that although specific types of institutions might be lacking, it does not mean that the arena of leaders' actions is empty of institutions. Concepts of institutional pluralism and ambiguity suggest that social spaces are never empty of institutions, rather, they can be perceived as *institutional voids* that result from conflict and contradiction among institutional bits and pieces from local political, community and religious spheres (Mair, Marti, & Ventresca, 2012). Network-based coordination, typical for NPG, is introduced into a field already governed by diverse institutions. Even if collaborative approaches are not explicitly built into the organisational structures of public agencies, the institutional environment may deliver a more or less productive ground for establishing such ways of coordination. Horizontal ways of governing are not typical of the Polish institutional environment, which is the subject of empirical investigation here (see also Strumińska-Kutra, 2018). As a result, new collaborative approaches to public management are more easily interpreted according to the traditional hierarchical logic of PA, or to the relatively new but firmly embedded quasi-market logic of NPM. There is a lack of examples proving that horizontal coordination and partnerships not only confine the imagination on the realm of the possible but also reduce the resources necessary to initiate cooperation, most prominently social trust (Putnam, Leonardi, & Nonetti, 1993). This adds a third challenge for an institutional leader because institutionalising a new approach means building new and changing old structures. Some values need to be reinterpreted or even removed in order to make a room for new structures.

[2]See also Askeland's chapter "Maintaining the good organization" in this volume.

A fourth challenge is that the institutional leader herself is an institutionally embedded individual (Zietsma & Lawrence, 2010) whose mindset and actions are influenced by institutions in a field. This sets her in the middle of an embedded agency paradox: How do those subject to the institutions in a field effect changes within them? Paying attention to leaders' institutional embeddedness in a cognitive and normative sense is an important supplementation of Selznick's concept. His original and current contributions portray the leader as a 'super individual' whose identity and perception are not affected by cognitive and normative aspects of institutions. Nevertheless, some of Selznick's remarks do connect to this problem of depicting leaders as individuals with the ability to transcend their own specialisation and who are conscious of their own weaknesses and potentialities (Selznick, 1957).

The Institutional Embodiment of Purpose: Strategies for (Not) Building Integrity While (Not) Introducing Change

In this section, we take a closer look at these challenges by utilising empirical illustrations[3] of public administration leaders involved in processes towards more inclusive and collaborative governing patterns. In Poland, the beginning of these processes was marked by the decentralisation reform introduced in the late-1990s and the introduction of legislation on public participation and access to information at the beginning of the 2000s. The process accelerated in anticipation of EU accession in 2004. The leaders under analysis were acting upon public disputes understood as conflicts 'involving governmental entities and other stakeholders, such as individual citizens, business firms or organisations, over policy priorities, standards, or resources they hope to share' (Susskind, 2000, p. 130). Public disputes are instances where public administration

[3]Empirical investigation was conducted in years 2007–2017 and includes various types of data (interviews, archival sources, notes from observations) covering the time span between 1998 and 2017. Research was funded by the Polish Ministry of Science and Higher Education under the grant number: 2011/01/B/HS4/04935 and by Kozminski University.

comes under direct pressure to implement ideals and regulations following an inclusive and collaborative logic of new policies. In the following examples, stakeholders demanded that public agencies enact participatory modes of governance, organise dialogue where all parties could express preferences and exchange knowledge in response to a given problem. They insisted that their values and knowledge be somehow included in solutions devised to address given policy dilemmas. Since the regulations and policies were new, organisational structures enabling their implementation either needed to be created or were in place but had hardly been practised. Institutional leadership was needed to create new structures and infuse them with vales (and meanings).

Habitual and Projective Agency

The introduction of new, collaborative logic and policy, accelerated by public disputes, questioned the goals and tools of public agencies and disrupted their routines. Following Selznick, we see disruption of routines as a disruption of logics commonly used to solve problems in the organisation (Selznick, 1957, p. 36). Dispute has the potential to create a 'critical experience' affecting the character of an organisation. This is the situation where distinct qualities of institutional leadership can be found. In order to create conditions 'that will make possible in the future what is excluded in the present' (Selznick 1957, p. 154), leaders perform institutional work (Lawrence & Suddaby, 2006). They make critical decisions about how new regulations are to be understood and implemented in practice (Kraatz, 2009).

Selznick's leaders use projective agency, oriented at the formation and implementation of a new policy. Either they are foxes devising new programmes and techniques in cooperation with conservative elements, or lions, who secure innovations need for survival (Selznick, 1957, p. 112). Both roles require institutional innovation and entrepreneurship (DiMaggio, 1988; Maguire, Hardy, & Lawrence, 2004; Zietsma & Lawrence, 2010). Such leaders 'deal with current issues not for themselves alone but for their long run implications for the role and meaning of the group' (Selznick, 1957, p. 37).

Yet, in practice, a failure to set goals, or only their superficial acceptation, is quite common. Below we shift attention to less explored institutional sources of leadership failures. We suggest that leaders may also use habitual agency that replicates existing patterns of thinking and acting.

Combining habitual and projective agency in analysing leaders' responses to pressures enables us to capture both how those subject to institutions in the field can implement changes and, more or less consciously, resist them. The latter in particular opens a venue for the exploration of cognitive aspects of institutional leadership since it addresses questions of institutional inertia (Hallet & Ventresca, 2006; Kraatz & Block, 2017; Mahoney & Thelen, 2010). Following a previous analysis (Strumińska-Kutra, 2018), we combined two types of institutional work: practice work, understood as developing and legitimising practices, and identity work, or developing and legitimising roles and identities (Gawer &Phillips, 2013; Svenningsson & Alvesson, 2003; Zietsma & Lawrence, 2010) with habitual and projective agency. This analytical exercise enables the capturing of actions oriented to the creation of qualitatively new solutions (following a new logic) from actions oriented at proposing 'the same but in a new wrapping' (following the old logic) (Table 7.1).

Table 7.1 Institutional work around logic shifts

	Habitual agency	Projective agency
Identity work	Developing and legitimizing new identities within the framework of the *old* logic	Striving to develop and legitimize new roles and identities within the framework of the *new* logic
Practice work	Developing and legitimizing new practices within the framework of the *old* logic	Striving to develop and legitimize new practices within the framework of the *new* logic

Source Strumińska-Kutra, 2018

Empirical Illustrations

We analyse leaders who faced isomorphic pressures for implementing participatory governance patterns. The pressures were accelerated by public disputes/conflict over policy priorities and standards. The first dispute concerned the closing of a school in a small rural community. The solution was to be formulated and the decision taken at the lowest level of public administration, which is the municipality. The mayor of the municipality enacted new regulations within the market and hierarchical narratives. Similar patterns of institutional inertia manifested in the case of a dispute over the construction of a flood prevention facility. Here, the director of an agency was responsible for organising public participation frames according to a hierarchical logic in which experts and bureaucrats were those who had the knowledge and made the decisions, while the public was the one who needed to be educated.

The two remaining disputes—over the location of a marketplace and of a wastewater treatment plant—took place in the same large city and the responsibility for planning and decision-making was split between the municipality and the province level. Two province-level leaders occupying the vice president position played a major role in the dispute over the marketplace. First, the vice president 'faked' participation to restore legitimacy and control—he ceremonially praised it without creating organisational structures to make it realistic. The second vice president (successor to the first) engaged in participatory practices and building narratives praising and justifying direct democracy and collaborative decision-making.

The analysis of dispute around the wastewater treatment plant brought the director of the Social Communication Department at the city administration to the forefront. He exploited opportunities created by external pressures in order to build organisational structures that facilitated access to public information, public participation and conflict mediation.[4]

The Mole: critical reflection on one's own specialism involves the ability to question one's own normative and cognitive patterns that guide thinking and acting on a problem. This ability is necessary to create

[4]For an extensive exploration of the cases, see Struminska-Kutra (2018).

structures that go beyond static, routine-based adaptations. Without it, leaders continue business as usual by reinterpreting new expectations within routinised frames, not noticing new angles to the situation. For two of the leaders investigated in this analysis, the major obstacle in creating and practising new rules was that the new logic contradicted their belief system, particularly their convictions about professional identities and practices.

The mayor responsible for the decision regarding the closed school had no doubts about the roles of the parties involved in the dispute. She reconstructed them according to well-established institutional logics: citizens and non-public organisations are those who listen and vote or possibly deliver feedback regarding satisfaction with government decisions and services. When, at a council meeting, she was pressured for a public discussion on possible solutions to the school problem, she stated:

> …once the resolution (about what to do) is adopted, I can officially consult people. I do not know what the Council's decision will be and I do not know what to ask the community. By reaching out to the community (after the resolution), we will know their opinion (…) We need to take a decision. I think this procedure is consistent with the letter of the law.

Identity work reinforces the work directed at developing and legitimising new practices, again within an old, habitual frame. Since the mayor could not imagine citizens contributing to the development of ideas, she advanced the solution herself, arguing for the need to vote over the proposed solution at council meetings. Having a resolution accepted by the council, she considered it ready for public consideration. The particular perception of the role played by citizens and officials also contributed to the creation of a bulletin that was to educate citizens on how public management processes work and why certain decisions, even if unpopular, need to be made. The same logic is visible in the eventually institutionalised practice of consulting citizens in quasi-surveys, asking whether they would accept or reject solutions developed by officials and councillors.

A similar mechanism of mutual reinforcement of practice and identity work was observed in the case of flood prevention facilities, where

the perception of identities influenced practice work. The public agency director responsible for public consultation saw experts and officials as the owners of a superior knowledge. Thus, for him public consultations were about providing local communities with technical knowledge, allowing them to understand that the proposed solution was suitable: 'We have done it as usual: calmly, argumentatively, providing technical and professional information (…) We wanted to explain that we were doing the right thing' (interview, October 2013).

Importantly, each of the two leaders was motivated by a certain understanding of professional ethos, of doing what is right. They believed that their interpretation of participatory approaches was valuable.

The 'ostrich' responds to pressures for change by creating the appearance of compliance. This strategy was adopted by the city vice president, who was involved in the dispute over closing a local market. City authorities made the decision about the closure in order to use the area for building blocks of flats. The decision was made without consulting the local community, and it broke previous agreements with municipal authorities and merchants. When faced with protests, the vice president engaged in institutional work by developing ad hoc participatory practices. First, city authorities invited local community members to select among the projects of blocks. Since the project was the very reason for the protests, this did not calm the public. Then, two public meetings were organised. During the first meeting, the vice president and officials heard the opinions of the local community; during the second, held a year later, they presented a project modified in accordance with some of the requests. Protests escalated, and yet city authorities did not act on the problem for another two years. In the meantime, the vice president officially declared the authorities were going through 'the process of learning' to deal with public participation. Two years later, the vice president was approached by a group of researchers and urban activists, who proposed a mediation of the conflict. He agreed and appointed a representative for the city in the mediation process. Importantly, he neither equipped this person with special prerogatives nor gave his own active support. Mediation failed, and in the report announcing a closure, mediators explained:

> Despite detailed explanations of mediation principles and goals, Director X [appointed by the vice president] stated that she could not act as an actual representative of the city in the mediation process and that the procedure described by mediators was not defined in regulations governing the work of city authorities (…) A serious obstacle in the process of disseminating dialogue and consultation is the lack of unambiguous legal and procedural regulations which would justify and explain to citizens their access to civic dialogue.

The institutional work of the leader was not directed at re-defining the role of public administration during collaborative processes. It was instead focused on faking participatory approaches in order to restore legitimacy and keep control over decision-making, thereby avoiding critical decisions that could change how the organisation operated. His strategy was to wait out the conflict. The vice president did not risk any significant losses in terms of legitimacy, instead deciding to abstain from action. Merchants and local community representatives were just one of many groups involved in the many decision-making processes he had supervised over the years. Faking change was just enough to survive and remain in power.

Foxes: leaders who adopt the strategy of 'foxes' avoid confrontation with old structures by offering space where new practices can be implemented along with old practices, as well as a narrative of how new and old identities can be complementary and valuable at the same time. This approach was adopted by the Director of Social Communication Department (SCD), a unit created during a conflict over a wastewater treatment plant. Interestingly, this leader used the opportunity not to solve the conflict but to institutionalise the collaborative identities and practices in city administration structures. He skilfully built up the new departmental identity as being complementary to established identities. The following narrative from an interview illustrates the tactic:

> They [officials from different departments] come to us when they face a conflict, because they are *afraid* and do not know how to deal with it (…) We need to combine the knowledge of experts representing different parties: those who use the city, those who manage it (officials), and experts in a given domain (for example, architects). Each of them

> thinks she knows best, but they know different things. Officials have a vast knowledge of procedures, they know what is allowed, and happens elsewhere. The experts know what can be done from the technical point of view. Citizens know, because they use the city every day. We facilitate the coordination of these perspectives; we make them respect each other to see the complementarity of their knowledge.

By building this integrative identity, he reduced internal tensions between the original organisational identity and new practices associated with the new logic (Svenningsson & Alvesson, 2003). He effectively used social skills (Fligstein & McAdam, 2012) to build social relationships, helping the organisation to cope with uncertainty and anxiety from the inevitable effects of institutional pluralism (Kraatz & Block, 2017). Additionally, he combined the support of external environments, promoting participation with the internal support of the city president, who commissioned the creation of the department yet did not equipped it with financial resources. By actively reaching out to the external environment, he attracted professionals skilled in organising participation and financing from European Economic Area grants. He organised experimental public consultation processes in all municipalities of the city. Thus, he created opportunities for practice work, which is institutional work focused on establishing new patterns of action. He personally negotiated the financial and structural conditions of projects' implementation, which eventually resulted in setting up positions of public consultation officials in each municipality. In the following years, the director and his employees either established or supported the creation of new organisational structures, enabling public participatory action. Among others, there was the Public Consultation Platform, a register of all past and current consultation processes, and a city-level regulation defining public consultation and making it compulsory to announce each consultation process held by the city administration authorities on the Public Consultation Platform.

Lions: the goal of 'lions' is to secure the survival of innovations and to prevent them from drift or co-optation. They protect new, vulnerable

structures from being taken over by opportunistic interest or reinterpretation that is inconsistent with the original 'spirit'. Hence, their strategies are more confrontational and may involve the deinstitutionalisation of organisational structures, contradicting new mission. The second vice president, also involved in the dispute over the marketplace, offers an example of this confrontational type. He entered the scene when the failing experiment with mediation was still ongoing. He refused, however, to follow in the former vice president's footsteps, instead taking back control of the process. He constructed a new, temporary structure, a working group, on the interface of city administration, municipality administration and external stakeholders' organisations. He established communication channels between these stakeholders and personally coordinated the process of designing solutions for the market. Importantly, although the new vice president shared the ideological orientation of collaborative approaches to governance, at the time, he had no experience in governing multi-stakeholder processes. What made the new vice president prone to learning new governance modes was a strong conviction that involving external stakeholders was the right thing to do, as well as social skills (Fligstein & McAdam, 2012). The latter enabled him to create trust-based relationships with external constituents and organise collective action, combining actors from different levels and 'siloes' of public administration and external stakeholders.

Having a formal position of power, the new vice president was able to design new practices and make his subordinates follow them, even if it meant going against institutionalised methods and officials' convictions about their roles. Within new processes, the role of the members of the administration was to discuss different solutions with the community and merchants' representatives and to provide information about any procedural and material aspects of the situation. Importantly, employees trying to work according to the new collaborative logic received substantial support and could further learn and improve their practice. In this particular case, these were street-level bureaucrats, directly responsible for managing the market area, who were in touch with merchants on a daily basis.

Along with introducing new practices, the new vice president performed institutional work by building narratives that justified new practices and identities and built organisational integrity around them. The most prominent example was the 'there-is-no-alternative' narrative about replacing the hierarchical approach to public management with a participatory approach. First, he claimed that such a replacement was a reality and second, a historical necessity, a sign that a public management structure was becoming 'civilised' (an original expression used by the vice president). When describing the hierarchical approach, he directly questioned the assumption of representative democracy in which citizens delegate power to politicians who then solve public problems through public administration. He framed this approach as obsolete and old-fashioned.

> In 2006, you would hear such opinions everywhere. They would argue in favour of the iron rule of representative democracy and ask: if we should have direct participation and consultation, what are the councillors for? I hear such voices now, but no one dares say it out loud.

The major line of his argument was very different from the one used by the director of the SCD. Both believed in participatory approaches and promoted them, but the SCD director worked with a more inclusive, conciliatory strategy.

Conclusions

Institutions are broadly understood as 'the rules of the game' that direct and circumscribe organisational behaviour (Kraatz & Block, 2017). Public agencies facing the three paradigms play in three games simultaneously. Historically speaking, they were made to play according to a hierarchical logic. Then, in the 1980s, institutional pressures for the adoption of market logic emerged. In the 1990s came the next shift, this time towards network-based, collaborative approaches to governance. Each of the logic sediments in organisational structures influences the way new organisational practices and identities are perceived (van de Bovenkamp,

Stoopendaal, & Bal, 2017). Whenever projective agency is used to create innovative solutions according to a new logic, there is a risk that old, deeper-rooted logic prevails, and what was supposed to be qualitatively different turns out to be an old thing in a new wrapping. Hence, the four challenges that institutional pluralism poses for an institutional leader in public administration are the challenges of maintaining and (re)creating structures that are characteristic of each paradigm; creating meta-level integrating values; deinstitutionalising some of the original structures; and transcending their own institutional embeddedness.

Our typology illustrates the responses to these challenges by tracing how leaders build organisational institutions that embody new goals and values while keeping organisational integrity. First, 'moles' and 'ostriches', use routinised patterns of thinking and acting (habitual agency) when creating new structures for collaboration. Yet, only the second can be accused of opportunism: the pursuit of immediate, short-term political advantages (Selznick, 1957, p. 143). The 'ostrich' performs institutional work that is strategically focused on creating the appearance of compliance. Since he/she is faking change in response to pressures, her/his orientation is towards external not internal publics. The institutional work she performs addresses practices (visible from the outside) not identity work. 'Ostriches' only address the first challenge of structure creation, though in a selective and opportunistic way. The 'moles' are not opportunistic because, despite their habitual orientation, their work is values-based. She develops and legitimises new practices and identities within the old logic because that is the only logic she knows and believes in. This is also how she answers the challenge of integration, through the act of translation from new to old. She neutralises the tensions between logics by re-establishing old order.

'Foxes' and 'lions' use projective agency; infusing new forms and contents into organisational practices and identities. 'Foxes' build a structure while keeping the diverse paradigms in a creative tension and build an integrating narrative of complementarity and dialogue. For 'foxes', organisational integrity means *wholeness* rather than consistency, building structures that transcend but do not eliminate paradigmatic divisions (Besharov & Khurana, 2015). In contrast, 'lions' aim for consistency. They use a confrontational strategy, which comes with the danger of

organisational integration manifesting through the colonisation of the old paradigms by the new. Interestingly, this same danger is caused by the strategy of a 'mole', although projective agency provides the colonisation act with future-oriented not past-oriented content.

Only 'foxes' and 'lions' engage with the third challenge of deinstitutionalising some of the organisational patterns of thinking and acting. The strategy of the 'lion' evolves through confrontation. This poses the risk of subordinating one logic to the other and, hence, it is less fitting in the situation of institutional pluralism.

The fourth challenge of transcending one's own cognitive and normative embeddedness is indirectly addressed by the 'fox'. A 'fox' works at the interface of different logics by advancing a meta-level value of dialogue. By being exposed to various interpretations of the same values,[5] she is more prone to engage in critical reflection upon her own understandings and actions. Moreover, by creating the structures for communication between perspectives, she builds a reflexive capacity into the organisation. In this sense, she provides an institutional leadership model that fits institutional pluralism best. It is also a model that best exploits conditions of pluralism to create opportunities for evolutionary for public good (Ansell, 2011).

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[5]For reflection about ambiguity of values, see Askeland, de Silva in this volume.

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8

Institutional Leadership: Maintaining and Developing the 'Good' Organisation

Harald Askeland

Introduction

Drawing on data from a case study in a faith-based health organisation (FBO), this chapter addresses how leaders work intentionally with values through forms of work. Such values work sheds light on critical functions of institutional leadership, namely the 'infusion of values', as coined by Selznick. Addressing the renewed interest in institutional leadership (Kraatz, 2009; Kraatz & Flores, 2015; Raffaelli & Glynn, 2015), the chapter utilises Selznick's identification of basic functions of institutional leadership (Selznick, 1957/1984, pp. 62–63) and elaborates how values work relates to mission, character and the embodiment of values in organisations. The discussion explores how leaders, through ongoing efforts and the recurring facilitation of processes, relate mission, values and character of the organisation.

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This chapter argues that values work enacts such value infusion. Selznick (1957/1984), unlike the more rational organisational contributions, emphasises that organisations consist of individuals and constitute a vibrant social scene. Institutionalisation intertwines with the organisation's development over time, shaping a distinctive history. In this process, leaders exert agency that is underexplored in institutional and values work research.

Institutional leadership concerns establishing and protecting institutional values and character. Its orientation is argued to be more towards self-maintenance and less leaning towards a future or change orientation (Washington, Boal, & Davis, 2008). Selznick, on the contrary, ends his essay by underscoring how institutional leadership requires strategies of change that realise the needs and aspirations of the organisation (Selznick, 1957/1984, p. 154). Some contributions actually address how leaders contribute to either institutional creation (Struminska-Kutra, 2018), maintenance through adaption (Askeland, 2014), change (Kraatz & Moore, 2002) or the fundamental practices of institutional leadership (Beaton, 2017). Leadership is important in understanding how values work contributes to development, extending the traditional conception of institutional leadership. Golant and colleagues show how managers contribute to a temporal consistency by contextualising inherited value commitments through identity work (Golant, Sillince, Harvey, & Maclean, 2015). Consistent with the intention of this book, and responding to the call to supplement research in institutional work (Hampel, Lawrence, & Tracey, 2015), this chapter addresses the *who* and *how* by exploring the work of leaders as intentional efforts of infusing values.

Institutional theory often represents a macro- perspective (DiMaggio & Powell, 1991; Meyer & Rowan, 1991). Yet, there was a parallel interest in the agentic and creative ways in which organisations and leaders inculcate and reflect their institutional pluralistic contexts (Suddaby, 2010). Organisations facing pluralistic institutional contexts constitute salient cases to study institutional leadership, responding to changing and/or contradicting external and internal audiences.

FBOs originated primarily to give expression to the social, moral and/or religious values of their founders and supporters (Jeavons, 1992).

They developed into voluntary or professional organisations, with self-imposed identities and missions derived from religious traditions and acting independently to promote the realisation of *the common good* (Askeland, 2011). Historically, religious organisations and FBOs played an influential role as carriers of values associated with the common good (Lorentzen, 1998; O'Neill, 1992), such as welfare provision, tending to the needs of the community and caring for the sick and needy (Fokas, 2011). FBOs in Scandinavia operate autonomously in relation to both religious communities and public agencies. Within a context of institutional pluralism (Kraatz & Block, 2017), FBOs are constituted and operating on the boundaries of differing fields. This encourages continuous work on mission, values and character (Kraatz, 2009), making leaders positioned to influence organisational evolution and character.

Empirical research illustrates the theoretical considerations of this chapter, by utilising publications from prior case studies at the Røysumtunet Foundation. Firstly, the chapter contributes to previous research by integrating values work with the concept of institutional leadership. Secondly, it offers an agentic process perspective, analysing how leaders contribute to institutionalising the mission, values and character through ongoing and recurring organisational processes.

Relating Values Work and Institutional Leadership

Selznick was interested in how organisations evolved into institutions by developing a distinct character and labelled the work of leaders to infuse them with values as institutional leadership (Selznick, 1957). Claiming that ideational, change and agentic aspects were lacking in research, authors voiced the need for understanding institutional change as related to intentional, resourceful and strategic efforts. Coined as institutional work (Lawrence & Suddaby, 2006), it pointed at the possibility to establish 'a broader vision of agency in relationship to institutions' (Suddaby, 2010, p. 16). This emphasis sparked interest in different kinds of such work (Phillips & Lawrence, 2012; Suddaby & Foster, 2014). Of particular interest for this chapter is values work (Aadland et al., 2006;

Askeland, 2014; Gehman, Trevino, & Garud, 2013; Vaccaro & Palazzo, 2015).[1] Leaders perform values work as they become involved in the reflexive and skilful articulating and promoting of values and meaning in organisations, performing a particular set of actions to enhance ongoing knowledge and processes producing value-related practices in specific situations.

Of particular interest in this institutional context is the question of how 'good organisation' and 'good ends' are constructed. The case organisation represents an interesting example, operating within the frame of a Norwegian public welfare and health policy regime. The issue of fulfilling their faith-based mission within a secular society and adjusting to dynamic changes regarding legal, political and professional logics challenges them. Documented strategies are value overlap, integrating different logics into a new conception of values and character or seeing values as vessels of implicit religious meaning (Askeland et al., 2019; Eurich, 2012; Repstad, 2001).

Due to their responsibilities, vested with authority to initiate and shape direction, leaders function as key actors. The study of Gehman et al. demonstrated that values work could occur without executive managers being involved but encouraged studying top executives and their role in such work. Askeland and Beaton argue that aspects of this are evident across managerial levels even though they are clearest in the work and self-perception of top-level executives (Askeland, 2015; Beaton, 2017). Prior Scandinavian research demonstrates how values work is not solely linked to organisational governance or top-down implementation, underscoring collective and dialogical aspects of values work even while being initiated or facilitated by managers (Aadland, 2010; Aadland et al., 2006; Brytting & Trollestad, 2000; Petersen, 2003). Previous contributions to values work by leaders look at processes or phases in an organisation's life (Maierhofer, Rafferty, & Kabanoff, 2003), offering insight into processes and mechanisms that contribute to value formation and application in practice.

[1] See also the chapter on values work by Espedal in this book for a more thorough discussion on values work.

A temporal and processual perspective enhances understanding on the inner life and dynamics of processes, where actors act intentionally and knowledgeably, simultaneously embedded in and responding to specific institutional contexts. Existing studies document that these processes manifest themselves through different groups voicing and acting on concerns or matters (Gehman et al., 2013; Vaccaro & Palazzo, 2015). Understanding values work as temporally embedded practice, Gehman and colleagues found the following four key processes: emerging concerns, knotting into action networks, performing practice and circulating discourses (Gehman et al., 2013, p. 102). Alternatively, Askeland identified the following four phases of values work: initiating, activating, articulating and maintaining across different levels of practice (Askeland, 2017, p. 176).

Research Setting

The case organisation is a diaconal institution, a kind of organisation established from the second half of the nineteenth century shaped by the moral and faith-based convictions of religious groups within a North-European Lutheran context (Angell, 2001), conceived as expressions of the health and social services of the Lutheran church. Over time, diaconal institutions developed into highly professional organisations. They operated in close collaboration with, and mostly funded by, public welfare agencies (Leis-Peters, 2014a, 2014b). Due to this institutional pluralism, they are subject to differing regimes by their constitution, embedded within multiple normative orders and possess multiple identities derived from segments of the plural environment (Kraatz & Block, 2017). Such embeddedness plays out differently related to national context (Göçmen, 2013), depending on institutional changes in religion and the role of the voluntary sector. The particular welfare and health policies and established relations to public agencies thus raise particular issues to consider.

Data were gathered at the Diaconal Foundation Røysum, an independent foundation, defining itself as a diaconal institution. The institution operates on contract with either state-owned health enterprises in the

rehabilitation of epileptics or local municipal agencies offering long-term care for epileptics as well as psychiatric patients.

Data from a combination of methods, such as participant observational field-notes, interview transcripts and policy documents form the material for research utilised in this chapter. In doing so, this chapter aligns with a need to get to the 'institutional stories', construction of meaning systems and frames for action rather than counting institutionalised forms (Suddaby, 2010, p. 16). Interviews gave important data on assessments of actions and their relation to mission, character and values. Policy documents of the organisation provided the same as they aim at articulating the missions and espoused values defining the organisation and represent data on the aspirations and efforts of the board and managers. Process data come from two cycles of organisational values work. The first process took place in 2006–2007, gathering archival data as reflected in policy documents and interviews and a previous report from the case study organisation (Sanna, 2008). A new cycle of values work, in which I had an opportunity to be a participating observer, started in the summer of 2016 and concluded in autumn of 2017, with my own summarising of Cycle II.[2]

Mission, Character and the Embodiment of Values

Analysing data, leaders' efforts to maintain and develop the good organisation evolve through three thematic frames: conceiving of the good home, participating in the enhancement of the common good and establishing a shared, embodied understanding of good practices.

[2]This summary is not published but issued as a report to the Board of the Røysumtunet Foundation in November 2017.

Conceiving of the Good Home: Continuity and Development in Institutionalising the Mission

Temporality was important, as the leaders emphasised connecting to the founding era (Suddaby & Foster, 2014) in order to contextualise values work. The Norwegian Association of Deacons established Røysumtunet in 1965 as an institution of residence and care for epileptics, giving direction for institutional development according to the basic mission and values shaping its identity. Such conceptions require legitimation, and following a diaconal tradition, a central part of organisational identity formation was related to the concept of 'a good home' (Røysumtunet, 2015, p. 14) for groups without sufficient care. The organisational character captured an orientation towards 'good professional practice' in caring and enhancing 'a good life' for vulnerable groups.

Underpinning the values driving the establishment of Røysumtunet was the idea of doing *good* through the religiously inspired conception of Christian compassion (diaconia). In the original bylaws, mission and identity closely related to the Christian faith and tradition, building professionalism for long-term residence and care. The first CEO, Arne, framed the mission as being 'based on Christian values' and cited the original bylaws stating care to be 'a service in the Spirit of Christ'. Erik, the second and still acting CEO, expressed that institutional practice is an intentional enactment of 'Christian motivated compassion' and the institution to be 'part of the diaconal ministry of the Church'. While the early period marked a direct and articulated link to faith and morality, the last 20 years represents a broader orientation imbuing values-expressions with both faith-based and universal formulations.

As establishing institutions requires funding, the founders worked the ground for approval by forming networks and alliances with medical authorities and public agencies (Røysumtunet, 2015). The founders had a pragmatic view on this issue, collaborating with public agencies provided allies for performing the common good but also meant possibilities for funding (Tønnessen, 2005). Both CEOs underscored a non-conflictual relationship to public agencies.

Symbolic acts conveying religious meaning marked the opening of the institution as the prior farm buildings underwent a ritual of consecration in the presence of representatives of public agencies and local civic organisations. Throughout its history, residents had lived their lives and interacted closely with communal life in the local community. These historical lines established a basic understanding of mission, character and values maintained and adjusted through ongoing work and recurring cycles of values work. Publishing 30- and 50-year anniversary booklets, the CEOs edited one each, were deliberate efforts to narrate and connect the contemporary mission and character with the founding period of the organisation.

The first CEO stayed at his post for 30 years, contributing to basic shaping of mission and identity. The second CEO took on the task of renewing and broadening the organisation's scope and services, adding psychiatric care to the original care for epileptics. He articulated it thusly: 'Most of our residents consider Røysumtunet as their home, and this goes whether they stay for one or twenty years. Accordingly, we provide services aimed at living a full life; it's not just about care but concerns social life, leisure and even spiritual nurturing of differing faiths'.

The strategic plans of the period display a balancing of history and contemporary strategic opportunities, defining future mission, objectives and profile. Characteristic of the plans is a professional strategic assessment of the current reforms of health care in Norway as well as relations to external institutions and cooperative partners. Emphasis is put on the issue of economic growth as fundamental for a secure economy. They also display work of developing a profile and values during the period to be strategic. Both value process cycles of 2006–2007 and 2016–2017 contributed to developing the institution's profile. Values were articulated in a more general, humanistic way, underscoring confident, joyful and mature residents met by professionalised care. The basic mission was articulated implicitly but was still to 'conform to the institution's understanding of its diaconal mission, which is to help people in difficult situations, based on Christian compassion'.

Framing the mission of the organisation within the Christian faith tradition shows agency by the board and the CEO. Although operating under premises set by public welfare and health policies, and

being involved in promoting care and health as the common good, they labelled arguments for operating in this sector as diaconal. At the same time, in daily operations an equally important factor for the institution and the interviewees was to appear as a professionally strong institution with a particular focus on bringing confidence and quality of life to weak patient groups through holistic services (Sanna, 2008, p. 9). After the second cycle, the annual report for 2017 summarised the process by linking these dual rationalities:

> Our vision of generosity and competence signals that 'our diaconal profile is all about fraternal love and enhancing compassion' and at the same time 'it also expresses an expectation and commitment to performing competent professional health care'.

The CEO displayed the most evident commitment to the expressed values and initiated the process but worked closely with the executive group. The other managers were familiar with and identified with the values. First-line leaders stated commitment to basic values, emphasising their indirect effect on practice without articulating them as explicitly religious. Through critical decisions, both by the initiation and later expansion of organisational services, intentional efforts to define the mission and role of the organisation were evident—upholding the notion of the 'good home' through continuously narrating and adapting its framing within the given faith tradition.

Leaders' Contribution to Institutionalising 'the Common Good': Value Processes as Conveying of Character and the Role of the Organisation

The institution underwent a first cycle of values work in 2006–2007 and engaged in a new cycle in 2016–2017. Both cycles and processes, initiated by the Board and the CEO, partly confirmed and partly reformulated the existing mission and values statements (Askeland, 2014; Sanna, 2008). Choosing an inclusive design, all employees were invited and

expected to participate. The CEO chose a strategy, combining a representative project group preparing and summarising two plenary sessions while 16 smaller groups discussed and prepared plenary input.

At the outset of cycle two of values work in 2016, questions arose as to how open the process could be. The CEO acknowledged an open discussion to take place, underscoring this to be a deliberate choice by the board. He nevertheless signalled some limits regarding upholding the faith-based identity and mission in particular and not substituting all core values. The chair of the board together with the CEO gave introductions at plenary sessions, emphasising the importance of the services offered and their grounding in values and institutional history.

This paved the way for differing views, highlighting professional and humanistic aspects of organisational practice. This duality was evident in the values work process (2016–2017), both in the main project group and in working groups when presenting their discussions at two plenary sessions. Expressions of values had two main focal points—they were resident-oriented and important for performing daily professional practice. Also expressed, although less prominently, was the diaconal faith-base of the institution that showed legitimacy and accept among the staff.

Already evident from the first cycle in 2006–2007, much of the aspirations regarding the common good that the organisation enhanced were articulated and aligned with public health policy documents and humanistic values (Sanna, 2008). Still, leaders viewed the character and mission of the organisation in the context of religious tradition but more as inspiration and argument for the continuing presence of the institution (Askeland, 2014, p. 160). The second cycle (2016–2017) confirmed this profile but combined narrating the historical character with renewed and adjusted articulation of mission and values statements.

The new values chosen, reflected a profile that is distinct compared to reports on values of business enterprises but also public organisations (Falkenberg, 2006; Jørgensen, Vrangbæk, & Sørensen, 2009; Wæraas, 2018). While Falkenberg's study of values in Norwegian enterprises discovered several rationalities or logics, such as economic, moral, relational and professional values, economic values lacked among the values of Røysumtunet. Their values related to moral and professional practice and focused markedly on residents.

Røysumtunet is a health institution, operating as a service provider for public health agencies, characterised by public health and professional values and governed by health care legislation. The legal regulation of habilitation and rehabilitation stated general values and objectives concerning rights to and quality of services received. The choice of a new mission statement and values aligned closely with such publicly stated norms and standards. Røysumtunet chose values that 'correspond' with their own identity (Wæraas, 2010), while institutional health-sector values were incorporated, with assumed significance for legitimacy by possible components being given a situational- and institutional-specific composition. This way, choice was guided by those values which matter in the context at hand (Selznick, 1996, p. 271). Given that the organisation under study already had established identities, it seems probable that such organisational identity governed the choices of contextually available values and norms while keeping close to their own understanding of what common good to realise.

Although the mission and values statements did not use specific faith-based language, their formulations were framed by an understanding of diaconia as an expression of faith. Policy texts emanating from the values work cycles, including annual reports, strategic plans and internal procedures and codes of conduct, elaborated how chosen mission and values statements related to institutional character. This represents a continuous balancing of a dually constituted character by profiling distinction by translating common values while framing them in relation to institutional history.

Conceiving of and Performing 'Good Practice': Embodying Values in Organisational Structure and Practice

In accounts of the founding of Røysumtunet, faith was more explicitly said to embody practice. Nevertheless, professional care and the enhancement of a good life seemed to be the primary aspirations of daily work and a necessity for societal legitimacy, funding the expansion of services. In establishing Røysumtunet, the faith-oriented founders allied

with external stakeholders' expertise to secure legitimacy and sanctioning from public agencies. This mix of logics constituted and continued to characterise Røysumtunet.

The embodiment of values, firstly, had a symbolic and meaning-bearing dimension. The old farm storehouse was converted into and consecrated as a chapel in 1980. Monthly sermons together with a weekly devotion, held in a common living room, gave residents an opportunity to nurture their spiritual life. Symbolically, leaders and other members of staff throughout these 50 years voluntarily offered these devotions, combining their professional and managerial roles with those of being carriers of the faith tradition.

In preparation of the plenary sessions, all employees were invited to discuss working experiences related to existing values. These discussions let staff assess the experienced relevance and strengths of values, evaluating whether they were portraying or aligning with the diaconal heritage. The content of the group discussions was presented and discussed at the session, led by a department manager and later summarised by the project group. The project group drafted new issues to be prepared for the next session, inviting the groups to suggest new values and a new mission statement of the institution. Arguing and grounding accompanied the groups' suggestions for new values, followed by a plenary discussion. The project group summarised input for mission statements and values, discussing and negotiating suggested formulations. The CEO led the project group, keeping a low profile in the initial phase but became more actively involved in the concluding phase—not so much on the values statements but more active regarding mission statement and upholding the faith-based framing of interpreting the statements. Such agency involved heading a smaller group to edit and articulate a final suggestion of text.

When asked why the new cycle was initiated, the CEO stated: 'We did it very much to energize our attention to and enhance reflection on values. Therefore, we gave much leeway for the staff to influence the choice of values, whether we have respect or equality as core values does not change much. What is a change was the process in itself; we now have a more vigorous internal values discourse than ever before'.

Following each cycle of values work, as part of ongoing managerial leadership work, the formulation of organisational values led to articulating a platform of leadership philosophy and a parallel code of conduct for employees. This represents a structural effort of institutionalising practices. Developed in the executive group of leaders, it was an explication of how the values should inform practice. It covered areas such as human resource management, administration, financial management and professional practice. The primary focus of the leadership philosophy concerned an internal orientation for leading employees. Along these guiding principles, the implementation of values practices was combined with ongoing reflection on professional practice. Emphasised in plenary sessions and in conversations with staff and first-level managers, ongoing supervision and reflection-groups put the values and ethical dilemmas on the agenda on a continuous basis.

This mix is seen across differing sources of data. Though the institution has a self-imposed basis in the diaconal tradition informing defined values, leaders need to maintain a broad set of goals and values. Such a broader set of values relates to professional standards and quality, economic sustainability and the efficient use of resources in addition to relationships with official cooperative partners concerning reporting and legitimacy (Askeland, 2014, p. 168). In addition, Sanna (2008) claimed that the ongoing values work of the institution had a significant effect in daily life. Her study showed the integration of values in the daily work of the staff. Even though the staff did not express values as a conscious governing tool in daily life, they were reflected when it came to interaction with residents and cooperative partners (Sanna, 2008, p. 52).

Concluding Remarks

This chapter demonstrates how leaders contribute to the interpretation of organisational mission, shaping of character and embodiment of values in both structural guidelines and interpreting practice. Through values work, leaders address the issue of a 'good' organisation by attempting to bridge past and present mission, maintaining a sense of institutional

character and framing and legitimising their contribution for the residents and the community. This work is performed through activities ranging from faith-based practices, such as offering religious devotions and sermons, publications celebrating anniversaries narrating the history of the organisation and dialogical interaction through organisational value projects and maintaining and embedding values in procedures and daily practices. This holds true across levels, yet contribution differs with regard to level of the leaders. The CEO had a special role, authorised by the board, in articulating values and mission statements. The creation of a temporally consistent institutional narrative, through both ongoing efforts and recurring cycles of processes, is constituting a link between the creating- and disrupting/change-processes of institutional work.

Central to these efforts are choosing and articulating values, which function as 'stepping stones' that translate between the faith tradition and public welfare and professional values. The values, chosen among sector-based values, aimed at enhancing explication and arguments that integrate a faith-based profile and value-base with those sanctioned by public policy and professionalism. These values framed the more concrete professional and administrative practices that were the responsibility of mid-level and first-line leaders. These did not express much conflict between the different sets of values but rather integrated their professional leadership by loyalty to these more overarching values.

In addition, organising and facilitating a broad and inclusive process of values work contributed to engaged consciousness of the staff. The voicing of concerns at plenary sessions, regarding choice of core values, was acknowledged by the main project group, the executives and by the board. This found its way into the annual report of 2017, arguing for the change of core values from respect to equality: 'The value of equality substitutes respect, as the employee group considers this as a more applicable term, while the values of safety and coping are kept as they are prerequisite for a good life'.

I interpret these efforts as purposive acts aiming at infusing values and creating frames for action. While earlier studies report the prior values as ambiguous for groups among employees (Askeland, 2014; Sanna, 2008), the second cycle seemed to ground the new values as they align with concerns voiced throughout the groups and in the plenary work. Choosing

to facilitate a broad process, and yet setting some ramifications for change and directing the internal discussion, strengthened the internal acceptance of a diaconal heritage while focusing attention on including spiritual needs of the residents in general. This diversity was partly bridged by choosing and framing public values within the diaconal heritage but also by allowing involvement that fostered engagement, values consciousness and reflective capacity.

Through facilitating and managing processual work, their efforts relate to embedded agency. The established mission, character and values of the organisation is a frame for managerial work but also a matter of maintenance and even re-shaping by the interpretations and evolving practice of leaders interacting with internal and external actors and stakeholders. The re-shaping aspect has received little attention, although Selznick argued that true commitments needed continuous reassessment (Selznick, 1957/1984, p. 73). Selznick saw this as a combination of internal competencies and aspirations and external demands or pressures. This chapter suggests institutional pluralism spurs recurring efforts to bridge internal and external tensions, recreating a new articulation of mission, character and values.

I interpret this contribution as efforts of institutional leadership, as coined in previous work (Kraatz, 2009; Kraatz & Flores, 2015; Raffaelli & Glynn, 2015; Selznick, 1957; Tengblad, 2006), confirming the importance of values in communicating institutional character and understanding mission (Wæraas, 2010). Such purposive efforts are related to multiple internal and external value-sources and rationalities and work through conceiving of the 'good' organisation, partaking in the public policies for the common 'good' and performing 'good' professional practices through activities articulating shared social meaning and framing interpretation through symbolic practices.

Institutional leadership exerts values-infusion by creating narratives linking past, present and future, translating external values-expectations by aligning and framing them with existing organisational identity, and securing their embodiment by facilitating processes of explorative values

discourse. Utilising the ambiguity of values enhances shared yet individual interpretation of values, bridging the interests of differing stakeholder groups.

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9

Women's Path to Leadership Through Values Work in a Context of Conflict and Violence

Ellen Vea Rosnes, Terese Bue Kessel and Jolly Namwesi Kanywenge

Introduction

Women across the globe experience the path to leadership differently. In African contexts, female leadership has a strong legacy (Skaine, 2010). Queen mothers have held positions of power across the continent, and ancient Egypt had women pharaohs (Skaine, 2010, p. 345). The tradition of women leaders can be seen to this day, with several freely elected female head of states. Women also serve as leaders of traditional African religions (Odamtten, 2012). In mainline and African-founded churches, women occupy various leadership positions, especially at a congregational level (Ngunjiri & Christo-Baker, 2012).

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However, from a broader perspective, female representation in leadership positions is much lower than that of males (Ngunjiri, 2010; Wakahiu & Salvaterra, 2012), and the situation reflects the global phenomenon of a 'glass ceiling' (Adams, 2007). That is, women's access to powerful positions is limited by 'social norms, organizational cultures, and structures' (Ngunjiri & Christo-Baker, 2012, p. 1). Madimbo highlights that the entire structure of religious organisations, including 'the wall, the roof', is embedded in a patriarchal culture and prevents women from reaching leadership positions (2012, p. 27).

Given the scarce scholarly publishing on women leaders in African contexts (Christo-Baker, Roberts, & Rogalin, 2012; Ngunjiri, 2010), we wish to understand what values, implicit or explicit, assist and impede grass-roots women on their path to leadership. We ask *how women compete and negotiate paths to leadership through values work in a context of conflict and violence*. Our work is based on qualitative research carried out in South Kivu, located in the Democratic Republic of Congo (DRC). Drawing on women leaders' narratives, we discuss how women engage in values work on their path to leadership positions through education, religious civil society organisations and the fight for women's rights.

By values, we refer to 'individual and collective conceptions of desirable trans-situational behaviours, objectives and ideals, serving to guide or valuate practice' (see introductory chapter). Espedal (see chapter on values work) defines values work as '…social and institutional processes of constructing agency, actions, and practice in organisations'. On the one hand, women face severe challenges in reaching a leadership position in an environment marked by patriarchal values, violence and conflict. On the other hand, contextual shifts (see introductory chapter) brought about by wars and conflicts sometimes offer new opportunities to engage in the society, which, for instance, result from an increased involvement of international development actors promoting women's rights.

In this book on values work, we appreciate the space for a contribution from the Global South. Studies on women and leadership in Africa over the last decades have highlighted relational skills, collaboration in the community and feminine conducts of care (Ngunjiri, 2010; Njoroge, 2005; Skaine, 2010). These characteristics are also reflected in our data

on how values work is negotiated at the grass-roots level between individual and collective desires. This work complies with the suggestion that more knowledge can be gained from how women, '*the who* of values work', describe their experiences on their way to influential positions (see introductory chapter).

A Context of Conflict and Violence

The data for this chapter were collected as part of a broader project on religious civil society networks in the Great Lakes region, who serve as partners in peacebuilding processes in conflict-prone areas (Jordhus-Lier, Rosnes, & Aasen, 2015). The project, funded by the Norwegian Ministry of Foreign Affairs, was carried out in collaboration between the Center for Intercultural Communication (SIK), the Norwegian Institute for Urban and Regional Research (NIBR), the Université Evangelique en Afrique (UEA) and the Université Officielle de Bukavu.

DRC has witnessed much violence and conflict in the last decades because of two devastating wars (1996–1997 and 1998–2003). The United Nations Security Council Resolution (UNSCR) 1325 on women, peace and security (United Nations, 2000) acknowledges the serious effects of conflicts on women. The resolution, articulating an internationally accepted value, reaffirms the need for women's equal participation in promoting peace and security. Women constitute a large proportion of the millions of conflict victims in DRC (Jordhus-Lier et al. 2015, pp. 42–44; Kimaathi & Waruhiu, 2009; Solhjell, 2009). In fact, one of the main reasons women is not actively engaged in peacebuilding and formal negotiations is that they are looked upon as caregivers and victims of war (Puechguirbal, 2004; Whitman, 2006). Ngongo (2009) noted that women in South Kivu are not passive but active sufferers of war. Their contributions are often seen in informal settings, such as in the local community, in the family and in the corridors of official negotiations. According to Ngongo, even though women act mostly on the periphery of formal structures, they manage to capture a space and exert influence as representatives of the civil society.

In a war and post-war context, the role of civil society organisations is crucial. Aembe and Jordhus-Lier (2017, p. 3) summarise it as follows: 'With formal statehood in crisis, Congolese churches and international development agencies are among the many civil society actors who perform state functions in its places, including the provision of social services and various public governance role'. It is against this backdrop that the women participating in this study narrated their experienced leadership journeys.

Women Leadership, Values and Values Work

Leadership studies mostly focus on power and control and apply theories developed in the West. The voices of the marginalised are seldom heard. Scholars such as Ngunjiri (2010) have argued for the inclusion of non-Western and non-White leadership studies into the Western hegemony. Ngunjiri shows how leadership evolves in various social, cultural and historical contexts by studying African women in Kenya and argues that context matters in the practice of leadership. She sees the meaning-making experiences of African women leaders as tempered by radicalism, servant leadership and spirituality: 'a context that has produced critical servant leaders who rock the boat without falling out, convicted and guided by their spiritual praxis' (Ngunjiri, 2010, p. xi).

Between community entrepreneurial leadership and institutional leadership and between compatible and competing values of gender, culture and religion, there is a need to understand the interaction of *the who* of values work. We will address the *who* of values work (see introductory chapter) using women's reflections of their paths to influential positions in interaction with local communities and institutions. We agree that values, implicit and explicit, are embedded in all kinds of practices and behaviours of life (Kluckhohn, 1951, p. 395). While explicit values are audible and can be articulated, implicit values are silent, embedded in practices, taken for granted and go under the radar of common conceptualisation. Similarly, trajectories of values are implicit within leadership practices in religious and civic institutions, and they are the driving force for when women who seek to influence. According to Kluckhohn

(1951), values play a role between individual understanding and collective considerations of what is desirable and what is good or bad practice. Others situate values as interaction between two sets of agents, such as Spates (1983) who sees the connection of individuals and collectives as essential to understanding how values work operates in organisational leadership. There will be either 'consensus or competing orientations among actors and interest groups' (see introductory chapter). The following discussion is on *how* consensus and competing values are manifested in women's paths to leadership through education, participation in religious civil society organisations and women's rights.

Discovering Paths to Leadership Through Narrative Life Stories

In 2011, a team of two co-authors (Rosnes from VID and Namwesi from UEA) collected 13 stories of women leaders in Bukavu, South Kivu. The UEA research team selected these participants on the basis of their influence in society. Four of the participants were leaders within religiously affiliated civil society organisations or churches; three within other organisations in civil society; three within media firms; and three within public political structures. The participants were between 30 and 60 years old and represented different social classes, education levels, religions and regions. A narrative life story approach was used to analyse how women leaders themselves explained their journeys to becoming leaders (Lieblich, Zilber, & Tuval-Mashiach, 2008). Participants spoke about their current situation in leadership positions and the story of how they came to occupy it, according to them. Most interviews lasted for more or less one hour were carried out in French, recorded and later transcribed. Excerpts included in this chapter have been translated into English by the authors. The women consented to participating in the project and did not want to stay anonymous in publications. Because they are used to public exposure, they wished to have their names attached to their experiences. They had the opportunity to read through the transcriptions and the first draft of the analysis. In the 13 life stories, there are

several examples of women's values work and how women challenge collective values on their path to leadership. We discuss two of these stores in detail below.

Basombana and Kusinza's stories have been chosen because they align with our focus on religious organisations. Both these women were interviewed when they were leaders of departments of women's affairs in different churches. Their stories illustrate how values work is at play in religious civil society organisations.

Basombana's Story

Basombana said she did not have a happy childhood. Her mother was only 15 years old when she married her father—a man who was twice her mother's age. A year later, in 1948, Basombana was born. Her parents divorced when she was young. She described herself as an orphan living with family members who often treated her badly. In the end, an uncle helped her go to school. Basombana was an engaged student: 'I was always elected as the leader of the group… everywhere. It was like that—spontaneous; it didn't depend on me'.

She developed her competencies through participation in women's work in church. She was inspired by older women and '…later they also gave me the role of leading women during worship in church'. When she was 25, some women asked her to be president of the women in church: 'They told me "We will elect you as President." I said: "As President? Can I actually lead the *mamas* from all these communities?" And these *mamas* said, "We know you very well. We are sure that if we give you this responsibility, you will manage"'. Basombana accepted the challenge and believes that God helped:

> I was the preacher that day, and God helped me so much that when I had preached, all the women were touched by what I said. Even the women that had asked me how I could manage to lead them came to ask me for forgiveness. They said, "Oh, you're the servant of God, forgive us for saying that you will not be able to lead us."

Basombana interacted with the women in the communities, listened to their needs and initiated small projects using international funding. Later, she became the only female member in the executive committee of the church. She also discussed the challenges women encounter in religious organisations: '…we can elect women, but we don't give them the power to act as responsible women. And that really makes me feel bad'. She explained that women need courage to be able to talk to many people and actively participate in boards that often consist only of men:

> Every time there was something that needed to be said to the *papas*, they [women in church] said: "You are our leader. You have to advocate for us!" Moreover, I considered myself as a leader, because when I started to talk politely, in the papas' assembly, they listened to me. Sometimes they highlighted what I said because they often said that what this woman says is true, we have to implement it.

Basombana needed good mediation skills to appeal to several sets of people: the men running the church, the older women who were sceptical of younger women leaders and the younger women who were more educated than her. She said, 'I was a simple woman with little instruction, but now I'm working with women with university degrees, doctors etc'. Her strategy was to be humble and co-operate without discrimination. According to Basombana, a leader is someone who engages herself on behalf of others. She said women's engagement led to a marked improvement in women's work and representation in the church. They managed to, among other things, establish a department for women in the church. This was realised with the help of heavy lobbying for many years. News about what they achieved spread to other parts of the country and that made her proud.

Basombana has also served as the president of other associations. Twice, she was appointed as one of the women leaders of Bukavu and actively participated in politics. In 2011, she contested elections as a National Deputy. Protesting the violence against women was Basombana's main motivation. Her aim was to promote women's rights:

> …They killed those women and they were buried in the forest like that. I was shocked. And, no one wanted to talk about those women – not even the Provincial Deputies, who were in the Assembly. We asked them: "Can't you advocate in order to make it known what happened to those women?" They said "No, no, no, leave it, leave it, leave it". So, I decided to try to make it to the Assembly. And when there are incidents like that again, I will advocate for those women.

According to Basombana, women have political ambitions, but they often lack the means, especially financial, to run campaigns. However, she also acknowledges a change in gender roles, with more educated women willing to take on responsibilities.

Kusinza's Story

Kusinza was born in 1963. At the age of 4, her parents were divorced. As an only child, she was raised by father and grandmother. Her father taught her to do all kinds of work, including those typically associated with boys: 'He talked to me. He even gave me the responsibility to organise a party. He told me: "Go and kill that goat". I learned to slit a goat's throat at the age of 12'. Accustomed to working hard, Kusinza became a strong woman. Her father believed in her, but there was one challenge: 'He didn't want me to study. He saw in me a girl who could help her grandmother with the housework. But he didn't have the perspective that I could go to school'.

At the age of 12, Kusinza followed her cousin to school. When the teacher asked her why she did not attend school, she decided to start school even though she was much older. She was the best in class and received an out-of-turn promotion to a higher grade because of her skills. Because of her performance, the teachers let her continue even though her father did not always pay the school fees. At school, she was very good in political events: 'I was in charge of *Mopap*, the popular student event in school. I had to teach students songs about the movement, the songs of action that were linked to our President. It made me an authority, and I started to organise others'. Kusinza was also given the role of Virgin Mary in religious parades: 'I had my little Jesus, and I was dressed

in a white dress like a bride and a veil, and I had to march very slowly like the Holy Virgin. And, there was a long chain of people in front of me and behind me, and it was me – the Virgin Mary'. The different roles made people respect her:

> With all those roles that I played in the community, I don't think it passed without leaving any traces. It started to stir certain things in me. When I presented myself in a group, in church or in village meetings, in the service, I found gratitude. Me, I call that gratitude. I saw gratitude in the eyes of authorities, in the eyes of colleagues.

Kusinza also became engaged in the *Shirika*, the Catholic parish in her village. She was one of the people responsible for leading the Sunday service liturgy. The authorities also nominated her to be in charge of women and development.

Kusinza worked as a teacher at a Catholic school—a job she planned on leaving after her marriage. However, Kusinza cancelled her marriage to the man who had given her family the dowry after she realised that he was not good for her: 'I went through some difficult times because of the separation of my parents, and if I also get married in haste, it will lead to more difficulties in my life, and I will never be happy'. Later, she married a man she loved and had eight children with him. She did not know that he was a Protestant until the day they went to the pastor. Despite pressure, she refused to change her religious affiliation and gave the matter some thought. Eventually, she became an active member of a Protestant church. The church recognised her abilities and requested her to take on responsibilities:

> There was a voice there, which had done political events. There was a voice, different from the others. One day they told me: "You, over there, when you sing there is a nice voice coming out. You have to leave the last row, come forward".

In 2003, Kusinza was nominated to become a nation-wide leader for women in church and asked to contest the election:

> "*Mama* Kusinza, put your name. Put her name also on the board!"… When you come home, you have to thank God. Why is my name among those of the religious authorities in my congregation? There are others that seek this post, others who have the capacity to do it, but you see that they have given this post to you. And it's paid, it's not a voluntary post, it's a post with a salary.

As the head of the Women and Family Department, Kusinza received many opportunities, including to travel within and outside her own country, meet other women and receive training. Kusinza was a candidate in the political provincial elections of 2006.

Individual and Collective Values on Education of Girls

In this section, we explain *how* women leaders performed values work in South Kivu. How much agency did they have within the limits of their societal structures? The stories of Basombana, Kusinza and other women interviewed in this project reveal that *education* played a key role. On their path to leadership positions, women engaged in values work in formal educational spaces, hence obtained qualifications. The women leaders, *the who* of values work, collaborated and negotiated gender-inclusive values with parents, families and school authorities in a context of competing values and traditions. Although the right to education for girls and boys is enshrined in international conventions, many children have been and still are deprived of education. In the communities of the women leaders who participated in this project, education of girls was neither an implicit nor an explicit value. The leaders started school at different ages. Their social class and parents' values determined whether they received an education. Gender roles and the lack of educational structures did not help either. Some were encouraged by their parents to go to school, but others had to find their own way.

Basombana and Kusinza are examples of actors who negotiated values work as their practices competed with their parents' values. Kusinza recalled being concerned that her father did not want her to study. With

the help of other actors in society, who recognised the value of educating girls, both Basombana and Kusinza received a formal education. Basombana lived with her uncle who let her go to school. Kusinza got her chance when the teacher of Kusinza's cousin learned that she did not go to school. Because she performed well, the school let her stay even though her father avoided paying school fees. In other words, by studying well and by taking on different roles in school, such as being in charge of political events, Kusinza attained a special position within the school community, which led others to respect her. These roles left an impression: they gave her a voice that was noticed.

Today, women's access to secondary education has improved. Basombana notes that there is a change in gender roles because more educated women are ready to take on responsibilities. When she was young, she would sometimes be the only educated woman in a group. What this highlights is that the women leaders have engaged in values work by aiming for, demanding and completing higher education. Women born in and after the 1970s had easier access to university education. However, through their agency, they had to convince their parents that they were as capable as their brothers, to be sent to school. In general, the collected narratives suggest that the girls were dependent on their parents' values and that they had to perform well for their parents to see the value in educating them. In the end, managing to get educated was a result of explicit negotiation of values on the journey to leadership.

Values Work Within the Framework of Religious Civil Society Organisations

Ogundipe-Leslie (1994, p. 209) claims that African men view women as subordinate, especially within a marriage, even though the women may have many roles outside of it. One such social network where women can acquire leadership skills is within religious civil society, as reflected in the data above. How did the participants act to become leaders in church contexts within the frameworks of religion, culture and gender?

While women in general encouraged Basombana to get involved in church work, lead Sunday worship and announce her candidacy for the

executive committee, such spaces call for the negotiation of compatible and competing values with churchmen and elderly women. Women are eligible for posts in the church management as long as the position does not include power. To gain influence within the community and establish a platform of communication, Basombana relied on cultural and gender-sensitive approaches. For instance, she complied with the contextual expectations of feminine conduct, was humble and polite, showed respect to both genders and strove to get along with everyone (Ngunjiri, 2010; Skaine, 2010). She displayed courage, credibility and values work by acting for others, which to her was a leader characteristic. She engaged in projects that were internationally funded to improve community life. Her efforts showcased collective and community values in traditional Africa as well as the cultural knowledge of how survival depends on mutual exchanges across gender and age (Kessel, 2016). Her way of navigating practices challenged traditional boundaries.

Her story is an example of how an individual's values of desirable trans-situational behaviours can counter collective patriarchal values. In this case, the *who* contests the implicit values of subordination through explicit gender- and culture-sensitive entrepreneurial behaviour (Kluckhohn, 1951). By sharing one's understanding of what constitutes good practice and challenging the collective understanding of what is bad practice, the individual manages to create paths to leadership and involvement in the church management. Values interact between two sets of agents (Spates, 1983). Both genders trust and respect the agency of Basombana after seeing *how* the *who* acts.

In Kusinza's case, the church provided her with the path to leadership. By leading the Sunday service liturgy—a space historically dominated by men—she showed the courage and capacity to overcome traditional gender roles. Her familiarity with church work and with leading the Sunday service paved the way to more influential positions.

Both narrators considered human resources as important assets that enable access to informal and formal spaces of influence. Their reflections highlighted a sense of self-consciousness, self-confidence and experiences in church and community contexts that improved their self-awareness (Freire, 2012). They named their own talents: communication skills, the ability to encourage and inspire others and the ability to

gain trust. Contexts that deny women power reflect patriarchal values that situate women in inferior positions (Lerner, 1986); however, both narrators acted with agency in such gender-limited spaces. By deliberately challenging values that preserve patriarchal conduct, such as by taking on responsibilities in church and society, the participants influenced their own situations. Oduyoye (2004) notes that only if women engage in confronting cultural oppression can gender-inclusive African contexts develop.

Basombana's engagement in the church also had a spiritual aspect. She explicitly believed in God's assistance. Her spiritual experience was neither abstract nor distant. Faith in God is a reality that encourages women in African contexts (Kessel, 2014, pp. 92–95, pp. 159–180) as they are 'guided by their spiritual praxis' (Ngunjiri, 2010, p. xi). In many environments in Africa, the church is among the best functioning institutional structure within local communities. It is common to organise women's church work through movements, such as the Mother Union of the Anglican Church in South Africa and the Women for Christ in the Evangelical Lutheran Church in Cameroon (Kessel, 2014). Several authors have argued that women leadership in Africa requires organising women's groups and supportive leadership to overcome structures that prevent women from reaching high positions (Fenny, 2019; Madimbo, 2012; Wakahiu & Salvaterra, 2012).

Both Basombana and Kusinza exemplify how female leadership can evolve through support from groups of people within the community. They used available opportunities within the patriarchal structure of the churches to wisely, in the words of Ngunjiri (2010, p. xi), 'rock the boat without falling out'. They acted with courage and negotiated larger spaces for women's influence, for instance, by filling traditional male roles at a congregational and managerial level, such as leading the Sunday service liturgy and being a part of decision-making boards.

The Fight for Women's Rights

In Africa in general, mechanisms of domination over women prevent the application of equal rights and gender equality. Gender role expectations

of women are constantly negotiated with patriarchal values in any given context (Oduyoye & Kanyoro, 1992). Women's status in the patriarchal society of South Kivu does not generally enable their path to leadership. In fact, several of the women leaders, such as Basombana, were victims of domestic violence as children. For women to be considered inferior to men is part of the traditional social structure. This mindset affects how children and the women themselves are educated. At the same time, the leader narratives in this work also show how recognition from others are crucial to gaining the courage to take on responsibilities. Kusinza was a respected woman in the community, and Basombana was always elected as the leader of the group. Changing the value constraints to women leadership requires long-term values work in the family, in institutions and in the society at large.

For the women leaders, their family situation is either a barrier to or an enabler of their roles as leaders. A woman's engagement outside of the household can be viewed as a good or bad practice and is often dependent on her husband's values. Accordingly, some of the women leaders explained how they had been selective in choosing a husband: he had to be someone who understood them. For instance, Kusinza did not want the same fate as her divorced parents.

In addition to their husbands, women also have to deal with their families-in-law, who typically are not favour of women being active outside of the home. Some of the women leaders had to engage in values work within the family in order to continue their engagements outside of home. We strongly felt, from our interviews, that the courage and self-belief that strengthened women leaders' agency was often in conflict with the collective considerations of what was desirable and good practice for them as women. They told us, for instance, about incidents when they had to oppose their father, a boss or a politician, which resulted in grave consequences.

Women leadership trajectories are prevented by patriarchal contexts. Having said this, it is also important to add that the 1995 Beijing Platform for Action has led to more opportunities for women in education and leadership positions at many levels of decision-making. In spite of war and conflict in several countries, it is evident that some countries have managed to mainstream women into leading positions. This is the

case in Rwanda, which in 2007 had the highest percentage of women in the parliament in the world (48.8%). Many countries in conflict, such as the DRC, have adopted UN Resolution 1325 to guarantee women's presence at peace tables. However, given the ineffectiveness of the state, the civil society plays an important role in South Kivu. Its emergence can be attributed to both internal and external stimuli and the international donor community (Aembe & Jordhus-Lier, 2017). This civil society has led to contextual shifts where institutional environments have enabled new ways to engage in society. By leaning on the universal values of women's rights and challenging local values that viewed them as caregivers and *victims* of war instead of *actors* for peace, the women in the state carved their paths to leadership.

Ngongo (2009) argues that one of the most important contributions of women has been to promote, in communities and in peace negotiations, the issue of sexual violence. In a society where women are deprived of their fundamental rights, many are engaged in advocating for women's rights. In fact, victim accounts of sexual violence, the need to provide them with medical and practical help and making them aware of what happened to them have motivated many women to engage in civil society organisations and in politics. Women leaders who work as journalists advocate through the media and have been awarded international prizes for their work. Among our participants, Basombana listens to women's needs and initiates projects that are internationally funded. She had also approached the Provincial Deputies and asked them to talk about what was happening to the women. Silence on the part of politicians pushed her to run for deputy elections.

In their narratives, women leaders described a woman's status in South Kivu as an enduring obstacle to their advocacy efforts towards women's rights. The participants told us that while women may know what the right thing to do is, they do not always have the power to implement it. For instance, Basombana identified the lack of financial resources as a barrier to contesting elections. It is plausible that a similar lack of finances may be an obstacle for values work and for promoting women leaders.

Concluding Remarks

This chapter marks a contribution from the Global South on women's access to leadership through values work. The life narratives of women leaders in South Kivu, DRC, *the who* of values work, offer insights into *how* women compete and negotiate traditional and gender-inclusive values in a patriarchal society ridden by war, violence and conflict. As illustrated in the narratives of Basombana and Kusinza, women perform values work on various levels on their paths to leadership. Contextual shifts, due to international influence and an increased role of civil society actors, assist their values work. They strive to acquire an education, even though their parents do not value girls' education. They negotiate and advocate for space for women leaders within religious civil society organisations. They fight for women's rights together with other women leaders. Apparent in the stories was community support for values work within families, communities, institutions and in society at large. This illustrates how values are articulated and re-articulated and are dynamic in different contexts and groups. Women gain access to leadership through negotiation of values and connection both to the international and to the collective's values work. The narrators' strategic choices are deliberate and facilitate access to influential spaces and relationships in social and institutional networks.

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Part III

How Is Values Work Performed?

10

Catching Values in Flight: A Process Perspective on Researching Values in Organisations

Gry Espedal

Introduction

During the last few decades, the concept of process studies has become increasingly visible in social studies (Langley, Smallman, Tsoukas, & de Ven, 2013; Langley & Tsoukas, 2010, 2017), incorporating a new stream of how to study values work (Gehman, Trevino, & Garud, 2013; Vaccaro & Palazzo, 2015; Wright, Zammuto, & Liesch, 2017), shedding light on how values work is shaping organisational forms, practices and activities. Values are part of the construction of the organisational life (Gehman et al., 2013), and we need approaches that help to identify and investigate the performative work of values in organisations, including temporal and relational aspects. In this chapter, I propose that studies of values work have not gone far enough in investigating how values institutionalise practices in organisations. Therefore, this chapter aims to investigate the question of how process studies can contribute towards

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identifying values work as *strong*-process studies, as how reality is brought into being in every instant, as well as *weak*-process studies—as interactions constituting institutionalising processes in organisations.

Throughout the decades, research on values has utilised a quantitative approach treating values as positivistic facts, measuring the degree of commitment to perceived values. For instance, the World Values Survey has carried out national surveys on values (Inglehart, 1977), and there have been studies on the effects on social cultures (Hofstede, 1980) and the motivational dimensions of values (Schwartz, 2006). Values have also been studied through using qualitative methods such as action research to investigate a reflective process for improving values work in organisations (Aadland & Skjørshammer, 2012). Leaders are also shadowed to investigate their actions in relation to values (Askeland, 2016).

We can ask if these methodological approaches capture the mechanisms of values work in organisations, especially regarding how they are formed and informed by practices. Quantitative surveys identifying values investigate values as facts and not as intentional social objects or social practice. Action research pays more attention to the inquiry processes than to studying values work per se. Shadowing the practices of leaders in action does not capture the deeper temporal organisational engagement of values inhabited from the past and their influence on future standards of behaviour.

In organisations, there are many processes going on at the same time (Hernes, 2016). Actors operate within structures, technologies and legal systems. They are involved in history and in stories from the past, as well as processes which impose corporate strategies, visions and goals for the future (Hernes, 2014). These ongoing processes point inwards to occurrences within the organisations, but they are also based on responses and pressures from the outside. Process studies aim to unpack events in order to reveal an understanding of the complex activities and transactions that occur in organisations and contribute to their constitutions (Langley & Tsoukas, 2010). As such, studying values as an organisational process can give insight to the underlying mechanisms, consciousness and broader awareness of value patterns in organisations.

Current studies of values work highlight values work in organisations as processes of ongoing performances situated in everyday practices

(Gehman et al., 2013). Previous research on values is criticised for pursuing values work through cognitive and cultural lenses. Instead, the new stream of values work studies is enhancing values work performed and provoked in organisations as various types of processes articulating and accomplishing the desirables in relevance to right and wrong actions and behaviours (Espedal, 2019; Gehman et al., 2013).

Gehman et al.'s (2013) study proposes the concept that values work is comprised of key interrelated domains, such as concerns, networking and being part of value practices and discourses. Their study is followed by a few others, including a study on how change agents use values strategically to transform the highly resistant institutional setting of paying *pizzo* to the mafia at Sicily (Vaccaro & Palazzo, 2015) and a study showing how the values of healthcare professionals are maintained in everyday work (Wright et al., 2017). One recent study identifies a process of value inquiry that is used to question the dominant value frames in situations of institutional pressure. Through a systematic analysis of three highly value-salient issues within a faith-based organisation, the study theorises the process of value inquiry as an open-ended process of questioning and reinterpreting the meaning of the dominant value frames. To adapt to this situation, institutions are inquiring the dominant value frame in order to seek out and find institutional values and practices to form new behaviours that realign with the common good and the values and agency of the organisations (Espedal, 2019).

In this chapter, I suggest that future developments in studying values work in organisations should include process perspectives. One may question if the recent stream of studies of values work in organisations has gone far enough in including the process nature of institutions and institutionalisation in their investigation of values (Surachaikulwattana & Phillips, 2017). Therefore, in this chapter, I will cover how values work enhance actions and agency in influencing actors and institutions exemplified through a recent study of values work in a faith-based healthcare organisation.

Process Studies and Values Work

Scholars have been engaging in a rather new field of process studies. Since the late 1990s, researchers have taken an explicitly agentic view of organisations and organising, researching routines, innovation, change, identity, strategising, decision-making, learning, knowing, communication and organised action (Langley & Tsoukas, 2017). Several articles and books have described process thinking, process theorising and process research (Hernes, 2014, 2016; Langley, 1999, 2009; Langley & Tsoukas, 2010, 2017). Since 2008, the interest in process studies has gathered researchers at Process Organization Studies (PROS)—a yearly conference focusing on studies in organisations that are grounded on process metaphysics—seeing processes, rather than substances, as the basic forms of the universe

Weick (1995)'s work on organising is highlighted as being revealing for process studies (Langley & Tsoukas, 2017). The foundational notion of directing attention towards *organising* rather than *organisation* enables a new line of inquiry. This new emphasis invites scholars to examine how settings of interaction become organised, rather than hitherto research viewing organisations as already constituted entities. Organisation is highlighted 'to assemble ongoing interdependent actions into sensible sequences that generate sensible outcome' (Weick, 1979, p. 3). The researchers' task is to explain how organisations (the process) emerge. Key themes of process approach can include relationality, agency, constrained interactivity, emergence and open-endedness (Langley & Tsoukas, 2017).

Process studies can be identified as strong- or weak-process studies (Bakken & Hernes, 2006). Early studies of values and practices in organisations have studied values through a weak-process perspective. This perspective emphasises interactions as constituting processes. Weak-processes assume that, for the most part, the task of process research is to provide arrows that connect pre-existing, relatively stable boxes in order to understand the temporal evolution of things or substances that nevertheless retain their identity over time. Through this perspective, organisations are viewed as relatively stable entities, time is primarily beheld chronologically and change is something that happens to the organisation (Langley & Tsoukas, 2017).

The examining of an introduction of core values and the investigation of how they influence activities and actions might be identified as a weak-process study. Often, core values' visibility is connected to being promoted in organisational strategies and mission statements. Core values are established among other activities, and the process might be identified as how values influence or change practices. Falkenberg (2006) has done a Norwegian study that investigates organisational core values through a weak-process perspective; this study investigates the characteristics of organisational core values.

Two other Norwegian studies can be characterised as being close to weak-process studies. Askeland (2014) includes institutionalising perspectives in understanding leaders' work and practices. This study argues that leaders may have a significant contribution to the institutionalisation process for the interpretation of the mission and the shaping of values in faith-based welfare organisations. However, the arrows that connect the pre-existing identity and mission point to relatively stable boxes that allow leaders to understand how they carry values that facilitate the temporal evolution of their organisations. Leaders are the subject, conveying value orientation through policy documents, and leaders build value orientation into the governing structures of their organisations. This study investigates leaders as actors and examines how they influence faith-based welfare organisations to maintain their value base, but it does not give insight to how values as a *verb* (valuing) constitute the conditions for this process (Bakken & Hernes, 2006).

Aadland and Skjørshammer (2012) studied a faith-based healthcare organisation and the enhancement of humanistic and moral values through an action research process, identifying how the organisation is part of the societal processes of secularisation and pluralisation. The process identified in this study is closer to a strong value study that identifies values work and value discourses. The arrow in this study initiates a value process pointing to value discussions as generating ethical reflection and increasing the moral sensitivity (Eide & Eide, 2008). The study describes how values work affects ethical work in the organisations, but we are not given insight into how values work per se influences this process.

In strong-process studies, change is not necessarily investigated as something that happens to things but as how reality is brought into being

in every instant. The emphasis is on 'arrows all the way through' (Langley & Tsoukas, 2017, p. 4), which means investigating how phenomena are constituted through the work that agents do. The study conducted by Gehman et al. (2013) is characterised as a *strong-process study* (Langley & Tsoukas, 2017, p. 4), which examines organisational values as a form of practice that is continually constituted and adapted through ongoing work enacted by organisational members.

Using process lenses, inspired by the practice theory of Schatzki (2002) and Dewey (1939), Gehman et al. (2013) conducted a ten-year study of the development of an honour code in a business school, where they looked for different processes in which the concept of values work was interrelated with organisational activities. Based on conveying archival sources, ethnographic observation and stakeholder interviews, Gehman et al. (2013) generated a new theory on understanding values as situated in practice. The process of values work was identified as emerging through dealing with *pockets of concern*, knotting local concerns into action networks and performing actual value practices that are circulated in value discourses.

Gehman et al.'s (2013) study has contributed to other studies of the effects that value practices provoke in organisations (Daskalaki, Fotaki, & Sotiropoulou, 2018). Rather than a top-down procedure, it is through discussions, negotiations and ongoing community collaboration that value ideology is performed (VanderPal & Ko, 2014). Despite the prevalence of the research, it is questionable whether Gehman et al.'s argument goes far enough in relation to investigating the work as part of the institutionalising processes. The study conducted by Gehman et al. (2013) implies a linear sequence where values (in the form of an honour code) first emerge in response to various concerns and are then practised. We can ask if the theory sufficiently emphasises the conditions of embedded agency and the role of institutional agents in relation to developing the institutions of value practices. From a strong-process theory, *all* values work, whether claims to core values by leaders or the enactment of professional values in everyday work (Wright et al., 2017), are constitutive acts (Ashcraft, Kuhn, & Cooren, 2009) that serve a performative function in constructing people's understanding of organisational life.

Vaccaro and Palazzo (2015, pp. 1094–1095) come closer to recognising values work as an institutionalising process, leaning on Schwartz's (1996, p. 2) definition of values as 'desirable, trans-situational goals'. As such, this study goes beyond the observation of emerging value practices by showing how change agents can use values strategically to transform a highly resistant institutional setting. This process involves viewing values as a motivational factor guiding principles in people's lives, challenging and changing highly resistant institutions through five micro-processes used to leverage values in interaction with stakeholders: hooking, anchoring, activating, securing and uniting.

Process Studies' Role in Enhancing the Temporal and Relational Aspects of Organisational Work

Time, timing and *temporality* are inherent in process studies, based on the notion that 'No motion is possible without the category of time' (Sorokin & Merton, 1937, p. 615). The notion of time goes beyond the chronological conception of clock time (Ancona, Okhuysen, & Perlow, 2001) and temporality can be enhanced in organisational processes by being viewed as an ongoing relationship between past, present and future (Schultz & Hernes, 2013). Actors' ongoing present activities are continually enacted from past experiences by using presently available materials to enhance an organisation's future (Mead, 1932; Schultz & Hernes, 2013). This temporal aspect presents a unique opportunity to study values as part of the situated agency, and how it is informed by the capacity to imagine alternative possibilities (Emirbayer & Mische, 1998, p. 963).

Within various aspects of temporality, it is highlighted that 'process studies meet practice' (Langley et al., 2013, p. 5). Process studies draw upon the past and make it relevant to the present. This process is not viewed as a random exercise but as one that deepens the social practice in which actors are embedded. This can be seen, for instance, in the study conducted by Vaccaro and Palazzo (2015), the process of values

work carried out by Addiopizzo is changing the practice of paying pizzo to the mafia by focusing on the processes of dignity and legality.

The *relational* aspect of organisational work is clearly processual. Experience is the deepest character of nature that bursts into existence in each moment (Mesle & Dibben, 2017). We live in a complex world, and we need to understand what factors establish order and stability and how to achieve any degree of richness of experience. Investigating value processes can grant insight into relational power and the growth of values in our personal and communal experiences. Included in this are investigations into what is required to sustain relationships and supportively engage with others in an ongoing way. When studying the relational aspects of processes, values become an important mechanism for identifying who we are as people caring about various things in the world around us (Bednarek-Gilland, 2015). Whitehead (1957) highlights values as having an intrinsic nature, including a sense of immediate self-valuing. Values nurture intentional openness in ourselves and others to the complexities and the contrasts in the world around us (Mesle & Dibben, 2017).

We are never neutral towards the things we care about (Bednarek-Gilland, 2015). We try, test and make subjective justifications, which again gives us ideas of what is good and how life might be lived. As such, values can be defined as things that matter to us trans-situatively—in specific situations as well as beyond the specificity of any situation—and trans-subjectively—not only for myself, but also for others (Bednarek-Gilland, 2015, p. 19).

Values as Part of Institutionalising Processes

Part of old institutionalism and recent streams of institutional theory can be identified as process studies (Surachaikulwattana & Phillips, 2017). While new institutionalism characterises institutions as stable and taken for granted (Meyer & Rowan, 1977), the field has seen a shift from stability to institutional change and agency since the 1990s. The new trajectories of institutional work (Lawrence & Suddaby, 2006) and institutional logic (Friedland & Alford, 1991) have involved a growing focus

on understanding and unravelling the processes and mechanisms of institutionalising by investigating how institutions are created, maintained and transformed as well as establishing a foundation for a social order (Surachaikulwattana & Phillips, 2017).

Values as part of the organisational processes of institutionalism are highlighted by Suddaby, Elsbach, Greenwood, Meyer, and Zilber (2010). Leaning on Stinchcombe (1997, p. 8), Suddaby et al. argue that people accept institutions, not because these institutions have the right answers, but because they embody 'a value that people accept' (Suddaby et al., 2010, p. 1235). For years, Selznick (1957, 2008) has highlighted values and ideals as part of the institutional processes of constructing the agency, actions and practices of organisations. This includes looking at organisational pressures and rivalries not as forms of mobilising individual egotism but as a natural social process in which the intention is to ask the right question on which ideals to treasure. Institutionalising then becomes a means of infusing the organisation with values beyond the technical requirements at hand in order to work on the institution as a natural product shaped by social needs and pressures (Selznick, 1957/1983, pp. 5, 17).

Investigating Values Informed by Process Studies—A Strong-Process Perspective

To understand values in leadership and organisations and their temporal and relational aspects, we need strong-process studies that investigate how values work is conditioned by organisational work and practices and how it is institutionalised. Since few have investigated the processes that enable the conditions for human agency and actions to maintain, change and disrupt institutions and values work from a strong-process study perspective, I will proceed by giving an example of such research in one faith-based organisation (Espedal, 2019). Many of the most obvious methodologies for conducting empirical research from a process perspective are not new in and of themselves. Historical analysis, ethnography and narrative approaches are well-established methods of natural analysis of evolving temporal phenomenon, but will be presented here,

since they present ideas of process sensitivity. The case example represents a unique case (Yin, 2014) of being rich in the phenomenon of values work throughout 150 years of institutional history. Leaning on its history and conveying a triangulation of methods consisting of archival sources, ethnographic observation and semi-structured interviews, a five-year study on values work in this faith-based organisation was conducted.

Identifying the processes of values work in the organisation was implemented through studying processes from the *outside* and from *within* (Langley & Tsoukas, 2017). Studying a phenomenon from the inside involves an effort to capture the evolving meaningful experience; in this case, looking at how meaning is taken care of by management and how the identities and callings of institutions are resurrected through values work. In the case of this organisation, the research was implemented through ethnographic work involving semi-structured interviews asking managers and employees at different levels open-ended questions about the organisation's activities, challenges and major concerns, as well as asking questions about how they saw values processes and value priorities at work.

To establish a process-sensitive approach, two approaches were conducted. First, catching the values in flight was implemented through asking questions starting with *how*, bringing in the temporal structures of the organisation's social practices and the uncertainty and urgency that were inherently involved in them (Langley et al., 2013). The driving assumption behind process thinking is that social reality is not steady state. It is a dynamic process. The overriding aim of the process analyst is therefore to catch the reality in flight, including values (Pettigrew, 1997). Open-ended questions regarding activities, challenges and the major concerns of the leaders and employees were asked, including question of how they knew that stories made a difference to people at work. Additionally, it was asked 'At work, what are the most important and difficult discussions you encounter?' and how the interviewees saw values processes and value priorities in their work.

Second, to identify the organisational aspects of reality *in flight*, sudden ruptures of change or the *verb*-influenced day-to-day practices that occurred in an unexpected, non-routine manner were observed and identified. A way to identify relevant changes and unexpected events can

be shown through shadowing leaders (Czarniawska-Joerges, 2007) and looking for how events and actions were connected to ongoing value discourses. The aim was to investigate and observe values work in vivo in social situations. The observations were especially driven by an interest in investigating the performance of values work, but the observers were also engaged in questions about how values work is organised through talk and interaction.

A process-sensitive approach can also be to study a process from the outside, capturing the process through which a phenomenon developed over a chronology of time, with emphasis on how and why it happened or changed or on following changes of events set off by an incident or by accident (Van Hulst, Ybema, & Yanow, 2017). In these studies of practices, a process researcher might move from treating these phenomena as stable entities to seeing them as entailing recurrent bricolages, breakdowns and improvisations. In the case organisation, it was when starting the analytical work on the data that the process of value inquiry emerged. A narrative approach (Rantakari & Vaara, 2016; Riessman, 2008) was used to elicit the values work and value practices of the case organisation. Narratives play a key role in organisation process research due to their temporality, providing descriptions of sequences of events (Ricoeur, 1984). Narratives can offer knowledge of human intentions and deeds (Czarniawska, 2004, p. 650) and can play a crucial role in forming a landscape of action (Bruner, 1986). Accordingly, narratives can provide information on how things become organised (Boje, 1991) and on how members make sense of things (Boje, 2008).

Stories and episodes crucial to the organisation were added to a timeline, and tables were created for events, identifying their aims, actors, motivations and financial platforms. The historical timeline was bracketed into periods to compare and identify the different elements that facilitated the process of values work in the case organisation (Langley, 1999). In 1991, a chaotic situation was identified in the case organisation, as the hospital's existence was threatened by the municipality's suggestion to shut down the institution due to financial difficulties. This chaotic situation led to the establishment of a new strategic plan (2002) and a renewal of the organisational mission through launching two new core values: compassion and quality. The value of compassion pointed

backwards to the practices of the case organisation over 150 years, and the value of quality was an answer to the demands and expectations of the healthcare authorities who funded the hospital. Therefore, values were studied retrospectively by looking back in time using archival sources such as annual reports and minutes from the board, as well as prospectively by observing the organisation and interviewing people at different times to deepen the investigation. Going through the data material, the author of the study searched for information-rich cases by using an intensity sampling approach (Patton, 2002, p. 234) that located value-salient issues. In zooming in on these stories, the author identified underlying assumptions for each issue and named them as elements of the *process of value inquiry*, including questioning the dominant value frame, reframing and reinterpreting and realigning values work.

The analytical work and theorising of the value inquiry process extend the emerging research on values work by highlighting the institutional work of organisation members and stakeholders as moving beyond a linear view of institutional complexity to maintain and change values and organisational agency in the face of plural demands. Unlike Gehman et al. (2013), this study does not reserve the term *value practices* for demarcated and recurrent bundles of actions that met specific time-bound concerns, such as the performance of an honour code. Instead, this study found values work as include any set of acts in everyday work as being value-driven, and values work to be a particular set of actions that enhance the ongoing knowledge and reflection-creating processes that infuse an organisation with value-related actions (Espedal, 2019).

The process of value inquiry was identified as an open-ended process of questioning and reinterpreting the meaning of dominant value frames by continuously asking self-reflecting questions, such as 'What is our contribution now?' and 'Are we reaching those we are here for?' (Espedal et al., 2019). The process of value inquiry elaborates on the temporality and intertextuality of values work, suggesting conditions under which value inquiry becomes a dominant microprocess of building organisational meaning-making. The process of value inquiry occurs amidst a need to accommodate external demands and balance internal agency and

practice. The process of self-reflection and the integration of values establish a central logic that guides and realigns organising principles and provides the organisation with a vocabulary of motive and sense of self.

The process of value inquiry is a response to a request from scholars of the institutional work tradition to investigate the relationship between actions and creation and between the maintenance and transformation of institutions (Lawrence & Suddaby, 2006). It has been suggested that institutionalising processes affect institutions at a micro-level (Lawrence, Suddaby, & Leca, 2009; Tolbert & Zucker, 1996). These institutionalising processes infuse the organisation with values beyond the immediate technical requirements and work as a natural product in relation to social needs and pressures (Selznick, 1957/1983, pp. 5, 17). As such, this values work establishes a link between actions, agency and institutions.

Concluding Remarks

This chapter asks how process studies can contribute towards identifying values work and the institutionalising processes of values work in organisations. A new stream of values work studies is shedding light on how values work processes are shaping organisational forms, practices and activities. These process studies aim to unpack events to reveal an understanding of the complex activities and transactions of values work in organisations. However, one can ask if the recent stream of values work studies goes far enough in including the process nature of institutions and institutionalisation for instance through strong-process studies studying how reality is brought into being in every instant. In the illustrative study on a highly value-salient organisation, it is highlighted how process studies of values work can be conducted. The methodological approach being used conveys a triangulation of methods consisting of archival sources, ethnographic observation and semi-structured interviews. The described research project asked *how* activities, challenges and the major concerns of the leaders were enhanced through values work, bringing in temporal structures of social practice and looking for unexpected non-routines or sudden ruptures of change. The agentic capacity that the values were

producing in the case organisation was used to identify how the organisation reorganised and reconstructed the habits and institutional agency through a process of value inquiry. The process of value inquiry established a profound process of institutionalisation meaning-making within the organisation.

As future studies, the processes of values work could be investigated in relation to several other topics. An interesting future process study could involve investigating the values work involved in for instance the worldwide #MeToo campaign, either with an insider or an outsider perspective. The #MeToo campaign started in October 2017 in the Hollywood film industry and has become a virtual revolution across the West. This campaign has swept over Europe, with uprisings in different countries, including within professional groups in Norway. Many have used the subject node and shared stories in virtual media. Under the keyword #stilleføropptak (silent before shooting), the Norwegian newspaper Aftenposten published several stories together on 16 November 2017 with an appeal signed by almost 600 Norwegian actresses.

It would be interesting to investigate the #MeToo campaign and the various associated mechanisms, issues and factors through examining how processes have maintained and changed the desirable modes of institutional values such as respect and disrespect. How are people's experiences with disrespect and violence establishing patterns of action? How are people re-establishing human worth through the campaign? How is this values work related to the development of moral work and ethical attitudes? Stories presented in testimonies complemented with news articles, blogs, columns, Facebook posts and letters to editors could be the objects of studies. The #MeToo campaign has led to an increased awareness of managers' responsibility to prevent the problem and react in an active manner. In this regard, a question of investigation could involve identifying good practices and systems that establish people's safety when, for instance, making others aware of unwanted relationships at work.

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11

Values as Fixed and Fluid: Negotiating the Elasticity of Core Values

Stephen Sirris

Introduction

Values connect ideals and actions as they are 'conceptions of the desirable which are not directly observable, but evident in moral discourse and patterns of attitudes forming value orientations with relevance to action' (Van Deth & Scarbrough, 1995, p. 46). Similarly, Chapter 1 of this book reflects this connection by defining values as 'individual and collective conceptions of desirable behaviours, objectives and ideals that serve to guide or valuate practice'. The present chapter extends our understanding of the interaction between values and practices by utilising a critical perspective on how values are externalised in the work of organisations and managers. Organisations have multiple values that provide guidelines to potentially different courses of action. Such plurality is reflected in studies that categorise values into clusters such as professional, personal or organisational (Cameron, Quinn, DeGraff, & Thakor, 2014). These sets

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of values are safeguarded by various actors. The relation between value sets may range from conflicting to complementing.

Several scholars have shed light on tensions between organisational values. It is well known that replacing existing core values and introducing new ones is a challenge (Rokeach, 1973). In fact, Gehman, Trevino, and Garud (2013) claim that the act of defining core values has received more attention than the process of implementing them. The process of values replacing one another through institutional change has been described by Cha and Edmondson (2006) and Wæraas (2018). Moreover, the tensions between values are highlighted in the distinction between espoused values and values-in-use (Argyris & Schon, 1978). Cha and Edmondson (2006) also noted how various interpretations of values may give rise to accusations of hypocrisy, owing to the gap between one's saying and doing. Further, values have also been studied as stemming from the institutional logics that are relevant to organisational members (Cameron et al., 2014).

Instead of studying the dynamics between value sets, this chapter examines how the same core values are pursued in different ways and for different ends. Core values constitute a specific set of values that serve to provide a sense of unity. Internal to organisations, core values are identity markers, signalling stability and consistency across organisational structures. They operate at an aggregate level and may be the result of internal consensus as well as approval from wider constituencies and stakeholders (Wæraas, 2018). However, even if values are shared verbatim across organisations, their interpretation in contexts tends to be unique because these contexts are related to people and the organisational history, practices, culture and structure (Schein, 2010). Importantly, the stable yet contingent nature of core values implies tensions and sets the scene for institutional complexity. However, this paradox can easily be overlooked, also by researchers, since values are primarily used to express identity: the enduring, unique and central characteristics of an organisation (Albert & Whetten, 1985).

Situating this chapter in the perspective of values work, I examine how managers negotiate core values within a firmly established and thriving organisational value discourse. I present a case study of a sudden interruption that triggers values work. I analyse how the discourse manifests

in local discussions when actors reconstruct the core values in particular settings. This study of the interplay between discourse and managerial efforts is undertaken in a faith-based hospital, which is a rich setting for values work. The case study reports an acute infection crisis where managers in two departments strategically activate and reinterpret the hospital's core values.

My theoretical interest lies in analysing the mechanisms that affect this type of values work. More particularly, I explore the ambiguous nature of values by examining the tension between values that seem *fixed* at an organisational discursive level and *fluid* at an individual managerial level. This study explores how values that are initially articulated to promote unity and consensus are subject to the dynamics of conceptual stretching. I conceptualise this stretching as value elasticity which develops the notion that values are ambiguous. The overall aim of this chapter is not only to improve the understanding of how managers engage in values work when negotiating values but also to propose a renewed conceptualisation of such efforts. The research question guiding this work is *how do managers negotiate core values as fixed and fluid?* In the following sections, I further clarify key concepts and ground my study. Subsequently, I present the research context and methods, describe the case, discuss the main findings and present my concluding remarks.

Theoretical Perspectives on Core Values as Fixed and Fluid

Goals and means are constantly negotiated in managerial practices. According to Selznick (1957), managers' primary—and paradoxical—job is to maintain organisational values while simultaneously adapting to changes. Managers essentially safeguard what organisations tend to consider their basic values. The fixed aspects of values are their central, distinctive and enduring qualities. However, as organisations evolve, they risk deviating from their original goals. This drift can occur in the mission and values because of their abstract or 'fuzzy' nature. Values are not entirely fixed, even though organisations may articulate their core values clearly. Actors engage in a dynamic interplay of values and tend to

employ new interpretations. The same values can refer to different ideas for different people and encapsulate various meanings, signalling fluidity.

Often, employees turn to managers to provide meaning on ambiguous events. Values are by nature ambiguous—capable of carrying historical ideology and allowing for differing views and motivations to promote their acceptance. According to Eisenberg (1984), ambiguity promotes 'unified diversity' for the organisational members and hence facilitates organisational change. When a value allows for varied classifications, it is deemed ambiguous:

> Values are expressed in this form because their equivocal expression allows for multiple interpretations while at the same time promoting a sense of unity. It is therefore not the case that people are moved toward the same views (in any objective verifiable sense) but rather that the ambiguous statement of core values allows them to maintain individual interpretations while at the same time believing that they are in agreement. (Eisenberg, 1984, p. 232)

This citation displays a relativist view of meaning, which is contextual and constructed. Ambiguity implies a lack in both message attributes and receiver interpretation, typically evident in situations where equivocality is absent. Omitting contextual cues allows for multiple interpretations. A strategic use of ambiguity serves to accomplish goals, and inconsistency of goals may increase flexibility. Ambiguity thus balances the organisational needs for both individuality and community, which are essentially paradoxical. Ambiguity is well known in relation to reforms, which call for institutional work, and lends to creativity and agency, in which individuals may exploit a reform to their own interests (Thelen & Mahoney, 2010).

I argue that although core values are fixed by definition, they are negotiated and altered in ways that reveal their elasticity. Core values are subject to ongoing tensions. Gehman et al. (2013, p. 105) commented on this fluidity in the following words:

> Even when the "same" values (such as honesty and transparency) were invoked, those involved drew from disparate personal, organizational, professional, institutional, and societal understandings and experiences

> to interpret and assign meaning. What appeared to be agreement about the importance of specific values on the surface revealed a plurality of understandings at a deeper level, sometimes even leading those involved to reach opposing conclusions about the appropriate practices to pursue.

A value discourse may be contested in terms of practices that are deemed valid manifestations of the core values. Discursive practices encompass the more dynamic or even fluid properties of core values when negotiated and lead to divergent configurations of practices. Whereas rules are direct guidelines in articulated situations, values are indicators for actions and offer room for discretion. For example, when core values are interpreted in health care, they are presumably expanded to include elements of professional values (Sirris & Byrkjeflot, 2019). When the contents of a given value are substantially altered, actors interpret the value to include other notions or practices than typically assumed to be contained in the core value. Metaphorically, defining the boundaries of a given value involves conceptual stretching by contracting or expanding the contents of the value (Cha & Edmondson, 2006). I study the dynamic tensions between core values that are fixed and fluid by terming the conceptual stretching as value elasticity. I argue that although core values by definition are fixed, actors negotiate and alter values in ways that show elasticity.

Research Context and Methods

To study managers negotiating values within a distinctive organisational discourse, I employed a method that allowed access to sayings and doings at a micro-level. This chapter reports parts of a larger ethnographic fieldwork involving a single case study conducted within a hospital, which consisted of interviews, observations and archival material.

Research Setting and the Values Discourse

Hospitals are well known for institutional pluralism and multiple institutional logics. My case hospital is located in a larger Norwegian city and

functions as local hospital with some specialisations. It has 1700 employees and three managerial levels and caters to a catchment area of 150,000 residents. This particular context and organisation are value laden due to the history of the organisation and its challenges stemming from being diaconal or faith-based. The hospital has over the last decades actively sought to reformulate its Christian mission and identity through several projects on core values. Values may serve as stepping stones between the sacred and the secular, facilitating dialogue between the diaconal history and traditional Christian imagery on the one hand and the growing demands and expectations of the state to deliver welfare services in an increasingly secularised manner on the other (Askeland, Espedal, & Sirris, 2019). The resurgent attention towards values among faith-based organisations is characterised by the dual context of religion and a secular society (Aadland & Skjørshammer, 2012). Both share an interest in ethics, despite growing individualistic and anti-dogmatic spirituality.

My case hospital has a strong and long-standing value discourse that has prompted extensive projects on the role of values within the organisation, involving comprehensive processes, managers and employees. The hospital's chosen core values *quality, justice, service* and *respect* manifest in many ways and constitute a value discourse inhabiting the organisation and profoundly permeating it. Table 11.1 lists the central value statements obtained from an analysis of the hospital's documents. This chapter explores how unexpected and acute changes triggered the managers to negotiate these values. The case I will discuss was a sudden outbreak methicillin-resistant *Staphylococcus aureus* (MRSA) infection in the hospital.

The value discourse was incorporated into practices like seminars for new employees, which introduced the core values and its history. Managers also had a value codex as part of their training programme. Plenary settings were arenas for interpretation of the diaconal tradition and values. The CEO actively shared narratives across the organisation about the hospital's founder and the Good Samaritan. He saw it as his mission to articulate the expectations of employees in order to enhance the core values. Narratives served as models for value practices, displaying good examples for others to live by. Moreover, there were several positions such as deacons and chaplains at the hospital. In every department,

Table 11.1 Hospital value discourse

Bylaw statements	Strategic plan statements	CEO's operational statements	Values and value explication in policy documents
The hospital is administered by bylaws set by the owner and Norwegian health law and agreements made with regional healthcare authorities The hospital identifies as ecclesial and diaconal	Vision Pioneers in care for human beings in distress. Renewers in service for our neighbours Motto: Engaged for humans and in the belief that each human being has value as created in the eyes of God, creating a mutual community with God and fellow human beings	The identity is based on 126 years of serving (diaconia) Continue in the same spirit, challenge, do something outside the mainstream and essentially serve the common good The key objective of the hospital is to ensure that patients receive the best possible treatment	Respect: Understanding and respecting the complex needs of vulnerable patients and their kin as well their personal integrity and characteristics Quality: The hospital's services should be of high quality by ensuring commitment to professional competency and best practices Service: All cooperation among patients, kin and employees is an opportunity to offer services, be available and express compassion and care Justice: The hospital will safeguard patients and their kin's rights, represent vulnerable groups and strive for the right and effective use of resources

there was a part-time diaconal nurse. Another channel was the provisions of gifts with diaconal spirit as well as books and magazines emphasising the organisation's values and identity.

Data Collection and Analysis

Data collection for this study was completed between January and June 2016. Data were collected by 10 days of shadowing two nurse middle managers. This process gave access to both actions and interpretations (Denzin & Lincoln, 2005). By following managers around as they were doing their work, I was able to capture all the activities of the managers for a workweek. Moreover, I interviewed them before and after the shadowing session on managerial roles, co-operation, tasks, challenges and issues they found relevant. Additionally, I interviewed the CEO, two of the managers' superiors and ten subordinates. In total, 15 interviews were performed in Norwegian, recorded and transcribed verbatim. Relevant hospital documents and webpages were analysed. The chapter offers empirical evidence by focusing on how a dramatic situation triggered specific measures that interfered with the daily routines of the units, and how the two managers adopted different strategies for coping with the situation.

Importantly, I chose two hospital units to study how the exact same values were negotiated differently. The first part of my analytical strategy involved thematic coding (Denzin & Lincoln, 2005). The material related to the infection crisis was easily identified and subjected to open coding. Then, I wrote summaries as narratives of the event from the perspectives of each manager, which are presented below as case descriptions. From this analysis and in-depth descriptions of actions, interactions and intentions, emerging from both the interviews and the observations, I developed categories and themes from the data as exemplary quotes and codes. I analysed the notions that core values encompassed and tabulated the articulation of the values. The key insights from the analysis pertain to how managers align practices with core values.

Case Description and Findings

Departing from the notion of values as both fixed and fluid within the hospital's value discourse, I describe the interrupting event that triggered the values work. The data highlight certain mechanisms in the values work, which represent the main themes of the analysis: framing, targeting, negotiating, and a new practice as the outcome.

Framing

The disruption reported in this case occurred rather suddenly—an outbreak of MRSA infection. During the outbreak, I was engaged in fieldwork within the hospital. When the outbreak was announced, all employees and managers in the surgery and medical departments gathered for an update from the infection control specialists. The event was officially framed as a crisis. It was clearly communicated that the outbreak severely threatened the daily functioning of the hospital. At worst, it would result in a ban on operations and shutdown of complete departments, which meant that no patients could be admitted. However, the specialists' understanding was questioned by some employees. In the plenary session, no specific information was shared about how every hospital department was to operationalise measures to cope with the situation.

The situation was particularly difficult for the surgery unit, where the managerial group met to discuss the next steps. The managers decided on immediate measures with respect to hygiene and strict infection control. They worked out the technicalities that affected the daily operations of the unit, such as washing the ventilation system, possibly closing surgery rooms, building barracks for surgery, prohibiting the wearing of jewellery and wearing new clothes with less particle release. These measures were planned to diminish the danger of contamination. The outbreak threw a department that worked in clockwork fashion into chaos, profoundly changing a system where everything was planned in detail and performed by specialists.

Targeting

Following the joint hospital meeting that framed the situation as a crisis, the managerial group of the surgery unit met. The group was headed by the unit manager, Tor, and the assistant unit manager, Anne. This meeting served as a debriefing and was aimed at outlining the next steps and preparing for the staff meeting on the following day.

Tor: I have to consider quality, which means safety for patients. Quality is paramount. Does anyone disagree?
Anne: Whatever we do, care for the patients must be the priority in this crisis. Not inflicting any danger. Perform quality work, as always. Yet, we also have to think about the employees.

The sequence of the conversation highlights the severity of the situation. The interpretation of the situation as a crisis was confirmed. This unit was faced with the challenge of handling the disruption. The managers displayed commitment to the core values and did not question them. Central to the discussion was identifying the target of the values: patients or clients. This was the starting point for deciding the measures to be taken. The unit manager believed that the patients were the target and that the employees should adjust. This, in turn, led to some confronting.

Confronting

The discussion gave rise to some tensions between the managerial group and the professionals. In the following session of the meeting, specific measures were discussed like change of clothes, closing of doors and ensuring less traffic. Some measures were prescribed as vital, while others were optional and a matter of discretion, depending on the framing of the situation. It was evident that the core values were evoked to strengthen the argument for strict measures. Quality and respect for patients trumped other concerns. In the discussions following the outbreak, the issue of new clothes—switching from ordinary green cotton clothing to blue surgical paper clothes—was of particular interest. Blue

clothes were more hygienic but warm and uncomfortable to wear. This indicates a new practice. In their discussion, managers shared some more relevant information: air quality measurements in the surgery rooms had revealed high particulate matter, so measures had to be taken to improve patient safety. Blue clothing was tighter and would reduce the transmission of particles but was highly unpopular among the nurses. The managers decided on a strategy to approach the professionals, since they suspected that this measure would not be appreciated.

The following transcript highlights the conflicts between the management and the employees of the unit. The staff representative was called Hans. Both Tor and Anne wore blue paper clothing. When I made a note of this, Tor replied, 'I do not have to participate in surgery today. A bit symbolic… I want to statue a good example'. In the staff meeting, a nurse asked whether it was acceptable to wear trousers under the blue surgical clothing. The group then discussed different clothing issues.

Tor: We have a crystal clear recommendation, and we must follow it. Clothing is of immediate importance. We must prioritise quality and safety.
Hans: The surgeons, however, sit with open coats. Some anaesthetics even wear jewellery. It is very unhygienic with maintenance work in the corridors.
Tor: We are the ones who must take the lead and set a good example.
Hans: Heat makes the blue surgical clothing melt. It burns easily.
Tor: We must prioritise fire safety. I too am extremely exhausted by the maintenance work.
Hans: What about the nurses who are allergic to the blue clothing?
Tor: No other hospitals have reported any kind of allergic reactions. Now, we are in crisis. We must use blue clothing.
Hans: Two of the nurses were dripping wet because of the blue clothing. This is not justice or respect!
Tor: There is nothing to discuss! This is how we have to do it now!

This discussion between the manager and the staff representative is an example of the use of values as motivation for actions. Tor emphasised quality, arguing for safety and hygiene for the sake of the patients, while Hans defended the rights of the employees. Hans based his argument on the employees' work conditions and challenged the process of how the

decisions were made. Further, he noted that while surgery nurses had to strictly follow the rules, the surgeons and anaesthetics seem to flout them. Finally, he addressed the issue of respect: he noted that the staff did not feel that the manager had approached the situation in a respectful or understanding manner. The above excerpt shows that Tor considered the patients the target of core values, which in turn meant confronting the professionals.

Identifying

Hanne was the unit manager in the medical unit. She met with her assistant, Atle, and a physician. Below is an excerpt of their conversation:

> *Hanne*: I have to protect my staff from this interference. If nurses have to use a disinfecting spray and wash the rooms, there will be no time left for patient care and professional tasks. This is by definition not their job.
> *Atle*: Yes, this means a drop in quality. Such measures prevent us from providing good care. The central hospital management is not very respectful. They don't understand our unit's situation and how the infection affects our work.
> *Physician*: The measures imposed on us are quite out of proportion.

These data challenge the framing of the event as a crisis. This may partly be explained by the nature of the medical unit in which patients were kept for supervision before and after surgery. In their conversation, the core value of justice was evoked by ridiculing the strict demands for washing the walls and floors but not the door. Hanne's strategy was explicitly to protect the professionals. Instead of confronting them, she emphasised on identification with them.

Her position was also evident in the subsequent staff meeting. Hanne wanted to safeguard her staff from 'this interruption of [their] daily business'. In meetings with the infection control team and physicians, she negotiated strongly, and in staff meetings, she did so by undercommunicating the danger. At the staff meeting, Hanne provided very little information, which signalled that the outbreak was not a crisis.

Hanne: Have you all seen the e-mail from the infection advisors? These bacteria cannot fly or jump. They are transmitted physically. So, wash your hands and be meticulous about hygiene—as always.

Atle: You also know about the measures. We are told to work based on values. This situation represents challenges for us. I believe that we should be left in peace to realise and work based on the core values, as we see fit.

Employee: We must respect the new guidelines, right?

Hanne: How do we show justice in a situation when we are full with patients? Values keep up reflections. Yet we cannot abdicate from our core work.

Negotiating

The above sequences reveal strategies for negotiating the fixedness and fluidity of values. These strategies involve both defining the values on a general basis and specifying what practising the value in a new situation means for the actors. In the surgery unit, tensions arose between the two groups of discussion participants: the managerial group and the professionals. Both groups agreed that patient security was of upmost importance, aligning with the core value of *quality*. The managers argued that the professionals, instead of prioritising the patients, were emphasising their own rights in the name of *justice*. Both parties agreed that *respect* was shown to patients but not to employees or managers. The professionals believed that the unit management was loyal towards the hospital management but not towards the employees. In other words, they were disregarding the professional value of collegiality. The target of the core values was thus contested. The managers held differing views about whether the employees or patients were the targets of the core values.

In the medical unit, the two parties were the unit manager and the staff on the one hand and the central management of the hospital, including infection control specialists, on the other. In this unit, the manager identified more clearly with the professionals. She interpreted the infection control measures as an interference to the work of the unit and engaged at length to protect the daily functioning of the unit. Her stance was against that of the hospital management, and she repeatedly

Table 11.2 Managerial values work

Characteristic	Surgery unit	Medical unit
EVENT	Bacteria outbreak in hospital	
FRAMING	Severe crisis to be handled	Undue disruption to be avoided
TARGETING	Patients	Professionals
Confronting	Professionals	Top management
Identifying	Patients and top managements	Professionals
NEGOTIATING		
Quality	Safety for patients	Providing good professional work
Justice	Rights of patients	Rights of employees
Respect	Enforced measures	Regular professional work and routines
OUTCOME		
Example of new practice	New clothing	Strengthen existing hygienic procedures

highlighted the violation of the value discourse by the top management. This indicates that core values were tools of loyalty. She frequently confronted her top managers about practices that were not coherent with the core values. She explained that if those values were to be realised, a higher budget was needed. She also asked for the core values to be changed to avoid 'open hypocrisy'. Table 11.2 summarises the main findings and the central efforts of the two managers. The data also indicate a process with overlapping phases of managerial values work.

Discussion

The research question guiding this study is '*How do managers negotiate core values as fixed and fluid?*' Situated within a values discourse of a hospital, the case study illustrates how managers evoke, interpret and reconstruct core values at a time of sudden change. This case is highly relevant to elucidate the phenomenon in question: managerial values work.

Capturing the Fixed and Fluid Nature of Values

One of the main contributions of this work is how the data display values as both fixed and fluid. This conceptualisation develops Eisenberg (1984, p. 232) who points out that values promote 'unified diversity' because of their ambiguous nature. Core values appear to be a double-edged sword: easy to recapitulate but also to alter. Studying the interpretations of core values in situ showcases their dynamics as values, by nature, extend beyond the particular yet are enacted in specific contexts and situations. They are abstract and theoretical yet leave solid impressions and serve as orienting devices for actions (Van Deth & Scarbrough, 1995). The study findings highlight how values are manifested in an organisation's structure and culture, yet they are also manipulated. Thus, values are simultaneously fixed and fluid.

As expected, both nurse managers demonstrated value consciousness and identified the value discourse as the central driver of their actions in a critical situation. A key difference, however, was the issue of targeting. The middle managers were unsure if they had to be loyal to the top management or the employees, and to the hospital or their own unit. Both managers experienced a mismatch between the core values and the observed practices. They engaged and risked conflicts to avoid this discrepancy between values and practices. This involvement reflects their commitment to the core values as they felt deeply responsible for shaping the practices accordingly. Thus, the observations in this study reveal how the boundaries between values blur.

The phases of framing, targeting, and negotiating show how values are fundamentally imprecise and open to various interpretations in different contexts. On the one hand, a fixed set of core values was recognised in the research context; however, on the other hand, this set was fluid due to its embeddedness in the flux of events. This was evident in the case where the two middle managers channelled information differently. The surgery unit manager was very direct and did not initiate talks; instead, he argued for certain measures. The medical unit manager held back information from her employees and downplayed the heated debates during the managerial meetings. Through their rhetorical efforts—or lack thereof—they

prioritised the infection event differently. In the surgery unit, the discussions were dramatic, but in the medical unit, the measures were ridiculed and not considered *worth* fussing over. This indicates that in the medical unit, the core values were not employed to promote the infection control measures. On the contrary, arguing from the perspective quality, the unit was in favour of letting professionals do their work.

The Elasticity of Values

A second contribution of this work is the conceptualisation of value elasticity. This notion is inspired by the notion of value ambiguity and develops the conceptualisation of the fixed and fluid nature of values. Values are observed to be ambiguous and transfer the responsibility of the 'right' interpretation on to the participating actors (Eisenberg, 1984; Gehman et al., 2013). Not only did I observe the presence of value clarity and unclarity, but I also outlined the process of how actors strategically employ values in their work. The present study provides empirical material and a broader conceptualisation on how elasticity is evident in managerial work. Not only are values open for interpretation, they are subject for negotiating and the interests of actors. This approach to values is more strategic and represents a deliberate way of employing values as tools and means to an end. The focus is thus on achieving something. This points towards the 'hard' aspects of values, suggestive of power and even manipulation.

The benefit of studying a given set of values is that the conceptual dimension of values remains stable. It also reveals conceptual stretching and what actors believe falls within the boundaries of a value definition. A helpful metaphor is the idea of contracting and expanding, suggested by Edmonton and Cha (2006).

The data in this study point to mechanisms that trigger processes with an observable outcome or new practices. Value elasticity refers to the fixed and fluid dynamics of values, in the sense that a value cannot be fully defined. Value elasticity is an inherent characteristic of values—detectable when values are negotiated. It surfaces in conceptual stretching, which entails both expanding—widening the held notion of what

a value covers—and contracting, which is limiting its contents. Unlike rules, values do not come with fixed meanings for any situation, even if the situation is a crisis. The findings of the study serve to correct to the misconception that values act as a unifying force in the midst of a basic disruption. Thus, this study extends the research of Gehman et al. (2013) and reveals new insights about values work in situations of change and crisis. Values have been understood to create unity (Selznick, 1957), but this study shows that this is not always the case. Crises and sudden changes are opportunities for managers to perform strategic values work that is guided by their interests. Rules are not enough; values need to be re-negotiated when the situation demands it.

The Shortcomings of Core Values

A third contribution of this work concerns the shortcomings of core values on a general level. Core values signal that the organisation is coherent and united because the values guide activities towards shared goals (Wæraas, 2018). Interestingly, all the actors in the case study reiterated the key organisational discourse in the hospital, namely its core values, which appear to hold a sacrosanct position. However, the case study points to the drawbacks of research conducted on fixed sets of values (Cameron et al., 2014) rather than lived values. Even if the 'set-approaches' offer analytical clarity, they may be too static and ideal typical. For example, official statements from the hospital offer value clarity by expressing explicit intentions and standards for actions across situations. These values are the outcome of processes that have been bottom-up, yet they are still values for practice and not necessarily values in practice.

Values and practices are connected, but this work shows that it is naïve to assume consistency between them. The present study questions this assumption by facilitating in-depth insights into a neglected dimension of values through the concept of value elasticity. Whereas fixed core values imply institutionalisation, I explore how their fluid nature emerges in heated discussions. The case shows how interpretations are fluid and are applied to push the interests of the actors. The findings illustrate

how core values may be undermined and even manipulated. Thus, this chapter provides a critical perspective on values that emphasises their 'darker' side instead of their positive effects (Schein, 2010).

A key objective for this chapter is to investigate if and how core values are part of an ongoing negotiation. I argue that values are not necessarily fixed, even if the core values are well formulated. Rather, actors employ them in dynamic interplay and ongoing interpretations—and the same values may have different meanings for different people. This study has implications for the notions of core values in a theoretical sense, and it provides empirical evidence on how values manifest in managerial practices. This study shows that managers use value elasticity to bring about change. Through the processes of negotiating they explore meanings that lead to new practices. By their efforts, they link organisational continuity with contextual and adaptive change.

The case describes a process from event to outcome containing three parallel micro-processes: framing, targeting and negotiating. On the basis of the contextual findings displayed in Table 11.1, I visualise theoretical contributions in Fig. 11.1. Value elasticity is constituted and evident throughout this process and not only as an outcome.

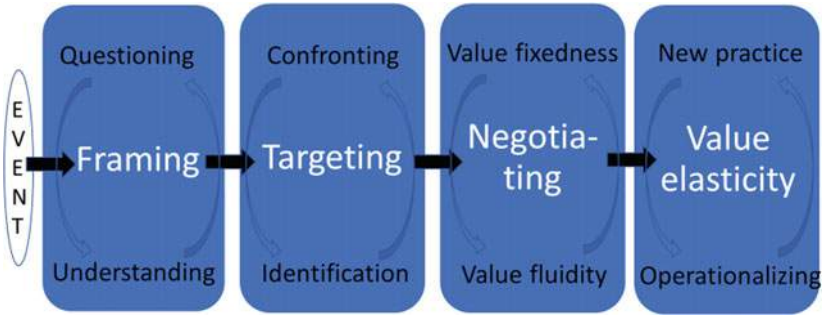

Fig. 11.1 Elasticity in managerial values work

Concluding Remarks

This study illustrates how values are devices of orientation that express intentions and guide actions in managerial work. I have empirically demonstrated how core values constitute both unity and diversity. The 'unified diversity' is due to the inherent ambiguity of values. I have developed this notion into a new conceptualisation by proposing values as fixed and fluid; the phenomenon of value elasticity. My findings illustrate how managers perform values work, seeking to align or justify their practices with the core values. In the managerial discussions, some values were evoked and used explicitly to argue for a practice consonant with the managerial strategy. These everyday evocations of the same values are not abstract. Rather, values are used to implicate specific ends and particular actions to be taken.

The chapter shows how values may surface especially in controversies and conflicts. I have provided data on how a value discourse is evoked, presented and represented. Further, I have proposed the construct of value elasticity and a model that visualises it. Values may be identified as priorities, worth, centrality and drivers for actions. In dilemmas, they are evoked and explicated more than in situations where the course of action is clear. The ambiguity provides scope for negotiating values.

Values work is a space of contestation when it comes to the interpretations drawn and the concrete consequences that a given value may imply in a particular case. Core values are open to dialectic claims and ongoing tensions. Discursive practices support this characteristic by showing the elastic properties in processual ways, in which values are negotiated and lead to divergent configurations of practices.

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12

Work on Values When Shaping Public Institutions: "What's Trust Got to Do with It?"—Experiences from Scandinavia

Benedicte Tveter Kivle

Introduction

In this chapter, I elaborate on trust as a value in the public sector and how it is worked upon while structuring Scandinavian public organisations. Based on textual analysis of articles in three national popular scientific journals in the Scandinavian countries during the last decade (2007–2019), I propose patterns for values work in the shaping and reshaping of public structures.

Good governance, that is finding the best structures for public organisations, is constantly questioned and discussed by politicians, academics, bureaucrats, 'think tanks', labour unions and others who have an interest in this issue (Bozeman, 2007; Garofalo, 2011; Jørgensen & Sørensen, 2012). The understanding of values in this debate is important, because values and structures are intimately connected. Institutional theorists argue that (public) institutions are (public) organisations *infused* with

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values (Garofalo, 2011; Selznick, 1957; Van Deth & Scarbrough, 1998). But values are not only carried out or enacted by individual leaders or collective actors, as Selznick proposed more than 60 years ago (Scott, 1981; Selznick, 1957). They are also carried out through the choices done behind specific formal structures are materialised values, and the choices of formal rules, goals, the division of labour and the hierarchy of responsibility and power are (always) based on values (Kaarbø, 2017; Scott, 1981). Some values may be treated as 'God-given'. For example, the value 'efficiency' or slogans like 'more health for every penny' might give the impression that cost-efficient structures are neutral and rational, when in fact, they are highly normative. Hence, values work is taking place within the shaping of formal structures and should be possible to detect. Values work in these shaping processes has to little degree been studied before. This is exactly what I do in my text analysis.

The Value of Trust in Public Institutions

With initiatives for trust-based management (TBM) in public organisations, the value of trust is explicitly promoted and materialised in management and structures (Nyhan, 2000). In Scandinavia, starting around 2005 in Denmark, TBM was introduced as a public governance model, with 'trust' as the first keyword, followed by 'trust model', 'trust reform' and 'trust delegation' (Bentzen, 2016; Kuvaas, 2017; Preisler, 2016). TBM in the public sector is an operationalisation of steering paradigms like new public governance and public values management (Garofalo, 2011; Ocasio, 2008), based on principles from these frameworks. After decades of heavy reliance on private market-inspired New Public Management (NPM) models and reforms, these alternatives to organising the public sector in Scandinavia have reached the arenas of political decision (Garofalo, 2011). In this way, trust-based initiatives both challenge existing dominant values and priorities and propose specific practical solutions.

Values are normative conceptions of the desirable, values are not directly observable, but are evident in moral discourse (Van Deth & Scarbrough, 1998). Values are materialised through practices, though they

are often perceived as values only after a practice has been instituted (Aadland, 2010). Values are not constant entities. For example, love, respect and efficiency are desirable but are interpreted and expressed differently according to their contexts at any given time (Espedal, 2019). In this book, we explore how values are worked on within institutional contexts, claiming that values are deliberately ambiguous and that they must remain ambiguous to maintain their relevance across contextual settings.

Like any value, trust is ambiguous and complex (Khodyakov, 2007). Trust is both reflexive and intuitive, conceptualised as strategic, symbolic, relational and institutional (Aadland, 2010; Julsrud, 2018). It can generally be defined as 'a psychological state comprising the intention to accept vulnerability based upon positive expectations of the intentions or behaviour of another' (Rousseau, Sitkin, Burt, & Camerer, 1998). This psychological state of positive expectations is most often desired and valued. A general trust, also called horizontal trust, is a precondition to acting socially (Giddens, 1984). In fact, theorists will argue that it is not possible to act without relying on positive actions from the surroundings (Julsrud, 2018). Distrust and scepticism, on the other hand, are seen as an intention to accept no vulnerability, basing every action on negative expectations of the intentions or behaviour of others; this is something few would find desirable in its purest form. A balance between naïve expectancy and suspicion is often viewed as the most realistic approach to social settings (Giddens, 1984).

Trust in institutions is distinguished from interpersonal trust, although the two are closely linked (Fukuyama, 1995). Trust *in* public organisations involves holding positive expectations towards public systems (Bozeman, 2007). Trust *within* public organisations is also associated with positive interpersonal expectations of other actors within the structures. Hence, trust in the context of public organisations includes the development of trustworthy extra- and intra-organisational relationships (Khodyakov, 2007). This complexity is also found in the TBM models.

The public sector depends on trust to function optimally (Bozeman, 2007; Fukuyama, 1995). Values in public organisations are principles which must be followed or standards which must be met by public organisations while they regulate or produce services. The public ethos is

a moral basis of values such as professional independence, accountability, transparency and security under the law. All these values are based on the assumptions that government is in pursuit of the public interest (Bozeman, 2007; Byrkjeflot & Engelstad, 2018; Jørgensen & Sørensen, 2012). Hence, public trust is connected to the people's positive expectations of intentions or behaviour by public systems and the people representing these systems (Rousseau et al., 1998). However, which values that dominate in public institutions at any given time are changeable. This valuation is, rather, a dynamic movement among the architects, the stakeholders and the decision-makers within the public sector, placing more or less emphasis on values across time and space (Jørgensen & Sørensen, 2012).

According to research and international ratings, Scandinavian societies are among the most trusting societies in the world, due to historically stable rule (Andersen, 2018), well-functioning public institutions (Rothstein, 2013), high social capital and strong civil societies (Fukuyama, 1995; Putnam, 2001). When trust is reintroduced as a value in shaping public management (Nyhan, 2000), this occurs in an already trusting environment, though some stakeholders, as we shall see in the examined material, fear that trust is decreasing in the Scandinavian societies.

The Context: Models and Reforms on Trust in Scandinavia

The value of trust has been materialised through the implementation of TBM in different forms in all three Scandinavian countries during the last decade (Preisler, 2016; Trust-Delegation, 2018). Trust as a managerial value in governmental institutions was reintroduced as part of the solution for reshaping the public sector (Bentzen, 2016; Nyhan, 2000). Although local contexts may provide a variety of facets, certain overall characteristics characterise TBM.

TBM concerns both interpersonal trust among organisational actors and formal structures which can enable, or at least not counteract, trustworthy relationships. TBM aims at giving space to employees to take on

the responsibility for and control over tasks in their own work situations (Nyhan, 2000). Following the principles of transformational leadership, rather than attempting to raise efficiency through control and incentives, the focus is on performance based on agreements and a high level of trust between the parties concerned (Bass, 1990; Jensen & Svendsen, 2014; Julsrud, 2018). Employees are assumed to be experts in their own fields; they have special knowledge of all aspects of their working situations and processes and have a vested interest in optimising them. By seeking the employees' input and advice and by rewarding good ideas, managers harvest this invaluable resource pool. The reasoning is that if the employee has experienced to be a positive impact at her workplace, it heightens her sense of pride and co-ownership and encourages her to take on even greater responsibility (Jensen, 2014; Kuvaas, 2017). As Jensen (2014) remarks, 'When employees are encouraged to offer input and suggestions, and it is safe for them to speak their minds and even to make mistakes, a distrustful, heavy-control, "zero-defect" culture is avoided'. TBM is made possible by administrative systems, such as incentive systems and expedient control, systems that embody positive expectations from (most) co-workers. Professional co-workers do not oppose control as such; thus, they often request control systems which provide predictability and stability in their work. But the control must enable the professionals and not hinder them from doing their job.

Different models of TBM and trust-based managerial structures have been introduced into the public sector in Scandinavia. For example, such principles were put into practice in the municipalities of Helsingborg (2007) and Copenhagen (2009), and through an agreement between the Danish government and the biggest unions in the country (FTF, AC and OAC), seven principles of good public management were signed in 2013 (Preisler, 2016). The seven principles were as follows (author's translation):

(1) Management of the public sector shall focus on overall purposes, goals and results;
(2) Dialogue, openness and clear goals shall be the basis of task solutions;
(3) Leadership and management shall manifest and consider trust and responsibility;

(4) Development and the professional freedom to act shall be based on well-documented knowledge;
(5) Tasks shall be solved based on knowledge about what works;
(6) Leadership and engagement shall promote innovation; and
(7) Public services shall actively draw on citizens' own resources.

In Sweden, the so-called Trust Delegation was appointed by the government in 2016 (Trust-Delegation, 2018). They conducted research and projects for the purpose of collecting knowledge about trust in the public sector. Their final report will be presented at the end of 2019. In Norway, the trust model was politically introduced for the Oslo municipality in 2017 through a social democratic political statement emphasising trust and openness and the reduction of detailed control mechanisms (Johansen, 2017).

Overall, TBM structures seek to strengthen trustworthy extra- and intra-organisational relationships: trust between the citizens and public organisations, between managers and employees within public organisations, and among subgroups and departments within the organisations (Bentzen, 2016; Khodyakov, 2007).

However, promoters of TBM meet resistance from external as well as internal actors. The realism in basing management and administration on trust is questioned. Bureaucrats and professionals working in public sector may find it insulting when politicians insinuate that public sector needs more trust. Many insiders working in the sector experience and practice trust every day, so why would they need a trust-reform? In this context of dispute and confrontation about shaping the managerial structures of public sector, the value of trust is worked upon.

Trust is discussed, promoted or denigrated by stakeholders, analysts and decision-makers while they discuss the shape of structures in public sector. The examined material gives insight into how stakeholders work on trust in different and sometimes conflicting ways. I see trust being dealt with through defined mechanisms of values work (Gehman, Treviño, & Garud, 2013) and draw patterns of the competing processes of values work (Jackall, 1988; Thornton, 2012). In this way, I highlight values work in the shaping of structures, and not only in the culture, within organisations.

Theoretical Perspectives: Values Work and Institutional Logic

The work on values is operationalised into four mechanisms (Gehman et al., 2013). The four mechanisms of values work are described as (1) pockets of concern, (2) knotting of concerns into networks, (3) performing value practice, and (4) circulating values (Gehman et al., 2013). Inspired by practice theories, Gehman et al. based their model on empirical data from a vast range of actions and decisions taking place over a period of almost a decade. The researchers observed how actors changed an unwanted dishonest business college culture into a culture based on honesty and honour. The authors stated that values practices are observable and processual and unfold within time and space (Gehman et al., 2013). In a similar way, work on values is understood as 'sayings and doings in organizations that articulate and accomplish the desirable in relevance to right and wrong action and behaviour' (Espedal, 2019).

Values work starts with the unstructured and loosely linked identification of concerns, the 'pockets of concern'. These are constructed into patterns, connecting the pockets together in wider networks of keypersons, named by Gehman and colleagues as 'knotting of concerns'. Generators for knotting concerns could involve formal meetings or informal talks. I presuppose that generators for knotting concerns could also involve discussions going on in newspapers and journals; arenas where keypersons can present concerns of distrust and promote new trust practices. The knotting enables the formulation of new value practices and eventually 'ends' in new patterns of value practices. When values are practised in specific contexts, they are confronted by practical possibilities or practical obstacles, such as competing value practices (Gehman et al., 2013).

Underneath this movement from isolated concerns into new patterns and practices, the semiotic tools for communicating values are present. In the circulation of values, a value practice is addressed and legitimised by metaphors, signs and symbols, implicitly representing frameworks of institutional logics. Elements from logics are identified in practices and texts through, among others, the use of root metaphors, symbols and signs (Fairclough, 2007; Ocasio, 2008; Thornton, 2012). In values

work, these semiotic elements merge the framework of institutional logics and the circulation of values (Gehman et al., 2013). Metaphors, symbols and signs are known to text analytics and are tools for values work, and they aid value transfer across contexts (Fairclough, 2007; Vieira & de Queiroz, 2017). Changes and stabilities within institutions may be understood with respect to the dynamics among different institutional logics (Lawrence & Suddaby, 2006; Sirris, 2019; Thornton, 2012). Contradicting institutional logics pinpoints the fact that the same value can be (and often is) interpreted and handled differently by different actors (Ocasio, 2008). In my study, values work, and the mechanisms of concern, values practice and value circulation are explored further.

Research Setting and Method

Research Setting

The empirical material for this qualitative textual analysis includes three popular scientific journals on public governance, situated in Norway, Sweden and Denmark. The contributors/text authors are academics, analysts, bureaucrats and journalists as well as stakeholders and decision-makers in and around the public sector who present information, opinions and meanings with respect to the management and administration of the public sector. The journals have some definitional power to decide what is relevant and what is irrelevant in the pursuit of achieving 'good governance' and well-functioning public organisations (Bourdieu, 1994). The journals in themselves are arenas for keypersons to knot clusters of concerns (mechanism 2 in Gehman's model). While forming the texts, contributors also knot their concerns, making sense of the situation.

One popular scientific journal from each Scandinavian country was strategically chosen. In Norway, the journal *Stat og styring*, or *State and Governance,* was chosen, while in Denmark, the digital journal *Denoffentlige.dk*, or *The Public*, and in Sweden, the digital version of *Dagens samhälle*, or *Today's Society,* were chosen. All three journals were chosen because of their relevance in the discussions on public administration. The search terms 'tillit/tillid' and/or 'kontroll' (trust and/or control) on

the webpages of the journals returned a substantial number of popular scientific articles and comments about TBM, altogether 101 articles, about 420 pages. The national contexts and the differences between the journals notably influence the variety of perspectives on the topics. Different concerns are given more emphasis within the different journals. For example, there is an overall emphasis on the managerial role in the Swedish journal, while in the Danish and Norwegian journals, there is more emphasis on the structures of performance management. The Danish contributions show, overall, a more direct scepticism towards NPM.

All three journals are popular scientific magazines, presenting a variety of texts in the feature genre and in the academic analytical genre. All three are arenas for discussions on public management and leadership. Danish contributions constitute twice those of the Norwegian and Swedish. The Danish journal had 54 articles on trust, while the Norwegian journal had 25 and the Swedish 22 relevant articles. This might perhaps be because the Danish are in the forefront of these debates on trust-based management. In Norway, there is a preponderance of editorial articles, while in Denmark, there are mostly academic comments, and in Sweden, there is a majority of political articles (Figs. 12.1, 12.2, and 12.3). There may be national differences as to what milieus are most dominant in the discussions on TBM. But the national differences between the texts are overshadowed by similarities across the national contexts. Many contributors refer to the other countries in their texts

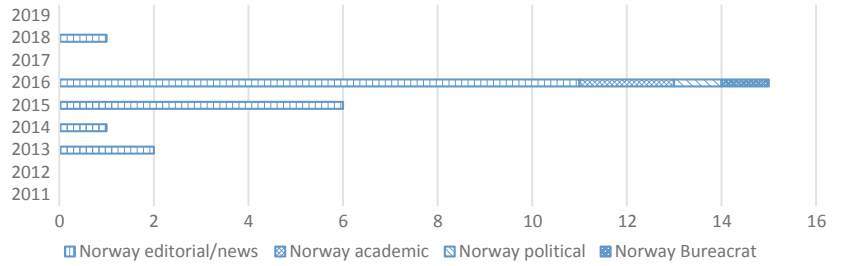

Fig. 12.1 Norway: Number of articles on trust devided in published year and type of article

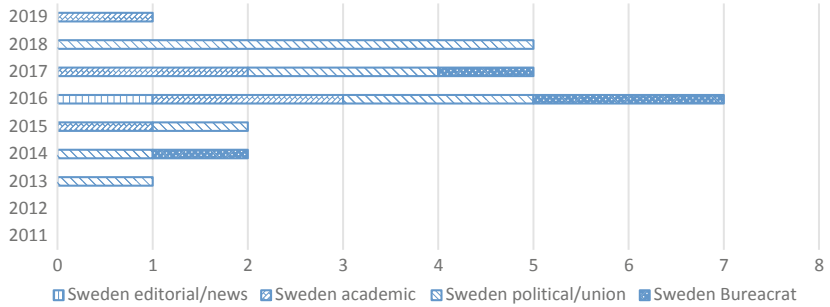

Fig. 12.2 Sweden: Number of articles on trust devided in published year and type of article

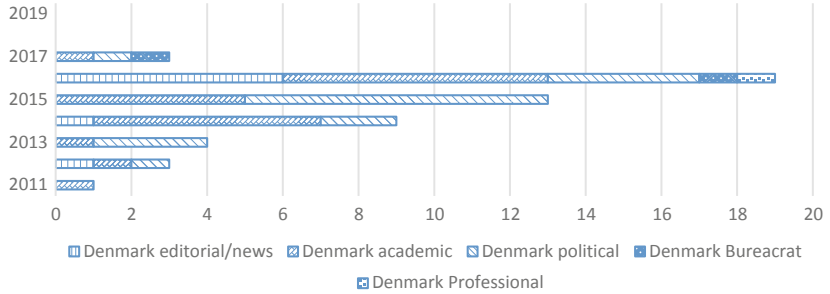

Fig. 12.3 Denmark: Number of articles on trust devided in published year and type of article

and look to each other across borders. So the differences are not taken into consideration to any great extent in the textual analysis.[1]

Textual Analysis

Textual analysis was conducted on the 101 articles, using the hermeneutical principles of circular movement between subjective and objective particulars and wholeness (Lockyer, 2008; Vieira & de Queiroz, 2017). Following a qualitative content analysis approach, coding and categorisation

[1]I have translated all quotes from the texts as scrupulously as possible, from Danish, Swedish and Norwegian to English.

were applied, aided by the four mechanisms of values work. This interpretative sense-making resulted in illustrative examples and a nuancing of the four mechanisms (Gehman et al., 2013). To provide an overview of the different contributions, I categorised and characterised the texts according to country, occupation/position of contributor and year of publishing (Figs. 12.1, 12.2, and 12.3). From this overview, I manually performed an analysis on all the texts. This was time-consuming, but it provided a good insight into the texts. I hermeneutically found patterns and controversies from citations and categories, disputing and confirming theoretical mechanisms of values work and institutional logics.

Textual analysis does not attempt to identify the 'correct' interpretation of a text but is used to identify which interpretations are possible and likely (Lockyer, 2008). Textual analysis of popular scientific journals provides information about central influencers' deliberate attempts to make their opinions and situational analysis heard. The clear, well-formulated texts give us a peek into the authors' thought-through world view and identity and, I presuppose, a difference in underlining institutional logical rationales. The texts do, in this way, illuminate interesting mechanisms of values work and competing institutional logics, even though the material lack data on the informal day-to-day work.

Findings

The 101 articles were published within a range of eight years, from 2011 to 2019 (Figs. 12.1, 12.2, and 12.3). The peak in 2016 correlates with political initiatives for TBM in Oslo and Sweden. In Denmark, the first PhD on TBM was also published at this time (Bentzen, 2016). Contributors were either academics or bureaucrats either on a local or a central level, many were journalists with an academic education, and some represented political think tanks, adding political colour to their arguments. Most of the authors (95/101) promoted the idea of TBM in the public sector. The six contributors who did question the models proposed were therefore given extra attention, to elaborate on alternative perspectives on trust.

Values Work Mechanisms

The texts mirror the four mechanisms in Gehman's model (Gehman et al., 2013). The lack of trust is identified in malpractices and dysfunctional systems in public organisations (mechanism 1). The concerns regarding distrust are ordered by stakeholder according to overreaching descriptions of the root causes of malpractice. Some contributors turn from describing the challenges to suggesting new practices within public organisations, built on trust, preferably models of TBM. They point to possible positive outcomes of these practices. Other articles deal with possible obstacles associated with the TBM-models (mechanism 3). To various degrees, the authors utilise semiotic tools to underline images of trust in public organisations. The use of semiotic tools aids circulation of the discourse on trust (mechanism 4). Hence, the mechanisms of values work are evidently present, traceable through the texts.

There are also examples of texts which contradict a homogenous process of values work. Even if one agrees with some of the concerns, there is ambiguity among the stakeholders concerning what are seen as causes of the observed dysfunctions and distrust. Concerns about distrust are disputed and questioned. The contributors also differ with respect to what practical implications the concerns on trust should have. Below, I present how promoters of TBM and critics towards TBM, describe their attitude towards (lack of) trust in public institutions, as well as their contradicting views on possibilities lying in new and old value practices.

Pockets of Concern and Competing Understandings of Root Causes

The texts show how descriptions of concerns substantially differ. The differences continue when the stakeholders present the stated concerns into wider understandings of the root causes of malpractice and distrust.

Many texts point to concerns about a lack of trust, reflecting the fact that values work, besides seeking the 'good', also involves avoiding the 'bad' (Gehman et al., 2013). While Gehman et al. point to dishonest

practices in a business school, for example cheating on exams, my material shows numerous examples of distrust in what is described as a dysfunctional public sector. One Danish editor-in-chief expresses his concern this way; 'It is hard to be employed in a system which has erased all trust from the citizen and the abilities of the coworker. (…) It enforces powerlessness, and powerlessness enforces rejection'. Many of the examples themselves refer to examples of systematic distrust and overexaggerated control.

Trust and distrust are explicitly mentioned or implicitly implied through associated concepts, such as a lack of cooperation and communication or badly performed services. Professionals show concern about how people are treated in public services, and some express how residents in an elderly home, for example, are treated as 'milk that has gone bad'. The professionals are concerned about the relation between professionals and the receivers of public services. The description of systematic misconduct underlines the need to strengthen trust through the way in which public organisations are organised.

But there are those who contradict the image of crisis and distrust in the public sector. Pointing to surveys among citizens and managers, researchers propose a more positive picture. One professor from Norway sums up findings from a large international survey in 2013, stating: 'we have no crisis in Norway, Top managers are satisfied, co-workers are satisfied, and citizens seem to be quite satisfied'. So compared to other countries in Europe, the citizens of Nordic countries still express a high level of trust towards public sector. This point is promoted by some academics and politicians in the texts, stating that there is no need for more trust in public sector.

Root causes of the observed malpractice and distrust are either described as exaggerated bureaucratic control mechanisms, failures in the capitalist system in the public sector or faults in the political decision-making systems. Researchers express the importance of seeing misconduct as systematic problems and not as individuals' responsibilities: 'The reforms and documentation requirements produce distrust and are the seed of the whole misery' (Norwegian academic). Hence, the blame of

distrust is given to the practice of overwhelming documentation requirements. Bureaucratic mechanisms are closely linked to political decision-making, where the need to fight errors leads politicians to impose more detailed control. The need for action results in ineffective cumbersome procedures which 'slow down the daily work without the work being faultless for that reason' (Norwegian left-wing think-tank).

Promoters of the TBM blame the NPM principles themselves for the distrust, stating that quality contradicts the external reward-mechanisms of the market-logic; 'Quality, long-term durability takes time. (…) It is freedom rather than reward that makes us creative at work'. Others, however, see the malpractice as a perversion of NPM principles. Defending the market-logic of NPM, they see the malpractice as 'a result of goal management and performance measurement being implemented in a bureaucratic context, where the only response to poor performance is more rules and more metrics of compliance' (Danish academic). The bureaucracy is to blame and not the business principles of NPM.

Others, again, raise their voices to defend the existing bureaucratic system, and state that bureaucratic control is necessary to secure trust. 'Here is a paradox; we are the public. We have a contract with citizens about equality and predictable, continuous behaviour. (…) It is a contract that secures trust and a civilized society – and at the same time makes innovation difficult for us' (Danish bureaucrat).

Practising Trust, Possibilities and Obstacles

TBM is promoted or disputed as value practices of trust. While Gehman et al. describe resistance, enrolment and adjustment of the honour code, the suggested practices of TBM are dealt with in similar manners in the examined texts. Promoters of TBM emphasize different possibilities that lie within the trust-based structures. The 'added value of management by trust' is promoted to be 'partly savings from eliminating the monitoring of coworkers' actions and partly the increase in the organization's social capital' (Danish academic). The decrease in exaggerated control builds social capital, understood as interpersonal trust. When local institutions and co-workers are managed and controlled based on a basic confidence

in co-workers, 'communication and cooperation in the organization will improve, the costs of control will decrease and space will be given for professionalism, eliminating the zero-defect culture that kills innovative initiatives' (Danish academic).

While some promoters emphasise the decrease in bureaucratic control specifically, others emphasise the underlying paradigm shift the reshaping of public structures include. 'The trust reform is about creating a greater connection in work close to the citizen and about solving tasks in as decentralized a way as possible. It is a paradigm shift' (Danish think tank analyst). TBM promoters see a positive spiral, where trust and results strengthen each other. Practitioners equate practising trust in public organisations with making room for individual professional discretion. 'Steering and managing more based on trust in employee competencies, professionalism and commitment will increase motivation while providing the necessary frontline space to unleash innovative potential' (Swedish professional). Trust is also associated with openness and freedom of speech: 'The trust reform presupposes – unarticulated – a work culture where management is open to criticism and where employees can speak freely' (Danish academic).

Some of the texts' authors do, however, uphold resistance towards the proposed new practices. Sceptics of the TBM models and defenders of existing systems of goal management claim, for example, that replacing control with trust is naïve and unrealistic. Rather, they defend the existing system as the best available option of public systems. They challenge the critics to come up with a realistic alternative. 'What (do) the critics of goal management really think are realistic alternatives for central administration. The road through a legitimate structural administrative context is demanding, but it exists' (Norwegian bureaucrat). In this way, the structural practice of trust is given resistance.

Circulating Trust

Trust seldom appears in an isolated way. Rather, it is given meaning through a semantic context. Images of trust, the surrounding concepts, give us mental constructions for sense-making to allow us to understand

trust in public management and structures. I found metaphors and the use of key concepts which aided different understandings of trust.

Metaphors illustrating public sector are primarily used by promoters of TBM to demonstrate their concerns about existing systems. Trust is by these stakeholders seen as a promoter for purposeful work, indicating a community-logic: 'Two people were asked about their similar work. The one answered, "I carry rocks", and the other answered "I build a cathedral"'. Followed by the statement, 'Without map and compass, you easily get lost'. A Swedish analyst makes this point to oppose a bureaucratic control-motivated structure.

Traces of a marked logic can also be observed through phrases such as 'protecting the consumer' from ill-treatment through control and documentation (Swedish liberal think-tank). Critics of the market logic, however, illustrate their concern through metaphors of a market: 'Welfare and services are placed on shelves in a supermarket where the customer passes through with a shopping basket' (Danish social democratic think tank). The misfit combination of supermarket and welfare serves to underline the need for a structural and paradigm shift.

The different actors' identities, built over time, are linked to their general perception of reality. For instance, for a promoter of the market logic, attempts simplify public structures to reduce the number of rules and process requirements is interpreted as 'an attempt to bring the NPM back to the original track of decentralized management' (Danish academic promoter of NPM).

Discussion

So, how do we know that these findings are traces of values work? The concept of values work comes from a practice perspective, based on substantial empirical research. Can I claim to find something similar through a simple textual analysis? The findings have their clear limits. However, the journal texts clearly show traces of the mechanisms in values work. I would even suggest that the arena for discussing public organisation in

journals like these are arenas for knotting concerns, strengthening networks of promoters of trust-based practices in public sector (Gehman et al., 2013).

The discussions on trust may be viewed as mere examples of promotion of and resistance to change, or they may (also) be viewed as traces of competing underlying assumptions. Competing value systems, or institutional logics, place trust in different contexts, giving different meanings to a value (Ocasio, 2008). Four logics were traceable in the texts: market-, bureaucratic-, professional- and community-logic (Ife, 1997). Trust is promoted in different ways by the different logics. As Gehman quotes: 'It's like apple pie. Who could be against it?' (Gehman et al., 2013). The disagreements are rather about whether there is a crisis of trust and whether it is necessary to overturn the public structure to maintain and increase trust. The situational concerns and the practical implications differ among the institutional logics. Contributors dispute whether trust is under pressure in public organisations, whether trust is secured through bureaucratic procedures which strengthen predictability, whether trust is executed through more space to perform professional tasks, or whether the best solution is to let free market-mechanisms from bureaucratic control. Hence, the work on trust happens on the arenas for discussing not only public sector culture, but also public sector structure, and it seems to happen within this landscape of competing institutional logics.

Conclusion

My empirical findings confirm the core argument in this book, which is that values are flexible entities and that they must remain flexible and ambiguous, so they can maintain their relevance across time and space (Espedal, 2019; Sirris, 2019). When the sense-making of trust becomes too specific, the value turns into a normative injunction and will be instantly disputed. Actors framing their understanding within different logics may agree that trust is a desirable value, but it is when trust is given situational contents that differences appear.

Further empirical investigations could provide more insights into how values work and how institutional logics influence each other. Further

studies could also investigate the relative power dimensions between these logics, along with theories on paradigm shifts. How is one dominant logic position conquered by another? Gehman et al. do have great strengths in their substantial descriptions of changes in value practices (Gehman et al., 2013). My study contributes to the developed understanding of how trust as value heterogeneously is worked upon through the mechanisms of values work; shaping, reshaping and discussing concerns towards and changes within structures of public organisations.

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13

The Art of Making Sense of Volunteering

Johan von Essen

Introduction

The chapters in this anthology explore different aspects of how values work within organisations to structure individual behaviour in everyday life. The present chapter will contribute to this endeavour by studying how values related to the volunteer experience are used to construct identities of engaged citizens in contemporary Swedish society.

In research on volunteering, there is a vital interest in values since persons engaged in volunteer work are expected to embrace pro-social values. Thus, values are often studied as antecedents to volunteering since they are supposed to cause action. This is of interest for scholars and policy-makers since volunteering is expected to deliver desirable outcomes such as welfare services, trust, deliberative democracy and empowerment.

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To a lesser extent have scholars been interested in the volunteer experience, how volunteering is constructed, how it transforms people's perceptions of themselves and society, and what their engagement means to them (Wilson, 2012). How the social construct of volunteering is maintained by scholars and policy-makers to make it into a legitimate and significant object of scholarly enquiry is previously studied (Sachar, von Essen, & Hustinx, 2019). This chapter studies how values related to the volunteer experience are used by individuals to construct and disclose their identities. Here, values are not discussed as causes of actions; instead, how values are used to constitute the identity of the actor is studied. By taking the relation between values and actions in this reverse order, the aim is to contribute to the research on values by studying how values may be used in constituting and disclosing the identity of an individual.

Agents, Values and Identity

Values are often treated as normative opinions on desirable behaviours, objectives and ideals that individuals or organisations have to guide practices (see introduction by Askeland, Espedal, Jelstad Løvaas and Sirris). This perspective on values and actions and how values relate to institutions is studied in several chapters in this volume. A reversed perspective on values work will be explored in the present chapter by using some ideas on human agency suggested by Charles Taylor. At the heart of Taylor's philosophical anthropology is the notion that the values of an agent are not only used in discrete evaluations of possible alternatives to guide action, they also constitute the quality of the actor. By evaluating a normative significant situation leading to the preference of one alternative over another, a human agent discloses the kind of person she wants to be, so that identity is defined by the agent's evaluations (see also Jelstad Løvaas and Bruland Vråle for the significance of values for identity work).

In this respect, Taylor refers to 'strong evaluation', which is an evaluation of a normative significant situation where possible alternatives are logically related so that they get their meaning in relation to each other.

Strong evaluations are made within a language of evaluative distinctions where alternatives are characterised contrastively so that competing alternatives can only be understood in relation to one other. For instance, the decision to help someone is due to an evaluation of a situation where the agent values altruism instead of egoism, and the meanings of altruism and egoism are dependent on each other. To reflexively evaluate different alternatives demands a vocabulary of worth that comprises contrasting alternatives where the superiority of one alternative over another can be expressed (Taylor, 1985, p. 24).

According to Taylor, this implies that when individuals talk about their actions and prefer one alternative over another the alternatives are parts of an evaluative horizon (Taylor, 1991) which situates them in a social context so that acting in one way discloses the kind of person the human agent wants to be. The notion of identity refers to essential evaluations because they are the indispensable horizon based on which individuals reflect and evaluate as persons (Taylor, 1985, p. 35).

Since values get their meaning in contrast to other values, individuals may disclose their identities in contrast to other lifestyles, in particular when deviating from dominant or taken-for-granted norms, which makes it necessary to defend the identity. This implies that values are contextual as they may be reactions against a prevailing social order (see also chapter by Askeland). By deviating from social norms or traditions, one can appear as a person in society (cf. Hustinx, 2003; Wuthnow, 1991).

By the term "identity", Tayler does not refer to decontextualised physical or psychological traits. Instead, identity is used in the same sense as when "we talk about 'finding one's identity', or going through an 'identity crisis'" (Taylor, 1985, p. 34). Thus, identity is self-reflexive and socially dependent; it is the sense one has of oneself (Grönlund, 2011). Taylors' argument is theoretical, but recent empirical research has also shown that volunteering can provide volunteers with a sense of identity (von Essen, 2016; Wuthnow, 1991) especially due to the change towards reflexive volunteering (Hustinx, 2003), and that individuals may have multiple social identities, depending on social interaction (Grönlund, 2011).

One may understand the relation between values and factual statements in the sense that facts precede values since values are based on factual prerequisites. By this understanding, facts are self-evident whereas values are subjective and may be disputed. However, factual statements are not independent of values since there are no "brute facts". Instead reality, not least human action (Ricoeur, 1971), is interpreted, and ascribed meaning which implies that descriptions of reality may be articulated in more than one way. Hence, normative statements and reality descriptions are not totally independent of each other. An articulation of the significance of an object tends to make it different from what it was before (Taylor, 1985, p. 38).

The volunteers were asked, "What is volunteering?" On the surface, this request is about defining volunteering. But as will be evident, the volunteers interpreted volunteering and ascribed their descriptions with meaning and explanations which made volunteering normatively significant. It is impossible to judge if the values and motives referred to by the volunteers have caused their actions, and this is not what is studied. Instead, it is demonstrated how values work when constructing volunteering so that human agents may disclose their identities as engaged citizens in society.

The Volunteers

The focus will be on the narratives of the interviewed volunteers. Previous research has demonstrated that volunteers are influenced by the organisational context (Hooghe, 2003). However, here the organisations they work in will merely function as a contextual backdrop to make sense of the interviewee's narratives. Only to a limited extent will context-dependent differences among the volunteers be discussed. The material is based on interviews conducted in 2013 and 2014 with 41 volunteers active in four different hybridised organisational contexts.

The first context involved interviews with ten police volunteers at the *Stockholm Police Department*. The volunteer organisation is built into the regular police organisation, where the "volunteer coordinators" play a key role.

The second context involved interviews with ten volunteers at *Stockholms Stadsmission* (The Stockholm City Mission). This is a civil society welfare organisation, founded in 1853, involved in social work among youths and homeless persons, education and intercultural and interreligious dialogue. This extensive activity demands a professional management, paid staff and a solid organisation.

The third and fourth contexts involved interviews with two groups of corporate volunteers (eleven and ten persons, respectively) in two different *corporations* (Skandia and Accenture) offering corporate volunteer programmes. As part of their employment, the employees work as volunteers one or two days per semester, often in or for a civil society organisation.

The age distribution among the interviewees ranged from 21 to 89. Seventeen of them were men and 24 were women. Age and gender were unequally divided between the organisations. There were more women than men active as volunteers in the corporations. In Accenture, the volunteers were on average younger than in Skandia, but in both corporations they were typically middle class, well-educated and often held prestigious posts. The majority of the corporate volunteers had no previous experience of civic engagement. The volunteers in *Stockholms Stadsmission* were on average older compared to the other groups, and the distribution between men and women was fairly equal, and as among the corporate volunteers, the volunteers were often middle class and well-educated with, or retired from, a prestigious job. Among the police volunteers, the age distribution was fairly even. The police volunteers also were often persons with few resources, a problematic background, a peripheral position in society or a dramatic personal history.

Not Paid

The most elaborated upon, and frequent theme found when the interviewees were defining volunteering, was the notion that the term refers to actions that are not paid for in monetary terms. That this theme was so emphasised and elaborated on indicates that not getting paid is the most urgent theme to explain and defend. A typical statement expressing this

need comes from a middle-aged woman, active as a corporate volunteer in *Skandia*.

> I'd say that volunteering is unpaid work, at least not paid in cash. It's something you do for the sake of others. Not for your own gain but to help another, and that other person or persons is usually needy.

It is crucial that this work is not paid for and she, like almost all the interviewees, specified this aspect by adding that money cannot be involved. Actions categorised as volunteering are not performed to yield profit or gain, defined as payment in cash; instead, they are supposed to be for the benefit of somebody else, preferably someone in need. The volunteers are aware of and thankful for the wide range of valuable experiences and benefits their engagement gives them. Thus, the fact that money is rejected does not make volunteering necessarily altruistic in any simple interpretation of the concept; it is rather an exchange between actors according to specific rules. The reason for the sharp restriction against involving money does not come from a concern for the beneficiaries of those actions; and the purpose of keeping unpaid work outside the monetary system is to preserve the value and authentic character of those actions.

Engagement

Volunteering as the outcome of an engagement is another important theme. This is reflected in the answer of a middle-aged man engaged in Stockholm's City Mission who alleged that volunteering is:

> … combination of two things. One is that you have an idea. That's clear from the words themselves. You want to promote something, lift forward something, achieve something; and there's also an element of commitment. Some kind of burning idea that's not found in any other kind of work. That's what it is; an idea plus commitment.

He mentions two aspects of engagement that recur as defining properties of volunteering: firstly, engagement as having an idea, which follows from the Swedish term (*ideellt arbete*) that is etymologically related to the word "idea". However, it is not just any idea, it is specifically about goodness. No one mentioned any ideology, political conviction or belief, when they elaborated on engagement as a cause of volunteering; instead, they emphasised the second aspect of engagement, its particular function as an expression of themselves as persons.

By talking about volunteering as something they were engaged in, were passionate about, believed in, etc., they were subjectivising these actions (cf. Hultén & Wijkström, 2006). That is, they attached their efforts to themselves as actors, which may be needed when there are several possible competing motives that can make sense of a certain action (Wuthnow, 1991). The crucial function of referring to engagement is to make volunteering into actions that are intimately connected to themselves and to disclose who they are as persons.

When a middle-aged woman engaged as a police volunteer was asked what volunteering is, she answered that it is non-paid work, but her simultaneous ironical expression indicated the possible cynical interpretation that the police organisation is taking advantage of her efforts as free labour. She demonstrated that she was aware that volunteering is open to both cynical and idealistic interpretations, and continued by saying that according to her, volunteering is "… *when you feel that you want to engage in something you believe in, something you burn for* …". The answer illustrates that engagement as an inner conviction ensures that efforts cannot be contradicted or suspected to be due to cynical or improper motives (cf. von Essen, 2016; Wuthnow, 1991); neither can she be accused of naïvely being used by the organisation since her engagement serves as a valid explanation of why she is deliberately making these efforts without getting paid.

Voluntary

A third recurrent theme is that volunteering is voluntary, which has significance for the character of these actions as not monetarily compensated. To work without being paid, of one's own free will, is one precondition for not being cynically perceived as being used. This was demonstrated in the earlier quote by the female police volunteer. If perceived as actions of free will, unpaid work is categorised as something different to gainful employment.

A middle-aged woman, engaged as a corporate volunteer at *Accenture,* explained the difference between volunteering and gainful employment: "*For me, voluntary work is such efforts as go beyond the work that is expected of you in some way or another and which you are paid for.*" According to her and others, gainful employment is not a matter of free choice. But beyond the demands of everyday life there is another and different social realm where individuals can act out of free will. This does not necessarily mean that volunteering really is entirely voluntary; it is of course embedded in and dependent on social relations and organisational structures where normative pressure and social contracts can have a distinct effect (Hustinx & Meijs, 2011).

That volunteering is conceived of as voluntary is also significant for its ability to be an expression of engagement. The interviewees claimed to be genuine and sincere when engaged in volunteering, but coerced or instrumental when acting as employees. These two dynamics are shown when another middle-aged woman engaged as a corporate volunteer in Accenture talked about unpaid work, "… *there is no coercion. Instead it is born out of one's own motivation…*". As she was talking, she became somewhat disturbed at being vague and not quite able to capture the difference between being sincere and being coerced; instead, she found herself lost in "philosophical discussions". What she and other interviewees were trying to capture is that in contrast to gainful employment, their efforts are voluntary and to be voluntary engaged express themselves as autonomous subjects.

For the Benefit of the Other

The fourth theme providing the meaning of volunteering is its other-directed dimension (Story, 1992), that is, intended for the benefit of a person or cause. To be for the benefit of someone was a taken-for-granted defining property, and unlike being non-paid, this aspect did not need to be explained or defended, and there were no openings for possible cynical interpretations. An elderly woman engaged as a police volunteer answered as follows when asked about the nature of unpaid work:

> Well it's a good question. Most important, I think, is that it must be beneficial to the society or the world, even…

Some of them explicitly said that volunteering means acting with the intention to do something good, or for a good cause. But little was mentioned about the content of a good purpose and how it would be realised. However, it was not about changing or influencing society or politics, but rather to help with or amend particular shortcomings or needs. A younger man, engaged as a corporate volunteer in Skandia, expressed this apolitical understanding of volunteering by saying:

> … doing something, whatever it's possible to do, so it's these two things and you try to do as well as you can—donate money or offer your time once a month or week to safety patrol the town or work with children and young people or whatever the cause…

He mentioned these particular examples in order to contrast the voluntary character of volunteering with gainful employment, but also to contrast volunteers from persons who try to change the world because they find it "imperfect". The underlying premise seems to be that a political conviction or belief is imperative, which threatens the idea of volunteering as actions of free choice.

Some of the interviewees added that volunteering has to be to the benefit of someone or something outside their own private sphere; otherwise, it is not entirely of free choice. A female corporate volunteer in Accenture said that actions derived from predispositions or inherited behaviour

are not volunteering. She concluded by saying, "*I mean family, well you have to care of your children, sort of*". Thus, nursing or taking care of children is not categorised as volunteering since these involve actions that are either too natural or imperative to be deliberate or entirely of free choice.

So, Why Not Money?

It seems as if money has a meaning that is significant for how volunteering is perceived and how actions are categorised. Thus, to deepen the understanding of the importance of keeping volunteering disassociated from monetary exchange the interviewees' answers to the question "Why not money?", will be discussed here.

A frequent answer was that money can lead to opportunism and threatens the fragile dynamic of volunteering. Basically, the recurring idea was that if volunteering is rewarded, the inclination to act in a calculating and egoistical manner would prevail over the genuine motive to help or be benevolent. A typical statement revealing this view was given by a middle-aged woman engaged as a corporate volunteer in Skandia:

> For the simple reason that no one should be able to make an undue profit from it, because that would attract persons and groups who do it for themselves, for their own gain, …

According to her and others, the genuine dynamic of volunteering is easily overridden if money becomes involved, and the opportunistic motive to earn money will get the upper hand. It is as if the dynamic of volunteering is fragile and has to be protected against monetary incursions (cf. Zelizer, 1996, p. 485). Egoism is taken to be the "default cause" of human actions. To avoid people who are only interested in making money and let the genuine motive to help prevail it is necessary to keep money and volunteering apart.

The outlook on mankind that best fits the idea that monetary gain will make individuals act in their own interest is the idea of the economic man. The crucial presumption is that man by nature is calculus rational and will act in his own interest. However, according to the interviewees,

if there is no money involved, this dynamic will not be triggered; instead, altruistic motives can prevail. Hence, the volunteers will trust others and themselves to be altruistic when there is no money at stake, but will assume that people will act as rational egoists when money is involved. If money is not involved, individuals can deliberately and of free choice act altruistically. Volunteering is then framed so that being engaged in and carrying out these efforts is to stand out as an individual in relation to the norm of gainful employment and the natural inclination of man to act in self-interest.

There were also other reasons to reject money. Some of the interviewees said that if they got paid, it would make their engagement similar to an occupation and thus become a way to earn their living. So, they wanted to avoid money since the necessity of earning one's living in reality makes gainful employment somewhat coerced. An elderly woman and corporate volunteer in Accenture described what would happen if they were remunerated for their efforts.

> You work not only because you want to, that is just a maybe; one is dependent on work for getting by, for one's own survival. When you volunteer you're not dependent on it; you're not dependent on getting something back in order to survive, that's putting it bluntly ….

What she wanted to capture was that acting out of free will demands independence, in this case from the necessity of earning one's living in order to survive.

Several interviewees also remarked that relations become contractual when money was involved, which restricted their freedom. To be employed is a contractual, binding relationship and not a personal engagement. Hence, money challenges the voluntary character of unpaid work both because of the need to earn one's daily bread and because of the binding character of contractual relations.

There were persons in all four groups who declared that volunteering entails a risk of becoming opportunistic and egoistic if money is involved. However, this inclination to defend the altruistic character of volunteering was more frequently found and emphasised among the corporate volunteers than among the interviewees in the other two groups. Some of

the police volunteers on the other hand said that they felt the need to explain and even defend their engagement since some people could not understand why they made these efforts without getting paid. Thus, it seems as if the corporate volunteers, who were often rather well-off, had to defend the idea of volunteering against the inclination to act as the rational egoist, whereas the police volunteers, who were more often living in and confronted with a poorer environment, had to defend their engagement against the suspicion of being used.

The interviewees also declared that money would be an immoral motive for volunteering. One younger woman, who was engaged as a corporate volunteer in Accenture, said that it would be a nightmare if their efforts were paid since it would lead to people becoming engaged *only* for the money. A younger man, who was engaged in corporate volunteering in Skandia, declared that if money were accepted, the very definition of goodness would be challenged since it would mean that money and goodness were being confused. The underlying premise is that you cannot be paid for being good because goodness demands that you are sincere, and money makes relations instrumental (von Essen, 2015). It is by the rejection of money that volunteering can be conceived to be a morally significant action.

These are the reasons for excluding money from the precarious dynamic of volunteering. When the interviewees tried to explain why money was rejected, they talked about preserving volunteering as actions of free will. In their answers, they oscillated between the practical need for an income and an abstract idea of the nature of man as two threats to the voluntary character of volunteering. But irrespective of their practical or abstract reasons, material needs and benefits had the character of an "ultimate concern", as an imperative necessity. To be able to act from free will so that their actions were expressions of themselves as actors they had to be autonomous and independent of their practical needs and of human nature.[1]

[1]See Haers and von Essen (2015) for a discussion on free will and the Christian calling of neighbourly love.

The Rewards of Unpaid Work

The fact that money was rejected does not mean that volunteering cannot be rewarded at all. On the contrary, when the interviewees elaborated on why money was rejected, they were anxious to mention all the other good things they received from their volunteering.

When elaborating on their rewards they talked primarily about what they experienced through helping. This was exemplified by many different narratives, but on an abstract level they talked about the profound meaning of helping someone without expecting anything in return.

The corporate volunteers talked more often than the others about the satisfaction of using their professional skills to help others. Hence, they often reflected a certain consultancy perspective on how to help and empower the persons they met.

When asked about what they gained from their efforts the interviewees also talked about the social aspects of their engagement and referred to the people they came to meet while carrying out their efforts. Several talked about how meeting a person in need or being able to help someone could create a certain intimacy. These encounters had changed some of the interviewees' lives and had made them more confident in asserting the importance of love and solidarity among people.

Other interviewees also described the social context they were part of. Some mentioned the fellowship and friendship with other volunteers as a reward. One middle-aged man, engaged in the Stockholm City Mission, mentioned the care the organisation showed its volunteers, saying:

> … they often offer you cakes or buns, and coffee is free and things like that, so it's not money I get, but a cup of coffee and a nice bit of cake or an ice cream ….

When they talked about the social aspects as rewards for their efforts the absence of money was significant. They did not receive social relations, gratitude, care and trivial gifts as compensation for not being paid. Instead, they could appreciate the social dimension of their engagement because money was not involved. The gifts and the social relations were not categorised as a second-best form of payment. Thus (the absence

of) money was significant for the social relations enjoyed through their engagement.

Their engagement led to relations with people that were quite different from those in their ordinary everyday life, and implied encounters with new lifestyles and different social conditions. Some interviewees valued these encounters and said that because of their engagement they had come to understand what it is like to live in poverty and need. These experiences often perplexed them and sometimes changed them as persons by widening their perspectives,[2] even causing some of them to reconsider their political standpoints.

A recurring notion among the interviewees was that they wanted to find their efforts meaningful. To see themselves as good persons and to be able to receive and enjoy the social dimension of their engagement, their rewards had to be categorised as gifts. A younger man and corporate volunteer in Accenture elaborated on what would happen if he were paid for his efforts:

> …then it's a matter of someone buying your services rather than you doing what you do simply because you want to do it and that would be a hindrance in terms of motivation.

He said that he believed that for most people not being paid is positive because one can then get something else in return for one's engagement and he found this more valuable than ordinary payment. If people were paid, their efforts would be transformed from being gifts into exchanges and what they received would lose its meaning. A middle-aged man, engaged in Stockholm's City Mission, explained how money would affect the categorisation of his actions:

> … otherwise it's more of an exchange. I exchange one unit for another unit. But for me volunteering is about me giving something, in this materialistic physical world we live in.

[2]For the use of the term "perplex" see Eliasoph (2013).

If his efforts were categorised as exchanges, then what he received would be an expected and calculated payment. He was fairly comfortably situated and used to business relations, but exchanges could not make him into a good person since, as he said, goodness cannot be bought. What was at stake for this man was his urge to give, in spite of and in contrast to the material world they all live in. So, acting as good persons by helping someone and the good feeling and satisfaction they experienced demanded that their rewards were categorised as gifts. The middle-aged man engaged in Stockholm's City Mission quoted above expressed this idea as, "… *volunteering means that you're not expecting any payback, but at the same time, that is what you do get*".[3]

Intention is obviously important. If they carried out their efforts with the intention of getting paid, their actions would have been categorised as exchanges. Hence, to be able to receive rewards from their engagement, the reward had to be unexpected. Calculative motives for unpaid work would preclude the unexpected rewards of their engagement. However, also the presence of money as such, and not only the intention to get them, would determine how their actions were understood. Several interviewees felt a need to defend the precarious dynamic of unpaid work from a societal order where money is a central value and defines most human relations.

Discussion

According to the interviewees, volunteering entails voluntary, unpaid efforts and expressions of a personal engagement to act for the benefit of someone else. This description resembles the common and prevalent definitions of unpaid work that can be found in research on volunteering, with the exception that the organisational context is not included and the personal engagement is emphasised (e.g. Handy et al., 2000;

[3]See von Essen (2015) for this paradoxical pattern and its structural similarity with the Lutheran doctrine of the calling.

Musick & Wilson, 2008). There are of course many possible explanations for the exclusion of the organisational aspect. However, considering the hybridised character of the interviewees' contexts this exclusion is possibly due to a shift from a collective to an individualistic mode of involvement (cf. Hustinx, 2003).

Charles Taylor's ideas about strong evaluations and evaluative horizons providing a vocabulary of worth will now be used to unfold how the interviewees' volunteer experience is used to construct and disclose their identities.

It was important for the volunteers to reject money; by doing so, they preserved volunteering as actions carried out of their own free will. To ensure that their actions were expressing their identities they had to be autonomous and independent of the need of earning their income. By interpreting volunteering as actions performed by sincere agents their identities could be disclosed by these actions, leaving no room for interpreting the actions as coerced or calculative, which would jeopardise the authenticity of the agent.

However, this relation to money was context-sensitive. In another context, when acting as employees for instance, they acted according to other rules without violating their authenticity. How money is transferred in exchanges between people defines social relations and meaning systems, and to use the incorrect transfer violates or challenges social relations (Zelizer, 1994). The empirical results indicate that values are used according to Taylor's argument, but with the proviso that values have different meanings in different social contexts (see Grönlund, 2011 and the chapter of Sirris). According to the interviewees, the involvement of money would definitely determine whether their actions were categorised as volunteering or not. This is not only because of how the concept of volunteering is defined. If money were involved in volunteering, it would have to be interpreted as a compensation and their efforts would have to be understood as exchanges between parties. Hence, money is an artefact that has social meaning in itself, regulated by social conventions and defining social relations.

When referring to their engagement, the interviewees gave assurances that their efforts were genuine and therefore categorised as other than

gainful employment. These two categories of action, structured by different dynamics—gainful employment based on the need for an income and volunteering based on a personal engagement—were contrasted with each other throughout in the interviews, often in juxtaposition in order to acquire their meaning through the mirroring of each other. That volunteering was evaluated in contrast to gainful employment was articulated when they said that their engagement was voluntary, in contrast to coerced employment which makes volunteering into a voluntary and personal engagement.

When the volunteers elaborated on these themes, they recurrently referred to values that stood in contrast to dominant norms in society which made them appear as persons in society. The idea that volunteering constitutes a genuine and free realm deviant from and alternative to the materialistic society the interviewees were living in, was an overarching theme. How volunteering was perceived and expressed was dependent on this idea. Thus, the notion of volunteering as comprising meaningful altruistic actions of free choice did not emerge *in spite of* the individualistic and materialistic character of contemporary society. On the contrary, volunteering was conceived to be altruistic *because of* the materialistic society (see Wuthnow, 1991). This relation between materialistic society and altruistic volunteering is crucial; in order to understand the functions volunteering serves for individuals, but also how it is conceptually defined. This demonstrates that cognitive meaning, how volunteering is conceptualised, and normative meaning, how it matters to individuals, are dependent on each other.

Hence, according to the interviewees a society characterised by a competitive, individualistic and self-interested culture does not make volunteering more instrumental. On the contrary, such a society provides motives for engagement. Furthermore, it constitutes the evaluative horizon wherein an individual can deploy a language of evaluative distinctions to make strong evaluations, and by preferring contrasting values can disclose his or her identity as a reaction against the prevailing social order.

The motives for volunteering are not only about finding solutions to practical problems; there is more at stake. To be engaged makes it possible to refer to values by which one can disclose an identity as an authentic

person free from the striving for material gain and acting for the sake of goodness. This construction of volunteering involves an evaluative horizon enabling a social realm of freedom and compassion in contrast to the materialistic society where individuals can appear as engaged citizens by referring to values that motivate their engagement.

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14

The Value of Group Reflection

Beate Jelstad Løvaas and Gry Bruland Vråle

I would have continued to stay in water, doing my best until I got ill. I will never dare to stand alone again – that is what this group has taught me!
—Participant in a managerial group reflection

Introduction

What happens when managers from different organisations reflect upon their challenging work relationships and everyday relational work situations? Being a manager at work can be lonely and challenging. In daily practice, many activities that managers perform are unconscious and

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unspoken. Collective reflection presents an opportunity for the managers to bring the unspoken and unconscious to the forefront, thus creating a space for the identification of values. Group reflection can strengthen values consciousness and reflexivity among individual actors. As values guide choices of actions, values consciousness may even change and improve practice (Aadland & Askeland, 2017), which is also suggested by the positive relationship between managers' values consciousness and innovation in organisations (Nygaard & Løvaas, 2019). Thus, working with values such as having a space to reflect on activities and work situations may facilitate values consciousness and allow for changes and improvements in practice. In this way, group reflection may serve to link everyday practices with the overall purpose of the organisation.

Values work both presupposes and increases reflexivity. The concept of values work, as described in Chapter 1, includes 'reflection-creating processes' producing value-related actions in specific situations (Espedal, 2019, p. 30). This chapter situates the perspective of values work by investigating the significance of middle managers' reflection processes in a group supervision programme. Hence, managerial group reflection serves as an example of values work. We adopt a practice-based and micro-level perspective on how to perform values work, as described in Chapter 1. Since the chapter explores group reflection processes that involve managers from different organisations, we look specifically at values work being performed by managers outside their daily institutional environments that produce value-related actions inside their organisations.

In this research, we pay special attention to reflections on challenging work relationships and everyday relational work situations. Relationships at work can be a source of enrichment that allows individual actors and organisations to learn, grow and flourish, or they can be toxic and dysfunctional. Relationships are fundamental to organisations and have always been a part of organisational theory and management theory (Heaphy et al., 2018). Management researchers have long recognised that the 'people make the place' (Schneider, 1987). Further, positive organisational scholars have given attention to work relationships by the substantial body of research on high-quality connections as a powerful source for organisations (Dutton & Heaphy, 2003; Stephens, Heaphy

& Dutton, 2012). Thus, reflecting on work relationships and daily relational situations and practices is important to organisations, as the reflections may enable new actions and practices that could be more beneficial than the routinised versions. This study aims to examine the significance of managers performing values work via group reflections on challenging work relationships and everyday relational work situations. Specifically, it examines how middle managers in organisations can be relational agents aiding individual actors and organisations with work relationships and hopefully contribute to the betterment of workplaces.

Reflection groups are of different types, such as supervision groups (Vråle, 2017), ethical reflection groups (Aadland, 2010; Eide & Aadland, 2017) and coaching groups (Brown & Grant, 2010). An aspect common to all these types of group reflection is that they all belong to the 'thinking slow' category (Kahneman, 2011). In his book titled, *Thinking Fast and Slow*, Kahneman draws attention to how the human mind works to improve judgements and decision-making. This study is mainly concerned with the process of thinking slow together with others—reflecting together in groups. Group reflection, as opposed to individual reflection, can offer additional information that may lie outside one's own thoughts. It may also allow for identification with others to foster mutual learning and growth. This occurs through the mechanisms of recognition—where individuals recognise aspects of their selves in others—and integration—where individuals incorporate aspects of others into their own selves (Humbred & Rouse, 2016).

In this chapter, we describe a qualitative empirical intervention involving group reflections with middle managers from different work sectors. The intervention was a supervised group reflection implemented over a six-month period. The aim was to examine the value of supervised group reflection, and the research question guiding this chapter is: *What is the significance of middle managers' participation in a group supervision that focuses on their work relationships?* We investigate both the processes of group supervision and the practices/outcomes, with a specific focus on value-related actions.

Theoretical Framework and Previous Research

Identity

Identity is essential to social life and is a central construct to meaning and motivation, logics of action and decision-making among others. Identity answers the question 'Who am I?' and covers roles, social relations and group membership. Studies on identity are situated in different contexts such as organisational, professional, social and individual. We focus on the individual level and view identity as 'the sense an individual has of oneself' (Grönlund, 2011, p. 855). This sense of self is viewed as a reflexive and continuous project (Giddens, 1991). In other words, identity changes and develops throughout an individual's life. This ongoing process of constructing identities is called identity work (Svenningsson & Alvesson, 2003). As discussed by Askeland (Chapter 2 in this volume), values are part of and inherently connected to identity and identity work. Thus, we argue that working with values in group reflections is connected to the ongoing process of participants' identity work.

Self-Awareness in Identity Processes

The concept of self-awareness is rooted in the disciplines of both psychology and sociology (Carver, 2012), and it relates to the salience of social and personal values. Self-awareness in identity processes is related to the concept of self-identity (Sirris, 2019). It implies having access to one's values, feelings and processes. Self-awareness also implies flexible access to one's own affects. The self has a unique capacity termed reflexivity, which refers to 'the ability to turn around and take itself as the object of its own view' (Carver, 2012, p. 50). In this chapter, we specifically focus on self-awareness because participation in group reflection facilitates processes of self-awareness and consciousness, which are related to questions such as 'Who am I' and 'Who do I want to be, should be and can be' (Vråle, 2015). Identification with others also strengthens self-awareness. Identification is linked to the question, 'How do I come to know who I am in relation to you?' (Humbred & Rouse, 2016, p. 438). Identifying

with one another, for instance in a group reflection, may foster mutual learning and growth.

Supervision

Scholars (such as Tveiten, 2013; Vråle, 2015, 2017) have explained supervision as conscious reflections and dialogues based on humanistic values, related to experiences from practical leadership. It helps managers focus on their own manners, understand themselves better and possibly change their ways of thinking and practices as leaders (Vråle, 2017). Severinsson (2014) notes even though supervision is a relatively new scientific method, its results confirm the importance of the opportunity to reflect on one's practical work. Brunero and Stein-Parbury (2008) reported that supervision may prevent burnout, and Løkvik (2019) showed that the positive outcomes of group reflection include increased self-consciousness and increased organisational commitment. Jensen, Rossavik, and Husebø (2018) concluded that group supervision for middle managers may create common room for understanding different problems and encourage leaning on others for support when new challenges occur.

With regard to ethics reflection groups, Hem, Molewijk, Gjerberg, Lillemoen, and Pederson (2018) showed that participants promote improved professional competence and confidence. Vråle, Borge, and Nedberg (2017) identified courage as an important dimension of ethics reflection groups. While a number of studies have examined the influence of group reflection on nurses in health care, few have focused on managers.

We aim to add to the knowledge on group reflection among organisational managers with the help of an action-based intervention. We also seek to contribute to the sparse literature on values work (see Chapter 3 by Espedal for a review), proposed by Gehman, Trevino, and Garud (2013), by studying how engaging in group reflection processes outside their institutions allows managers to produce value-related actions inside their organisations.

Method

We conducted a six-month group supervision programme, from November 2017 to May 2018, for middle managers from different work sectors. As part of the intervention, the participants reflected on their challenging work relationships, everyday relational work situations and practices in a group.

Six female middle managers from different work sectors were recruited from a value-based leadership programme at VID Specialized University to attend 10 supervised group reflection meetings (Table 14.1). Four of the participants were from the non-profit sector, one participant was from the public health sector, and one participant represented the private profit sector. Three of the four non-profit participants worked at different faith-based institutions. The age range of the participants was from 30 to 60 years.

The study adopts an action-based approach that aims at both taking action and creating knowledge (Coghlan & Shani, 2018; Greenwood & Levin, 2007; McNiff, 2017), described in the following. Inspired by the principles of research circles (Slettebø, 2013) where practitioners develop research questions along with the researchers, we invited the participants to a workshop (Meeting 1). Questions such as how to develop sustainable relationships at work were introduced by the participants in the workshop, and they were addressed in the focus group interviews and during the group supervisions.

The researchers were leading and taking part in all of the 10 meetings. Information from the two group interviews (Meetings 2 and 10) was recorded and transcribed, and translated direct quotations from these

Table 14.1 Outline of the group meetings

Meeting 1	Workshop in which the researchers (authors of the study) and practitioners (six informants) jointly developed ideas for the research question
Meeting 2	Focus group interview before the group supervisions about relational work, practices and values
Meeting 3–9	Seven group supervisions on relational aspects of leadership (intervention)
Meeting 10	Focus group interview after the group supervisions

meetings have been included in the findings. During the seven group supervisions (Meetings 3–9), log notes were maintained by us. References to these log notes in the findings are not always direct quotations, but close interpretations of the participants' views. The participants confirmed the interpretations and also commented on the preliminary drafts of the chapter.

Description of the Intervention

We used team reflections (Andersen, 1994), ethical reflections (Aadland, 2010; Eide & Aadland, 2017), and 'outsider witness responses' (Lundby, 2005) in the supervision group meetings. Each meeting lasted for 90 minutes. The intention behind all the sessions was to create space for recognition and identification. Each session began with the supervisor reading some text based on topics from the previous meeting to introduce continuity, such as a passage on self-consciousness. This was followed by a group participant narrating an event from her daily work as a middle manager. One of the supervisors interviewed her. While she narrated her story, the other participants reflected as a team (Andersen, 1994), they first listened without speaking.

After the narration, the rest of the group shared their reflections in a fixed format: what special detail in the narration made an impression on them, what according to them was the intention of the narrator, what related experience did they remember from their role as a leader, and what did they want to tell the owner of experience (Lundby, 2005). The reflections were instructive and were to be shared in an open and appreciative way. They were also expected to be informative and valuable to the rest of the participants. At the end of each session, the supervisor asked the narrator to summarise her learning and her key takeaways from the session for future reflections.

Data Analysis

First, data from the two group interviews were transcribed. We independently noted interesting and important aspects in the transcripts and

developed initial coding categories. Next, we discussed and refined our preliminary coding and categories and jointly developed the categories through mutual consent. Treating coding as a starting point rather than an end point (Locke, Feldman, & Golden-Biddle, 2016), we also identified three questions: (1) What kind of relational situations did the participants bring into the supervision groups, (2) what types of relational mechanisms occurred within the supervision group, and (3) what did the participants gain out of the supervision group—where did they move? These questions shaped our interpretation of the data. Thematic analyses and systematic coding of the data were performed using NVivo. We also relied on theories on self and identity for understanding the material. We went back and forth between empirical data and theoretical frameworks until we were satisfied with our justification of participant experiences. Oscillating between data and existing theory signals the use of an abductive approach (Bryman, 2012).

Ethical Considerations and Limitations of the Study

This study was approved by the Norwegian Social Science Data Services (NSD). The respondents were informed about the intended use of the data, confidentiality of information, voluntary participation, etc.

A methodological limitation of this study is that intervention was evaluated by the researchers who conducted it. The researchers/authors of the study were also the supervisors of the group reflection intervention. However, to ensure an objective evaluation, the evaluation process was therefore conducted on paper, and participation information was anonymised. Another limitation of this study is that the sample did not include any male leaders.

Findings

With regard to the first question of what relational situations were brought into the group, seven situations were narrated in the seven group meetings. Four were pertained to cooperation problems with a (superior)

leader, one was related to a subordinate, and two were related to private decision-making—of which one concerned a family business. One situation was addressed twice, as a follow-up after some months.

The narrations examined values such as power versus powerlessness and trust versus mistrust. Participants expressed their powerlessness and mistrust in different ways. Juggling two parallel levels of hierarchy in the organisations made the power structure unclear and unpredictable for the middle managers. One of the managers complained of being tired, 'I have tried to tell them in 5 years and six months'. Another expressed feeling trapped by her superior: 'I feel I am "bought and paid", I am a dependent upon my leader because I need a reference from her'. Powerlessness was also expressed as lack of hope: 'There is no way back, the conflict has gone too far'. One participant described her leader's evaluation of her in the following words: 'I was characterised as passive aggressive by the leader in a group meeting at work. That is the worst thing I have ever experienced'. These accounts test the value of trust, which is fundamental to a healthy work relationship.

Negative evaluations by leaders (such as being passive aggressive) may disturb an individual's sense of peace and force them to lose control over work, feel tired or report sick. Other values that were highlighted in the narrated situations were honesty—'I can't answer honestly'—and freedom—'I do not wish to be bound by structures of power! I want to choose my own way'! Powerlessness and feelings of helplessness may be understood as an existential phenomenon. Analysing such situations in a group reflection may help leaders decide on the next steps while fulfilling their responsibility and duties (Severinsson, 2014).

The second question pertained to the relational mechanisms seen in the group reflections. We found that participants *developed* and *practised* values such as openness and courage in the supervision group. One participant expressed it as follows: 'Practicing openness, honesty and courage in the group and experiencing identification from the others created movements and growth for me individually and for us as a group'. The openness *practised* in the group was evident when a participant described herself as passive aggressive. By telling the group that it was 'the worst thing I have ever experienced', she demonstrated a willingness to share without fear. Similarly, the participants discussed and openly disagreed

on topics such as the merits and demerits of leadership alliances. The participants seemed to feel safe among middle managers from different organisations. One participant described the group as a space to 'slap and slam, but also to test out', which was indicative of a safe environment in the group.

Openness was also evident in the sense of inquiry that characterised the group discussions: the supervisors and participants used open-ended questions instead of defining and concluding statements. One participant summarised this experienced in the following words: 'You ask questions, without having a direction, but rather being open. I think this is important to for me to do as a leader as well'.

The value of openness was *developed* at an early stage in the supervisions. In the first group meeting, time was spent on becoming familiar with the group and laying down some rules, such as for confidentiality. This process could have enabled and facilitated openness. Further, the structure of the group session was the same for all the seven sessions. This predictable structure may also have contributed to the psychological safety (Edmondson, 1999) and sense of creativity of the participants.

As the participants freely shared their stories, the supervision group engaged in identification through the mechanism of recognition, where individuals recognise aspects of themselves that they share with others, and through the mechanism of integration, where individuals incorporate aspects of others into their own selves (Humbred & Rouse, 2016).

The findings related to the third and main question (what the participants gained from the group reflections) can be divided into two categories: moving inward and moving forward. The first represents individual growth and self-awareness in identity processes, while the latter captures value-related actions.

Moving Inward

Some of the individual actors learned more about their own emotions from the group reflection work. Statements like 'I didn't know I was that angry' highlighted *increased awareness of one's own emotions*. During a session, the supervisor asked a participant to rate her anger on a scale

from 1 to 10, with 10 being the highest. The participant answered, 'At least 8. My anger is in my stomach and in my neck'. The scaling question served to awaken and generate awareness of unrecognised feelings.

Listening to the others' reflections on one's own narration also stirred suppressed emotions, as noted by a participant: 'My feelings have been very much stronger after this meeting. It is a note to self that I carry feelings, I don't want to overlook these feelings'. Thus, the group reflections enabled the individual actors to be more aware of their own emotions.

Another approach to moving inward and developing self-identity is the *awareness of one's boundaries* (Schibbye, 2011; Vråle, 2015), which has a dialectical relationship with self-awareness. To be well-defined as a person, one should be self-reflexive and vice versa (Schibbye, 2011). One of the participants noted that meeting in groups helped to 'get to know own limits and boundaries, to take care of oneself'. This points to the development of self-awareness through the knowledge of self-boundaries. Another participant said, 'The group helped me to clarify what are my limits'. One participant learned to correct her own mistakes with the help of group reflections, and another participant called for more challenging discussions to identify any blind spots that she may have.

The findings indicate that the development of self-identity is accelerated when individuals find their own feelings, thoughts and reactions reciprocated in others' experiences. A participant expressed this as follows: 'One needs an echo-room, a soundboard room like this'. This quote highlights the need to be identified and appreciated. Identification through recognition is vital to growth and learning (Humbred & Rouse, 2016), and consequently, for the development of self-identity.

Before the intervention, the participants were asked about their expectations from the programme, and they all mentioned self-development in one way or another. These expectations were collectively experienced as 'moving inward'. Findings indicate that spaces for group reflection enable individual actors to *move inward* through increased self-awareness of emotions and through increased awareness of own boundaries. This is an approach to constructing self-identity and thus performing identity work.

Moving Forward

The group reflections also enabled the participants to 'move forward' in different ways. One participant moved forward by quitting her job. Another one commented that the supervision group helped with a difficult decision: 'The group gave me strength to take an important decision. It has been a catalyst for the decision I have had inside for some time'. The courage to overcome difficult situations, including feelings of powerlessness, can be explained by the encouragement received in the supervision group. Similar findings reported by Vråle et al. (2017), Rokke (2017) and Jensen et al. (2018) suggest that the development of courage is a result of group reflection. In the study, the reflections empowered the participants to move away from feelings of loneliness and powerlessness to courageous decisions. Some participants who were 'stuck' found a way forward.

Some participants also moved forward by implementing new changes in their actions. For instance, while having a difficult conversation with her leader, one of the participants tried to be more humble and vulnerable. She actioned this new approach by informing and sharing her emotions with the leader: 'Now I have tried to add a new element in the dialogue, I have included my emotions in a way. That was actually a success'. The participant moved forward by trying out a new approach. She found it to be successful as her leader responded to her by communicating in a 'more human' way. This is an example of values work: how group reflection processes performed by leaders outside their daily institutional environments produce value-related action inside the organisation.

In sum, this study indicates that the significance of group reflection and slow thinking (Kahneman, 2011) enables individual actors to *move inward* through increased self-awareness and to *move forward* by implementing value-related action. These findings are illustrated in Fig. 14.1. The 'bringing in' component in the figure represents the situations narrated by the participants, and the space for group reflection in the figure represents what happens when reflecting together. In addition to the mechanism of recognition, experiences of openness and identification describe what happened in the space for group reflection, enabling the participants to move inward and forward.

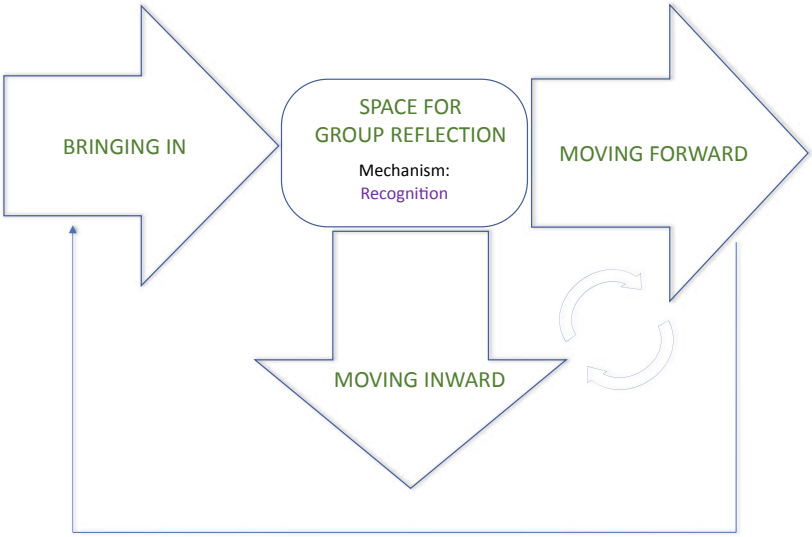

Fig. 14.1 The process, mechanism and significance of group reflection

Discussion

Findings indicate that spaces for group reflection enable individual actors to *move inward* via identity processes such as increased awareness of own emotions as well as to *move forward* by implementing new actions (Fig. 14.1). The arrow between moving inward and moving forward can be explained as increased awareness of emotions that leads to forward movements. For instance, one participant said, 'Workers come to my office and pour their rage. I have to follow the administrative line. I deal with my rage by seeking three new jobs'! This is a practical example of the link between moving inward and moving forward. There also exists a link between the 'moving forward' box and the 'bringing in' box in Fig. 14.1. While there is no empirical evidence to support this linkage, it has been included to signify that moving forward, such as trying out new steps of action, can introduce new challenges.

Findings from this study indicate that group reflection on daily work situations narrated by leaders may help individual leaders to increase their self-awareness. This self-awareness may stem from the process of

listening patiently to a narrator's story in a group reflection, with an open mind and in complete attention. The structured and predictable format of group reflections and the guaranteed confidentiality of the information shared possibly create a safe space for the members in the group (Vråle, 2015). Articulating difficult situations and experiences in a safe atmosphere, as well as identifying and naming the values at stake along with other leaders, sensitises the participants to new meanings and to their own feelings, values and thoughts. Further, self-identifying and being identified, through mirroring and emotional support from other group members, seem to facilitate increased self-awareness and integrity in decision-making related to daily work.

A key finding of this study is that the participants experienced increased awareness of their own emotions. One participant did not realise the extent of her anger (moving inward), while another moved forward by communicating her emotions to her leader. Emotions can provide valuable information about the values at stake. They may function as safeguards or alarms, signalling that important values, such as integrity and trust, are under threat. This may manifest in an awareness of anger, as with the participant in the supervision group. Values are made meaningful through emotions, that are the 'glue binding people together' (Zietsma, Toubiana, Voronov, & Roberts, 2019). Although emotions shape the lives, actions and experiences of institutional actors (Zietsma & Toubiana, 2018), until very recently, they have been largely ignored in the literature on organisational institutionalism (Lok, Creed, DeJordy, & Voronov, 2017). Focusing on emotions in organisations is relevant and important to organisational life and practices. This study shows that group reflection enables individual actors to move inward by developing self-identity. Identity is fluid and not static; as a result, actors continuously construct their identity. Working with values in a group reflection is one approach to constructing identity and hence performing identity work (Sirris, 2019).

The role of reflection is a central component of the agency perspective that involves awareness of possibilities in everyday work situations. Based on the findings of this study, we argue that managerial group reflection on relational work situations, as a way of performing values work, may nurture relational agency. Relational agency can be defined

as a 'reflexive and purposive capacity to initiate and carry out actions for improving relationships in the workplace' (Sundet & Carlsen, 2019). The agency perspective proposes a lasting capacity that goes beyond the momentary meetings highlighted, for instance, in the substantial body of research on high-quality connections (Dutton & Heaphy, 2003). Relational agency is an important concept and approach as it has the power to influence what many people consider the most important aspect of life—relationships, and moreover, the quality of relationships (Waldinger, 2015). Thus, at a practical level, investigating and finding ways to seed relational agency in managers may play an important role in organisations and potentially contribute to the betterment of workplaces. Group reflection on practices and everyday relational work situations can be seen as an avenue to seed relational agency in managers through experiences of openness, identification and recognition in the group, enabling individual actors to move inward and forward. Thus, values work through managerial group reflection can be an approach to cultivating relational agency.

Concluding Remarks

This chapter highlights the significance of middle managers' group reflection centred on their work relationships. In essence, group reflections are valuable as they enable individual actors to move inward, by constructing their self-identity, and move forward by executing new steps of action at work. Values work effected by managerial group reflection can be an approach to cultivating relational agency. Such engagement may contribute to better practices and thus better quality of organisational life and services. In this way, values work may serve to link everyday practices with the overall purpose of the organisation.

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