CONTINUING EDUCATION AND COOPERATIVE EXTENSION: A COMPARATIVE ASSESSMENT OF ORGANIZATIONAL CULTURE

A Thesis in
Workforce Education and Development

by

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ABSTRACT

The purpose of this doctoral dissertation study was to assess and compare the organizational cultures of Continuing Education and Cooperative Extension at Penn State. Two key questions served to guide this research. Are there differences between the organizational cultures of Continuing Education and Cooperative Extension? If so, what variables indicate cultural differences between Continuing Education and Cooperative Extension?

The reason why it was important to conduct this research study is that prior to 1997, Continuing Education and Cooperative Extension were housed within separate administrative units and had relatively little contact. In 1997, these units were brought together within the organizational structure of Penn State Outreach and Cooperative Extension and were encouraged to collaborate and cooperate.

The target population for this study included all of the directors of continuing education, continuing education area representatives, and county extension directors at Penn State. This population was selected because these positions are outside of the University Park campus; these positions have managerial/supervisory responsibility within their respective units; and, these positions are perceived as parallel within the organizational chart. Electronic mail addresses were obtained from the associate vice presidents for outreach who direct Continuing Education and Cooperative Extension. The total target population for this study included 135 individuals.

The research methodology included using the Cultural Health Indicator survey developed by Emerge International and validated by Dr. Lloyd Williams. The Cultural
Health Indicator is a web-based instrument consisting of 98 forced-choice statements with five-point Likert-type rating response scales. The statements address seven dimensions of organizational culture: leadership, relationships, communication, infrastructure, involvement and decision-making, change management and finance. Three open-ended questions were also included to elicit additional comments from respondents.

The multiple regression model analysis showed significant differences in the perceptions for the infrastructure dimension when examined by the five demographic variables and by organization represented. Organization represented was the only significant factor in explaining differences in perceptions of infrastructure when accounting for all other demographic factors using the multiple regression model.
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Chapter 1

INTRODUCTION

The purpose of this study was to assess and compare the organizational cultures of Continuing Education and Cooperative Extension at Penn State to explore the compatibility of a partnership between these units. Two key questions guided this research. Are there differences between the organizational cultures of Continuing Education and Cooperative Extension? If so, what variables indicate cultural differences between Continuing Education and Cooperative Extension?

The reason why it was important to conduct this research study is that prior to 1997, Continuing Education and Cooperative Extension were housed in separate administrative units and had relatively little contact. In 1997, these units were brought together within the organizational structure of Penn State Outreach and Cooperative Extension where they were encouraged and expected to collaborate and cooperate.

This chapter will provide an historical perspective of the movement to reorganize Cooperative Extension and Continuing Education into university Outreach units. It will also list the problem statement that drives the research questions, explain the significance of this study, and present the research questions. This chapter will also identify limitations of this study, define the key terms important to this research, and share the assumptions of this researcher.
Historical Perspective

In the past eight years, structural changes in primary outreach units have occurred in land-grant institutions across the nation. These changes have been instituted to enhance the effectiveness of university outreach. Across the country, “There has been substantial discussion concerning the movement of Extension out of colleges of agriculture to more university-wide outreach units” (Warner, 1996, p. 58). One can identify numerous universities where this trend is growing, however, it is not universal. Nearly four out of five (71%) Cooperative Extension Services remain in agriculture, and 13% have been elevated to the university level as outreach units (Warner, 1996).

As is the case with all groups, some kind of originating event marks their beginning (Schein, 2004). In this specific instance the precipitating event occurred in 1996 when Penn State President, Dr. Graham Spanier, announced a plan to strengthen Outreach and Cooperative Extension at this land-grant university. The purpose of the plan was to improve collaboration among the University’s outreach units and academic colleges (Penn State Outreach and Cooperative Extension, 1998).

As indicated in the Outreach and Cooperative Extension strategic plan, the goal is to build upon the strengths of Cooperative Extension, Continuing and Distance Education, and other major outreach units of the University to enhance the partnership with all colleges. Penn State believes that enhanced outreach efforts will address pressing social problems which, in turn, support the University mission to integrate teaching, research, and service (Penn State Outreach and Cooperative Extension, 1997, p. 1).
This partnership brought together, under the leadership of a vice president, four units within the university: Continuing Education, Cooperative Extension, Distance Education, and Penn State Public Broadcasting. “Penn State Outreach reaches more than five million people in all sixty-seven counties, every state, and eighty countries, on six continents, through its outreach programming” (Penn State Outreach and Cooperative Extension, 1998, p. 1). The World Campus has since enrolled a student in Antarctica and Penn State Outreach now reaches people on every continent.

It is this researcher’s understanding that organizational culture was not a key component in the decision to create the Outreach and Cooperative Extension partnership. In fact, no cultural assessment has been conducted within these units at the level of middle management addressed by this research study. A recurring theme throughout the development and evolution of this partnership has been, for this researcher, the common perception of cultural differences between the Outreach units. This study investigated the difference in perceptions of cultural differences between directors of continuing education, continuing education area representatives and county extension directors. This study assessed and compared organizational culture within two of the aforementioned units, Continuing Education and Cooperative Extension.

In addition to knowing the cultures of the organizations that may be combined, the personal perceptions of the group leaders also have an effect on the organization’s culture. The individual founder of a new group has a set of personal visions, goals, beliefs, values, and assumptions that he will impose on the group (Schein, 2004). Only if the leader’s personal view leads to shared actions that are successful will the group act again on these beliefs and values.
A Kellogg commission on the future of state and land-grant universities studied the topic of university outreach; they used the synonymous term engagement. For the purpose of this study the term outreach will be used. The Kellogg commission indicated that university hubris has resulted in the asynchronous expectations that prompted the movement toward university outreach. One reason for this movement toward university outreach organizations is that:

Although society has “problems,” our institutions have “disciplines.” We are so inflexibly driven by disciplinary needs and concepts of excellence grounded in peer review, that we have lost sight of our institutional mission to address the contemporary multidisciplinary problems of the real world” (National Association of State Universities and Land-Grant Colleges. Kellogg Commission on the Future of State and Land-Grant Universities, 1999, p. 4).

It is in the context of negative public perception of institutions of higher education, such as those contained in the Kellogg Commission report, that structural realignments occurred including the creation of the division of Outreach and Cooperative Extension at Penn State. Other universities have used a variety of titles and organizational schemas, but the result is that universities are striving to become more accountable to and connected with the many publics they were created serve.

In recent years, our universities have been accused of pursuing esoteric research (an echo of the 1960s), of standing aloof from the concerns of the public, of raising their fees so unconscionably and irresponsibly as to
place higher education out of the reach of people with average incomes, of
gobbling up scarce resources in a self-indulgent, self-serving fashion while
failing to contribute to the society’s most urgent problems, of multiplying
an obsessive form of specialization that makes it impossible to deal with
real-world issues, of living in a subculture cut off from the mainstream –
isolated, contemptuous of average citizens, and subversive of the values of
society as a whole (Walshok, 1995, p. xi).

This study explored the similarities and differences in the organizational culture
of Outreach at Penn State, as perceived by directors of continuing education, continuing
education area representatives and county extension directors at The Pennsylvania State
University.

The conceptual framework for this study has been adapted from the integrated
model of the determinants of job performance by Yoder, Radhakrishna, and Baggett. The
framework (Figure 1-1) shows the relationship of seven dimensions of organizational
culture on perceptions of organizational culture.
Problem Statement

“Knowing the exact culture of Company A and comparing it to the exact culture of Company B ensures a more systematic approach to integration and raises the success ratio by 50%” (Bouchard, 2000, p. 211). Continuing Education and Cooperative Extension at Penn State are two organizations involved in an integrated partnership. Although the Outreach partnership between Continuing Education and Cooperative
Extension has been in existence since 1997, an assessment of organizational culture including perceptions of directors of continuing education, continuing education area representatives, and county extension directors has not been conducted. This research study conducted a cultural assessment of Continuing Education and Cooperative Extension at Penn State.

An assessment and comparison of their organizational cultures will provide a strong indication as to the likelihood of future success of the Outreach partnership according to Bouchard and Pellet (Bouchard, 2000). Analysis of the assessment will provide recommendations to strengthen commonalities, overcome obstacles, and provide research-based insights for Outreach leaders to consider in their strategic planning process.

**Significance of Study**

Since the mid-1990s an increasing number of land-grant universities have reorganized their continuing education, cooperative extension, distance education, and/or public broadcasting units into more integrated university outreach or engagement organizations. The insights and data from the Outreach directors who participated in this study will help facilitate partnership activities for all Outreach units. One statement from Cooperative Extension that supports the significance of this study is that:

The capacity of the Extension model for grass roots engagement is unparalleled, but the communities that Extension serves may be so narrowly defined as to preclude Extension from becoming a credible
partner in university-wide engagement. If Extension is to play a significant role in engagement, its creative thinking and planning must include provisions for partnerships, staffing and funding capacities (National Association of State Universities and Land-Grant Colleges. Extension Committee on Organization and Policy, 2002, p. 2).

Kotter (1996) proposed an eight-stage process for creating major change in organizations. In the context of that model, this researcher contends that culture is not so much a factor that one sets out to change. It is monumentally important, however, to fully understand the culture of an organization to implement a successful change initiative and maintain it over time. The rationale for this current study was to assess the current perceptions of culture in Continuing Education and Cooperative Extension at Penn State. It is important to note that culture change comes at the end of a transformation, not at the beginning. “Culture changes only after you have successfully altered people’s actions, after the new behavior produces some group benefit for a period of time, and after people see the connection between the new actions and the performance improvements” (Kotter, 1996, p. 156).

Assessing the culture of Continuing Education and Cooperative Extension at Penn State and exploring whether there are similarities will lead to insights regarding the long-term success of this partnership.
Research Questions

The purpose of this study was to compare the organizational cultures of Continuing Education and Cooperative Extension at Penn State to assess cultural differences that affect the success of a partnership between these units. Two research questions served to guide this study.

RQ1 – Are there similarities between the organizational cultures of Continuing Education and Cooperative Extension at Penn State?

RQ2 – If so, what variables account for the cultural differences between Continuing Education and Cooperative Extension at Penn State?

The selection of organizational culture as the focus of this study has been supported by the literature. “Organizational culture is one of the major issues in academic research and education, in organization theory as well as in management practice. There are good reasons for this: the cultural dimension is central in all aspects of organizational life” (Alvesson, 2002, p. 1). If knowledge is deemed to be crucial to organizational success and knowledge issues are closely interlinked with organizational culture (Davenport and Prusak, 1998) “knowledge management then partly becomes a matter of cultural management (Alvesson and Karreman, 2001; McDermott, 1999)” (Alvesson, 2002, p. 1).

Limitations

As with most studies, this research study has several limitations. A systematic bias may be evident as a result of the survey participants being limited to those
individuals occupying a narrow band of positions within Continuing Education and Cooperative Extension at a single institution of higher learning. The professional staff positions are directors of continuing education, continuing education area representatives and county extension directors. Also, the coding of the instrument does not permit differentiation between directors of continuing education and continuing education area representatives for the purpose of analysis. The respondents are all members of a distinct population within a single university, which may yield a biased sample. Conducting this study as a one-time assessment is a limitation as is measuring perceptions rather than behaviors. Comparing Continuing Education and Cooperative Extension as organizational units but reporting the results in a competitive perspective, that pits one unit against the other, may also be perceived as a limitation. Therefore, the results of this study can only be applied to this population and may not be generalizable beyond this institution. Also, this researcher was unable to identify any other research studies that examined organizational culture in Outreach organizations in higher education and, thus, did not benefit from the perspective of additional research with this distinct population.

Isaac and Michael (1981, 1995), caution that the use of the scales may contain a bias of variance based on participants consistently over-rating or under-rating. This over/under rating may skew the data. Also, if fewer than 20% of potential respondents participate in the survey, the low response rate may become a limitation of this study. The response rate for this study was 73%; low response rate was not a limitation of this study. Another limitation relates to data collection at a single point in time, which does not allow for changes in perceptions and attitudes over time.
“Questionnaires and individual interview surveys can be the best way to compare and contrast sets of organizations efficiently, but if culture is the researcher’s target, the limitations of these methods for gathering cultural data must be taken seriously. In using a questionnaire or survey instrument, one runs the risk that:

- One will select dimensions to measure that are not relevant or important in terms of the cultural dynamics of a particular organization
- One will measure only superficial characteristics of the culture because survey instruments cannot get at the deeper shared tacit assumptions that define the essence of cultures
- The survey instrument will be neither reliable nor valid, because to validate formal measures of something as deep and complex as cultural assumptions is intrinsically very difficult
- The *patterning* of cultural assumptions into a paradigm cannot be revealed by a questionnaire
- Individual respondents will not be able to answer survey questions reliably because cultural assumptions are tacit
- The questionnaire or survey process, as a very powerful intervention, will have unpredictable consequences for the organization’s normal process (too many researchers gather their data and disappear into their ivory tower without ever considering whether the way in which they gathered the data influenced and possibly upset the organization in which the data were gathered)” (Schein, 2004, pp. 206-207)
For an organization to understand its own strengths, weaknesses, opportunities, and threats and use those data to inform strategic planning, it must study and understand its own culture. This process is not without its problems. There are two major areas of risk to consider - the cultural analysis may not be accurate, and the organization may ignore or refute feedback about its culture (Schein, 2004).

Schein identifies several different research streams that influence how we perceive the concept of organizational culture including, survey research, analytical descriptive, ethnographic, historical, and clinical descriptive. This research study utilizes survey research. From a survey research perspective:

Culture has been viewed as a property of groups that can be measured by questionnaires leading to Likert-type profiles (Hofstede, 1980; Hofstede & Bond, 1988; Kilmann, 1984; Likert, 1967). The problem with this approach is that it assumes knowledge of the relevant dimensions to be studied. Even if these are statistically derived from large samples of items, it is not clear whether the initial item set is broad enough or relevant enough to capture what may for any given organization be its critical cultural themes. Furthermore, it is not clear whether something as abstract as culture can be measured with survey instruments at all (Schein, 1990, p. 110).
Definition of Terms

Several key terms will appear throughout this dissertation. Below, you will find the key terms and definitions.

Culture. “Culture as a concept has had a long and checkered history…In the last several decades it has been used by some organizational researchers and managers to refer to the climate and practices that organizations develop around their handling of people, or to the espoused values and credo of an organization” (Schein, 2004, p. 7).

According to Schein (2004), the culture of a group can now be defined as, “a pattern of basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems” (Schein, 2004, p. 17).

Other researchers provide a variety of definitions including: “Culture can be defined as the shared philosophies, ideologies, values, assumptions, beliefs, expectations, attitudes, and norms that knit a community together” (Kilmann, 1986, p. 89). “Culture is the social energy that drives—or fails to drive—the organization….most of what goes on in an organization is guided by the cultural qualities of shared meaning, hidden assumptions, and unwritten rules” (Kilmann, 1986, p. 92).

Despite the multiple definitions of culture offered in this list, Mats Alvesson posits that:

A glance at even a few works that use the term ‘organizational culture’ will reveal enormous variation in the definitions of this term and even
more in the use of the term ‘culture.’ ‘Culture’ has no fixed or broadly agreed meaning even in anthropology (Ortner, 1984), but variation in its use is especially noticeable in organizational culture studies, partly because of the substantial variation in the purpose and depth of these studies. In addition there is the fact that organizational culture is studied by researchers from various disciplines—for example, management, communication, sociology, psychology, anthropology, and folklore—and with research orientations ranging from the positivistic to the interpretive and the post-modernist (Alvesson, 1993, p. 1).

“It is sometimes held that the best way to investigate ‘corporate culture’ is through interviews with top managers, but the outcome of this approach tends to be a description of the espoused ideology of those managers. Organizational culture and managerial ideology are not the same” (Alvesson, 1993, p. 29).

In Organizational Culture and Leadership (Third Edition) Edgar Schein includes a very thorough exhibit (Table 1-1) listing various categories used to describe culture that has been included here for information.
Cooperative Extension Work. “Extension work is an out-of-school system of education in which adults and young people learn by doing. It is a partnership between the government, land-grant institutions, and the people, which provides service and

Table 1-1: Various Categories Used to Describe Culture.

*Observed behavioral regularities when people interact:* the language they use, the customs and traditions that evolve, and the rituals they employ in a wide variety of situations (Goffman, 1959, 1967; Jones, Moore, and Snyder, 1988; Trice and Beyer, 1993, 1985; Van Maanen, 1979).

*Group norms:* the implicit standards and values that evolve in working groups, such as the particular norm of “a fair day’s work for a fair day’s pay” that evolved among workers in the Bank Wiring Room in the Hawthorne studies (Homans, 1950; Kilmann and Saxton, 1983).

*Espoused values:* the articulated, publicly announced principles and values that the group claims to be trying to achieve, such as “product quality” or “price leadership” (Deal and Kennedy, 1982, 1999).

*Formal philosophy:* the broad policies and ideological principles that guide a group’s actions toward stockholders, employees, customers, and other stakeholders, such as the highly publicized “HP Way” of Hewlett-Packard (Ouchi, 1981; Pascale and Athos, 1981; Packard, 1995).

*Rules of the game:* the implicit, unwritten rules for getting along in the organization; “the ropes” that a newcomer must learn in order to become an accepted member; “the way we do things around here” (Schein, 1968, 1978; Van Maanen, 1979; Ritti and Funkhouser, 1987).

*Climate:* the feeling that is conveyed in a group by the physical layout and the way in which members of the organization interact with each other, with customers, or other outsiders (Ashkanasy, Wilderom, and Peterson, 2000; Schneider, 1990; Taiguri and Litwin, 1968).

*Embedded skills:* the special competencies displayed by group members in accomplishing certain tasks, the ability to make certain things that get passed on from generation to generation without necessarily being articulated in writing (Argyris and Schon, 1978; Cook and Yanow, 1993; Henderson and Clark, 1990; Peters and Waterman, 1982).

*Habits of thinking, mental models, and linguistic paradigms:* the shared cognitive frames that guide the perceptions, thought, and language used by the members of a group and taught to new members in the early socialization process (Douglas, 1986; Hofstede, 2001; Van Maanen, 1979; Senge and others, 1994).

*Shared meanings:* the emergent understandings created by group members as they interact with each other (as in Geertz, 1973; Smircich, 1983; Van Maanen and Barley, 1984; Weick, 1995).

*“Root metaphors” or integrating symbols:* the ways in which groups evolve to characterize themselves, which may or may not be appreciated consciously but become embodied in buildings, office layout, and other material artifacts of the group. This level of culture reflects the emotional and aesthetic response of members as contrasted with the cognitive or evaluative response (as in Gagliardi, 1990; Hatch, 1990; Pondy, Frost, Morgan, and Dandridge, 1983; Schultz, 1995).

*Formal rituals and celebrations:* the ways in which a group celebrates key events that reflect important values of important “passages” by members, such as promotion, completion of important projects, and milestones (as in Deal and Kennedy, 1982, 1999; Trice and Beyer, 1993).

education designed to meet the needs of the people. Its fundamental objective is the development of the people” (Kelsey & Hearne, 1963, p. 1).


**Continuing Education.** Continuing Education is the unit at Penn State that offers courses “at the pre- or post-baccalaureate levels to students with at least a high school diploma or its equivalent attending on a less-than-full-time basis. Study can be for credit or non-credit, degree or non-degree, certificate or some other generally recognized educational credential” (Association, 2002, p. 112).

The Outreach unit, Penn State Continuing Education, comprises several major and diverse teaching and delivery units: Conferences and Institutes, the Intensive English Communications Program, the Penn State Institute for Justice and Safety, Penn State Continuing Education—University Park, the Technical Communication Certificate Program, Management Development Programs and Services, Shaver’s Creek Environmental Education and Training Center, Alumni Outreach Education, Outreach
Operations and Campus College Continuing Education, and youth programs (Penn State Outreach and Cooperative Extension, 2001).

Continuing education, or the teaching of adults, has occurred since ancient times. However, a modern framework to differentiate pedagogy (framework for teaching youth) from andragogy (framework for adult learners) was not proposed until Malcolm Knowles (1973). “Knowles proposed a framework for adult learners that included new methods of teaching as well as content that built on students’ experiences” (Shoemaker, 1998, p. 10).

**Outreach.** “Outreach is the process of extending the intellectual expertise and resources of the University through teaching, research, and service to address the social, civic, economic, and environmental issues and opportunities of our Commonwealth, nation, and world” (Penn State Outreach and Cooperative Extension, 1998, p. 2). The next section of this chapter will reveal the assumptions inherent throughout this study.

Outreach is also an administrative unit at Penn State. The Outreach organization is the “largest unified outreach organization in American higher education, with a rich history dating back to 1877 and a long tradition of success. Penn State Outreach each year offers more than 2,000 programs and services in collaboration with the academic colleges. More than 1,500 faculty members deliver programs through the University's outreach units—Continuing Education, Cooperative Extension, Distance Education/World Campus, and Penn State Public Broadcasting. Our programs are delivered in all 67 Pennsylvania counties, 50
states, and 80 countries worldwide” (Penn State Outreach, 4/20/05, http://www.outreach.psu.edu/weidemann/).

Assumptions

It is assumed that the appropriate participants will actually receive the web-based survey instrument for this study. The researcher assumes they will have the technological capacity to complete the instrument and submit their results and that each participant will complete the survey conscientiously and truthfully.

In this chapter, the researcher provided an historical perspective of the recent movement toward reorganizing university organizational charts to place Continuing Education and Cooperative Extension in the same Outreach unit, oftentimes at the university level rather than within a particular college. The problem statement was introduced and the significance of the study was explained. The research questions were listed. Limitations to the study were expressed and key terms were defined. Finally, the researcher expressed assumptions that guided the research. The next chapter will provide a review of the literature that support this study.
Chapter 2

REVIEW OF RELATED LITERATURE

The purpose of this study was to assess and compare the organizational culture of Continuing Education and Cooperative Extension at Penn State. This chapter contains a review of the literature related to organizational culture including a review of several other studies of organizational culture. Literature pertaining to Cooperative Extension, Continuing Education, electronic and web-based survey techniques, and the Cultural Health Indicator instrument in particular were also reviewed.

One basis of comparison between Continuing Education and Cooperative Extension was values. The organizational values of Continuing Education, Cooperative Extension, and Outreach shared several parallel characteristics. All three shared the value of being responsive to client or customer needs. Each was committed to excellence. Valuing teamwork and respecting diversity were also common values to these organizations. The printed values of Continuing Education, Cooperative Extension, and Outreach are listed in Figure 2-1.
<table>
<thead>
<tr>
<th>Continuing Education</th>
<th>Cooperative Extension/College of Agricultural Sciences</th>
<th>Outreach</th>
</tr>
</thead>
<tbody>
<tr>
<td>The customer's need is the focus of everything we do.</td>
<td>Excellence and productivity in the scholarship of research, resident education, and extension/outreach.</td>
<td>Convey respect for faculty, students, customers, clientes, partners, and colleagues.</td>
</tr>
<tr>
<td>A commitment to excellence and continuous improvement underlies all of our work.</td>
<td>Creativity, innovation, and openness to change stakeholder engagement and responsiveness to emerging issues.</td>
<td>Recognize the power of learning in transforming lives and organizations. Commit to engaging the learning resources of the University with the needs of society. Learn from our work and act upon our learning.</td>
</tr>
<tr>
<td>We work as a team and treat each other as colleagues.</td>
<td>Access to information and knowledge to facilitate lifelong learning for all Pennsylvania residents.</td>
<td>Empower employees and encourage individual and organizational creativity in advancing the Outreach mission.</td>
</tr>
<tr>
<td>We respect the dignity and worth of each employee and are actively committed to individual growth and development.</td>
<td>Interdisciplinary, cross-functional collaboration and communication to solve complex problems for the common good.</td>
<td>Pursue new directions to meet changing societal needs and institutional expectations.</td>
</tr>
<tr>
<td></td>
<td>Dedication to diversity, multicultural understanding, and cross-cultural competence.</td>
<td>Capture the strength that derives from honoring diverse people, perspectives, and programs; think and act inclusively.</td>
</tr>
<tr>
<td></td>
<td>An atmosphere of mutual respect that promotes listening, openly sharing ideas and viewpoints, and debating issues and concerns.</td>
<td>Value partnerships and teamwork as fundamental and enriching approaches to our work.</td>
</tr>
<tr>
<td></td>
<td>The highest standards of integrity, honesty, shared responsibility, and mutual accountability.</td>
<td>Be open to change and willing to pursue new directions to meet changing societal needs and institutional expectations.</td>
</tr>
<tr>
<td></td>
<td>Commitment to our employees and an environment that nurtures personal and professional growth and development.</td>
<td>Demonstrate ethical and honest behavior in everything we do.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Demonstrate ethical, disciplined, and creative fiscal management of central resources, and an aggressive entrepreneurial spirit, to pursue and implement revenue-producing opportunities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Build a culture that is focused, and determined, and systematically persists in achieving goals in the context of flexible thought and action.</td>
</tr>
</tbody>
</table>

**Figure 2-1:** Organizational values of Continuing Education, Cooperative Extension and Outreach.

**Source:** (Outreach, 2005, p. 14 & 30)
Organizational Culture

The concept of culture was not frequently considered as a research interest prior to 1980. “Organizational culture as a concept has a fairly recent origin” (Schein, 1990, pp. 286-287). Katz and Kahn (1978) refer to several concepts in *The Social Psychology of Organizations*, but did not include culture in their discussion. Perhaps the earliest appearance of the term “organizational cultures” in the academic literature was in Pettigrew’s article, “On studying organizational cultures,” in the Administrative Science Quarterly in 1979 (Hofstede, Neuijen, Ohayv, & Sanders, 1990).

Edgar Schein (1992) linked organizational culture to the ideal of a learning organization. Schein argued that in a world of constant change, organizations have to learn ever faster which calls for a learning culture that functions as “a perpetual learning system” (Schein, 1992, p. 372). According to Schein, “we must remember that cultural assumptions are the product of past successes…and operate as silent filters on what is perceived and thought about” (Schein, 1992, p. 382).

In mature organizations leaders have to find subcultures and pockets of learning and innovation and systematically reward the managers and employees who hold the assumptions that made the innovation possible. It then remains to determine whether or not such innovative behavior leads to success in the external environment and comfort in the internal environment. If it does, a new and innovative culture will gradually be formed (Schein, 1992, p. 373).
The study of organizational culture, according to Schein (1990) grew out of several research streams including survey research, analytical descriptive research, ethnographic methods, historical method, and clinical descriptive or “organization development.” In addition, discovering the roots of the study of culture has been confounded by research in “many different, not necessarily interrelated, scientific disciplines” (Alvesson & Berg, 1992, p. 12).

One distinct research tradition with a profound impact on culture research is known as *The Tavistock School*. Within this psychoanalytically oriented school there seem to have been two lines of thought which later influenced research on culture (Alvesson & Berg, 1992). One line of thought was by Jacques (1951, 1953, 1955), Menzies (1960), and Redl (1942) who conducted research suggesting a close link between social and psychic structures. The other line of thought by Bion (1961), and Berne (1963) led to such concepts as “basic assumptions”, “shared fantasies”, and “collective defense mechanisms” which grew out of this line of research.

Researchers have studied organizational culture from a number of different perspectives by studying the meaning conveyed in beliefs and values (Schein, 1985), behavioral norms and expectations (Cooke & Rousseau, 1988), stories (Martin, Feldman, Hatch, & Sitkin, 1983), rites and ceremonies (Trice & Beyer, 1984), and organizational structures (Kerr & Slocum, 1987)” (Tesluck, 1997, p. 28).

Culture is the social energy that drives – or fails to drive – the organization. To ignore culture and move on to something else is to assume, once again, that formal documents, strategies, structures, and reward systems are enough to guide human behavior in an organization –
that people believe and commit to what they read or are told to do. On the contrary, most of what goes on in an organization is guided by the cultural qualities of shared meaning, hidden assumptions, and unwritten rules (Kilmann, 1986, p. 92).

It is important to distinguish three fundamental levels of culture in organizations: observable artifacts, values, and underlying assumptions (Schein, 1990) Beliefs and values, “often originate from company ‘founders’ whose own beliefs, values, and assumptions provided a basic model of how the organization should operate and be structured. Beliefs and values become enacted and articulated by subsequent leaders (a) through what management pays attention to, measures, and controls; (b) based on how leaders respond to critical situations and crises; (c) as a result of the types of criteria emphasized in the reward, promotion, recruitment, and selection policies; and (d) through leaders’ managerial styles and patterns of behavior” (Schein, 1990).

Figure 2-2 shows levels of culture as per Schein.
All group and organizational theories distinguish two major sets of problems that all groups, no matter what their size, must deal with: (1) survival, growth, and adaptations in their environment; and (2) internal integration that permits daily functioning and the ability to adapt and learn” (Schein, 2004, p. 18). These two problems are particularly applicable to Continuing Education and Cooperative Extension at Penn State. Separately, each unit must concern itself with financing the enterprise either through public funds, tuition, fees for service, gifts, grants, or contracts. Their separate strategic plans must account for changing clientele needs, and they must successfully position themselves in the marketplace amidst myriad competing organizations. At the next level of the
organizational structure, as partners within Penn State Outreach, they are being asked to accommodate internal integration to reduce duplication and enhance service to end users.

Although this researcher found an array of studies about organizational culture, very few studies were discovered that directly related to higher education in general, and fewer still examining continuing education and cooperative extension specifically. Other authors have attested to the dearth of organizational culture studies as well (Kezar & Eckel, 2002; Sckerl, 2002; Uzzo, 2002).

One study of a public organization that was of interest is Walker’s study of the changing organizational culture in the U.S. General Accounting Office between the period 1921 to 1981. While Walker studied policy documents and legislation during that period, valuable information can be gleaned from his study. He stated, “Where these policies or laws are accompanied by fundamental structural alterations which rearrange professional incentives, and thereby professional behavior, then organizational change can be said to have occurred” (Walker, 1986, p. 7). Walker says incremental modifications simply indicate accommodation to new circumstances and do not change culture. He proposes that over time, simple modifications will not keep pace with shifts in the external environment and will spell doom for the organization. In his words, “It [the organization] will ultimately be swallowed whole or in part by another organization, discarded, or condemned to the tidepool existence with many of its constituencies fleeing to other, more lucrative waters” (Walker, 1986, p. 7). True organizational change of the sort Walker suggests is manifested by a change in behavior patterns. “To alter that behavior, an organization’s culture must be transformed. To do that, organizational design must be changed. An organizational design is composed of current and past
arrangements in which agency elites have fashioned to contend with conditions imposed by their environment” (Walker, 1986, p. 8). Figure 2-3

Figure 2-3: A cultural theory for studying change in public organizations.


(Walker, 1986, p. 8)
Walker espouses that organizational culture evolves “during a distinct epoch in the institution’s history” (Walker, 1986, p. 8). Each epoch may span a few years, a decade, or a century during which one leader or group of leaders may dominate. Penn State Outreach has experienced one epoch and is now entering another. The Outreach organization was created under the leadership of Dr. James H. Ryan for the first decade of its existence and is now in the early years of new leadership by Dr. Craig Weidemann.

In another study closely related to this current research study, Berrio and Venezuela (2003) examined the organizational culture of The Ohio State University Extension. Using the Organizational Culture Assessment Instrument based on Cameron and Quinn’s (1999) competing values framework, Berrio and Venezuela sought to describe the dominant culture type of The Ohio State University Extension. They conducted a descriptive-correlational study to explore the organizational culture of Extension when examined by the demographic characteristics for the target population (N=965) which included all Extension personnel (professional, paraprofessional, support staff). Data were collected by a mail questionnaire; they achieved a usable return rate of 68% (n=434). The dominant culture type when examined by all independent variables was the Clan culture. “It is called a clan because of its similarity to a family-type organization….Shared values and goals, cohesion, participativeness, individuality, and a sense of we-ness permeated clan-type firms” (Cameron & Quinn, 1999, p. 36). State personnel had a Hierarchical dominant culture type, while county and district personnel had a dominant Clan culture. As a group community development personnel had a hierarchical dominant culture type; agriculture and natural resources, family and consumer sciences, and 4-H youth development staff had a dominant Clan culture.
Reliability coefficients ranged from .67 to .83 based on the coefficient of internal consistency calculated using Cronbach’s alpha. Although the study applies to one university it may have broader implications to other state university Extension services. Berrio and Venezuela’s study used very similar statistical measures to this current study. The population for their study included the same Cooperative Extension group as this current study and then expanded the population to include the entire census of Ohio State University Extension personnel. They used a mail survey rather than e-mail and a web-based survey instrument however their response rate was comparable to the response rate for this current study. They followed the same survey protocol (Salant and Dillman, 1994) as this researcher.

White (2001) examined the relationship between human efficacy, culture, and perceived organizational effectiveness through a quantitative study of Cooperative Extension organizations in five states (Kentucky, Louisiana, North Carolina, Texas, and Wisconsin). According to White, no previous research had examined how organizational culture and human efficacy beliefs may be related to effectiveness in Cooperative Extension Services. White’s hypotheses state there is a statistically significant, positive relationship between Cooperative Extension professional’s efficacy beliefs, or perceptions of organizational culture, and their perceptions of organizational effectiveness. A total of 1308 professional Extension staff in the five states were surveyed and 845 surveys with complete data were analyzed. The response rate was 65%. The results revealed that perceived organizational effectiveness is explained by the variables in her study. Her study is of particular interest because the survey population and several of the research design elements were similar to this study. Similar to this
current study, White convened an expert panel to review her survey instrument. She then created a pilot test group to confirm that the questions were clearly stated and to document how many minutes were needed on average to complete the survey. White’s survey instrument contained 96 forced-choice items and required approximately 20 minutes to complete. The number of questions and time required closely mirrored those of this researcher’s study. White also used similar statistical measures (Cronbach’s alpha, multivariate regression) to this current study.

Sckerl (2002) also studied culture in a land-grant university to determine the current dominant culture type. The research questions that guided the study sought to understand what differences exist in organizational culture type at various levels of the university structure. She suggested “institutional leaders can use an assessment of culture to identify characteristics and understand the dynamics at play within an organization” (Sckerl, 2002, p. iii). She used the Organizational Culture Assessment Instrument to examine culture in one Midwest university. This is the same instrument, based on the competing values framework, used in several of the studies reviewed in this chapter. A mailed-survey protocol delivered this 24-item instrument with ipsative measures (respondents were asked to distribute 100 points among four scenarios describing the culture types) to 373 university personnel. The respondents returned 195 usable surveys for a response rate of 52.2%. Mean scores were computed for each respondent and subsequently aggregated at the institutional level for analysis. Clan culture received the highest mean scores for three attributes. The highest aggregate mean scores for the six attributes ranged from M=37.73 for management of employees to M=31.33 for dominant characteristics both in the clan culture. Sckerl, along with several other researchers cited
Manzo-Ramos (1997) examined the organizational climate of the North Carolina Cooperative Extension Service. The purpose of his study was to characterize the organizational climate of the North Carolina Cooperative Extension Service as perceived by faculty and staff. He used the Personal Assessment of the Organizational Climate survey instrument to gather data from the entire staff of the North Carolina Cooperative Extension Service (N=1221). The survey instrument included 97 forced-choice Likert-type response items. The demographic categories were very similar to the variables for this current study. The eight organizational climate categories were: formal influence from upper management, formal influence from middle management, formal influence from manager/supervisor, communication, collaboration, organizational structure, work design, and service to the public. A total of 69% of the survey population responded (n=843). Manzo-Ramos (1997) used a descriptive approach and statistical approach to analyze and interpret the data. The statistical approach included correlation analysis, T-tests, and ANOVAs to identify relationships between the independent and dependent variables and individuals’ perceptions. The content analysis included two themes, climate categories and organizational roles/positions. Of the 767 narrative comments analyzed, 57% were unfavorable comments, and 32% were suggestions for improvement or change.

In the most general terms, the overall organizational climate of the North Carolina Cooperative Extension Service was perceived as “healthy” and productive. The limitations of Manzo-Ramo’s study were similar to the limitations of this current study; Likert-type scales use forced-choice responses which may limit some pertinent
information from being collected; the study was neither longitudinal nor a time series and can only represent perceptions at the time they were examined.

Obenchain (2002) examined the relationships of organizational culture type, size and organization type to innovation in institutions of higher education. She also used the Quinn and Cameron’s (1999) competing values framework as a basis for analysis. The study population included 922 accredited, four-year institutions included in the 2001 HEP Higher Education Directory including 334 private independent institutions, 303 private religious-affiliated, and 265 public colleges and universities. The response rate to her study was 48%. She used one-way analysis of variance (ANOVA) to discover statistically significant differences between the mean scores for total innovation on each of the dominant culture types. The mean scores for the culture types ranged from 2.92 to 3.83 with the Clan type having the highest mean (mean=3.83) representing 464 institutions. This compared to 199 institutions with “no dominant” culture type, 126 institutions with a dominant market culture, and 68 institutions with a dominant adhocracy culture. The limitations of this study were similar to most of the other studies in this chapter, they relied on self-assessments to gather data and those data were subjective and retrospective in nature.

Broshar and Jost (1995) studied of the management culture of the Iowa State University Extension, based on the work of Hall (1988), about organizational environments that encourage and support high-level performance. New administrative leadership and a reorganization of the organization due to fiscal crisis prompted the study. The study used Hall’s Quality Potential Assessment to provide a benchmark for future intervention and to diagnose training needs. Their sample included over 200
Extension employees, some selected at random and others by virtue of their position. The majority of managers and staff perceived the predominant management styles as Regulator and Comforter which are akin to patriarchy, and with a very low score for collaboration. It appeared from the study that the management style at Iowa State must change to support higher-level performance of its staff. The Iowa state study started similarly to this current study inasmuch as the researchers surveyed a cross section of Extension staff to gauge the organization’s culture, however theirs was a two-stage process. They followed up with two additional pieces; they measured the perceptions of how the senior Extension management perceived their management style and how their staffs perceived the management style of their direct supervisors in an effort to compare the existing culture to the “conditions necessary to enhance competence” (Broshar & Jost, 1995, p. http://www.joe.org/joe/1995april/a1992.html/).

An Outreach Diversity Climate Study was conducted at Penn State in 2002 to assess the climate for diversity across Outreach. The objective of the study was to monitor progress on diversity issues within Outreach. An online survey instrument was used to collect anonymous responses from all Outreach employees in Continuing and Distance Education, Penn State Public Broadcasting, and their central support units. Cooperative Extension, although an Outreach partner unit at that time was excluded from this climate survey. The sample generated a 57% response rate (n=266) and the external independent research firm that conducted the survey declared a confidence level of 95 +/- 4 percent. Based on five-point Likert-type response scales, 73% of respondents indicated they were satisfied or very satisfied with the diversity climate and only 12% claimed dissatisfaction. The remaining 15% were undecided. One striking statistic compared with
the Outreach culture researcher’s study is the high percentage of respondents stating they are members of underrepresented groups. Twenty-four percent of respondents to the diversity climate survey indicated they are members of underrepresented groups as compared to only one respondent in the Outreach culture study who indicated a race other than white. Some of the difference may be due to the diversity climate survey including more categories for underrepresented groups based on such factors as sexual orientation, etc. Limitations of the diversity climate survey are that Cooperative Extension was not included in the sample. Including Cooperative Extension would have made the study more relevant to this current assessment of organizational culture in Outreach units. This study was of interest because although its focus was on diversity issues, the instrument measured many of the same demographic variables as this current study, Continuing Education staff from the same institution as the population for this current study were included in the sample, and one of the recommendations from the diversity climate survey was to consider conducting focus groups or interviews with staff as a follow up to the survey.

A study by Kezar and Eckel (2002) adopted a two-tiered cultural framework to examine effects of organizational culture on change strategies in higher education. The literature assumes there is a relationship between organizational culture and the change process, however, “there have been few empirical studies examining how institutional culture affects change processes and strategies” (Kezar & Eckel, 2002, p. 436). The research questions guiding the study are: “1) is the institutional culture related to the change process, and how is it related? and 2) are change processes thwarted by violating cultural norms or enhanced by culturally sensitive strategies” (Kezar & Eckel, 2002, p.
The study used case study methodology to analyze six institutions engaged in change initiatives. The researchers gathered data through interviews, document analysis, and observation over four years. The study used an ethnographic approach; participant-observers provided data each semester on open-ended questionnaires. Outside researchers visited the campuses twice a year; they also reviewed and analyzed internal university documents. The results of the study suggest a relationship between institutional culture and change at all six institutions and among every change strategy. Also the change strategies appeared to succeed when they were aligned with the culture. The institutions involved in the study were self-selected which may limit their ability to be fully representative of all universities undergoing comprehensive change. Since most of the data are self-reported, there may have been a bias toward reporting success. The authors indicated a need for future research regarding culture and institutional change. One interesting question not addressed in this study is whether or not there may be instances when cultural norms can be violated during a change initiative? This study of institutional culture in higher education was relevant because of its breadth and the potential for deducing significant parallels between their study of higher education broadly with this current study of culture within a small subset of higher education. In addition, Kezar and Eckel support the notion that “there have been few empirical studies examining how institutional culture affects change” (Kezar & Eckel, 2002, p. 436).

The primary purpose of the study by Smart and St. John (1996) was to determine the nature of the link between culture type and culture strength in a sample of four-year colleges and universities. Deal and Kennedy (1982) and Schein (1992), among others, claim that culture is an important construct to consider when one attempts to improve
organizational performance. Smart and St. John also support the finding that there is a
“lack of a precise definition of the concept and a paucity of empirical evidence
supporting current popular claims” (Smart & St. John, 1996, p. 219). They also state,
“The linkages among types of culture, cultural strength, and organizational effectiveness
have rarely been studied” (Smart & St. John, 1996, p. 220). The objective of the study
was to test the merits of type of culture and strength of culture and any link between
organizational culture and effectiveness. The study uses Cameron and Ettington’s (1998)
two-dimensional typology incorporating four forms of culture: clan, adhocracy,
hierarchy, market. “The relationship between espoused theory and theory in use, the
indicator of cultural strength in the study, is seldom examined in empirical research
because leaders may behave differently than they say they will in a given situation”
(Smart & St. John, 1996, p. 223). The sample included a 46% response rate (n=334) of
717 invited four-year colleges and universities. Surveys were completed by an average of
21 respondents at each institution. A total of 2206 individuals responded for an overall
response rate of 49%. The data were aggregated and analyzed at the institutional level.
The survey instrument, developed by Cameron (1978), included 32 Likert-type response
items and examined nine dimensions of college or university effectiveness. They
measured culture type through “written descriptions of cultural scenarios” (Smart & St.
John, 1996, p. 226) to arrive at the clan, adhocracy, hierarchy, market types. Culture
strength reflects the level of congruence between espoused beliefs and values with
current management practices and policies. The study incorporated a multivariate
analysis of covariance (MANCOVA) design to analyze the interactions between the
independent variables of culture type and culture strength (strong or weak) and the
dependent variables including the nine dimensions of organizational effectiveness. They found statistically significant differences on all nine dimensions of effectiveness for the strong culture types as compared to only two of the nine effectiveness scales for the weak culture types. The findings indicated that whereas strong academic cultures are no more effective than weak cultures, that “an alignment between espoused cultural values and actual management practices is essential to the explanation of, and efforts to improve, organizational performance” (Smart & St. John, 1996, p. 232). The study indicated that the most prevalent culture type in American higher education is the clan form. This finding is also supported by the Berrio study at The Ohio State University Extension. One important finding that may bear on the recommendations for practice from this current study was that “an alignment between espoused cultural values and actual management practices is essential to the explanation of, and efforts to improve, organizational performance” (Smart & St. John, 1996, p. 232).

Smart, Kuh, and Tierney (1997) studied the organizational effectiveness of two-year colleges using Cameron’s (1978, 1986) nine dimensions of organizational effectiveness. The purpose of the study was to examine the relationships between organizational culture, how decisions are made, and the organization’s effectiveness. The sample was identified using a two-stage process. Initially 30 public, two-year colleges were selected at random from the groups’ national membership directory. In the second stage, all full-time administrators and a random sample of full-time faculty were invited to participate in the study (n=1332). The response rate was 54% (n=698), although 639 respondents with complete data were analyzed. Cameron and Ettington’s (1998) model (clan, adhocracy, hierarchy, market) was used in this study as well as in several other
studies reviewed in this chapter. In the analysis, institutional culture factor scores were computed and the dominant culture type was identified for each college. They then calculated the standardized regression coefficients among each of the preexisting conditions, which they labeled exogenous variables (college size, financial health, enrollment health, transfer emphasis, career emphasis, union status), institutional cultures, and decision approaches (rational/collegial or autocratic/political). The results of the study support earlier research that institutional culture, among the other factors, does bear on the organizational effectiveness of higher education institutions. “The findings of this study suggest that the influences of these factors may have been underestimated in the past by not taking into account indirect influences on effectiveness” (Smart, Kuh, & Tierney, 1997, p. 275). A limitation of the study is that only 30 out of 1,200 two-year colleges in the United States were involved. These results should not be used to generalize the findings to all two-year colleges. Also, the study is a snapshot of these institutions at one point in time. An opportunity for further research would be to magnify the study in one or two directions. Future research could include a much larger sample of two-year colleges or a small sample could explore how cultures change over the life cycle of an organization. The experience gleaned from this second study by Smart and colleagues pointed out that the research was but a “snapshot of an organization at a particular point in time” (Smart et al., 1997, p. 274) and a longitudinal perspective may be more helpful to guiding strategic decisions.

Uzzo (2002) compared the organizational culture of two unique subgroups in higher education, the administrators within academic affairs and administrative affairs in selected institutions. He studied these subgroups in three universities, a research
university, a regional university, and a private university. He used the 30-question Organizational Cultural Assessment Questionnaire by Sashkin (1990, 1993) to measure perceptions of culture in five areas of the work environment: managing change, achieving goals, coordinated teamwork, customer orientation, and cultural strength. He sought to understand the comparison between how the staff in each subgroup perceived the culture of their organization. Uzzo’s results for the area of culture strength within the administrative affairs divisions demonstrated no significant difference between institutions. “Comparisons of Alpha to Beta (p=.75, p>.05), Alpha to Gamma (p=.79, p>.05), and Beta to Gamma (p=.66, p>.05) show that there are no significant differences in the means” (Uzzo, 2002, p. 45). Similarly, he found no significant differences within academic affairs divisions. “Comparisons of Alpha to Beta (p=.99, p>.05), Alpha to Gamma (p=.67, p>.05), and Beta to Gamma (p=.74, p>.05) show that there are no significant differences in the means” (Uzzo, 2002, p. 46). However, when examining the area cultural strength, the staffs in the divisions of administrative affairs rank themselves as average, whereas in the divisions of academic affairs, the staffs perceive their cultural strength as high.

Uzzo supports the supposition of other researchers:

Although much has been studied and written about organizational culture, there is a lack of agreement as to its meaning within the field. Because researchers come from different theoretical, epistemological, and methodological perspectives, there has been little commonality among definitions or outcomes in organizational culture research (Frost et al., 1991). However, most agree that culture includes shared beliefs, values,
and assumptions passed on to members in the organizations. (Uzzo, 2002, p. 10).

Silvester, Anderson, and Patterson (1999) used an empirical case study to showcase attributional analysis to quantify perceptions of respondents involved in a longitudinal culture change intervention. Their objective was to explore the similarities and differences regarding perceived causes of success and potential barriers to success of a Total Quality Management change program. As part of a large-scale Total Quality Management intervention in a multinational engineering and manufacturing organization with 30,000 employees, 4,000 engineers were directly involved in the Total Quality Management intervention that was facilitated by twenty full-time trainers and two training coordinators. Twenty-two stakeholders were interviewed and 1,230 distinct causal statements, coded using a modified version of the Leeds Attributional Coding System, were used in the analysis. The number of positive and negative statements, and whether they described actual or hypothetical events, were analyzed and suggested the more positive statements indicated a positive influence on change. This study gave the current researcher a perspective about how one might quantify organizational culture in a large multinational engineering and manufacturing organization.

Hofstede et al. (1990) conducted a study on organizational culture across ten organizations in Scandinavia. Their study measured six independent dimensions of organizational culture. Data were collected from a stratified random sample of the twenty units in the research population as well as interviews of selected informants. The units
studied spanned a range of manufacturing, service and public institutions. A three-phase
design included 180 interviews, a return set of 1,295 surveys with 135 pre-coded
questions, and questionnaires followed by interview with another unique group. The
second phase (survey only) collected data on perceptions of practices, work goals, and
general beliefs. Responses were plotted on a five-point bipolar response scale. Mean
scores for all 135 survey questions varied widely across the twenty units. The differences
were smaller, however, for those questions examining values (M=.32 to 2.09) than for
questions measuring perceptions of practices (M=.68 to 3.22). Based on a five-point scale
the maximal difference in means could be 4.0. The research question, “Can
organizational culture be measured?” was supported. Multivariate analysis was used to
examine the score research question by comparing the mean scores for each of the twenty
units to see the between-unit correlations. Hofstede and colleagues measured culture
through data collected from individuals and then aggregated those data at the unit level
for analysis as did the primary researcher in this current study. They concur that there is a
lack of research studies on organizational culture. They state, “The literature on
organizational culture consists of a remarkable collection of pep talks, war stories, and
some insightful in-depth case studies. There is, we believe, a dearth of ordinary research
as taught by standard behavioral research methodology textbooks” (Hofstede et al., 1990,
pp. 286-287).

Bates et al. (1995) propose a relationship between manufacturing strategy and
organizational culture. They collected survey data from 822 respondents in forty-one
U.S.- owned and Japanese-owned manufacturers in the United States. Their analysis
indicated a relationship between manufacturing strategy and organizational culture. Their
research questions examined whether there was a relationship between manufacturing strategy and organizational culture and if so, how are they linked. They used nine different types of questionnaires among the sample population, however multiple respondents answered all of the perceptual questions. A total of 822 questionnaires were used in the analysis. The level of reliability was measured with Cronbach’s alpha. New scales developed especially for their research had a reliability coefficient of coefficient alpha > 0.6 and coefficient alpha > 0.7 for previously developed scales. In their study a relationship between the two variables was established, however they conclude additional research will be necessary to address several issues. In their study they used the same operational definition of culture, (Schein, 1985), as this researcher.

Smith (2003) used a questionnaire to measure the perceptions about a change effort intending to change organizational culture from 210 managers representing a broad cross-section of North American industry groups. Smith’s aim was to better understand why culture change is so difficult. Seventy-five percent of the projects reviewed included the goal of culture change. Culture change efforts were deemed more likely to succeed when championed by middle managers rather than chief executive officers or chief operating officers. Smith found positive correlations for successful culture projects ranged from .23 to .60 with the strongest correlation being for the factor “change and innovation are rewarded in your organization.” Negative correlations were most frequently failures of leadership. Negative correlations ranged from – .34 for “there didn’t seem to be a plan” to – .58 for “sponsor left.” Culture change initiatives were most likely to succeed where there was a “dedicated, capable project team; visible support from the sponsor; progress tracked and publicized” (Smith, 2003, p. 257). In other words,
success was more likely when there was a high frequency of significantly correlated positive factors in evidence. One limitation of Smith’s study was the small number of projects included in the study. One important finding from Smith’s study was that it was more likely the culture change would be successful when the mid-level managers were perceived to be the sponsors and not the senior-level executives.

Rashid (2004) examined the relationship between organizational culture and employee attitudes toward organizational change. He analyzed 251 questionnaires (response rate of 14.3%) from a population of 1,965 companies in the annual directory of the Federation of Malaysian Manufacturers. Goffee and Jone’s (1998) cultural typology was used to examine organizational culture through twenty-three items measuring two dimensions of organizational culture, sociability and solidarity. The questionnaire used a five-point rating scale ranging from 1 (strongly agree) to 5 (strongly disagree). Interval consistency, measured by Cronbach’s alpha for the two dimensions were .890 and .831, indicating a high degree of internal consistency. The study showed that organizational culture does have an effect on the organizational change process. “This study has provided empirical evidence and suggested that certain types of organizational culture have an effect on attitudes toward potential changes in an organization, which was not known earlier” (Rashid, Sambasivan, & Rahman, 2004, p. 175).

The Rashid study is a good comparison to this current study because it uses a rating instrument with a similar response scale and incorporates similar statistical measures. Rashid’s study did have limitations including the small sample size and its focus on the manufacturing sector. Also the data were measured at the nominal level and not at the interval level which limited the range of statistical analysis techniques.
Suggestions for future study that are also appropriate to this researchers study would be to use a series of follow up interviews to obtain additional perceptions.

**Cooperative Extension**

The literature review for cooperative extension will provide the reader with an overview and general introduction to cooperative extension as an outreach service provider within the land-grant university system.

According to Kelsey and Hearne (1963), the beginnings of extension work grew out of an historical situation and are an important part of American history. “When Abraham Lincoln signed the Morrill Act in 1862, creating the basis for our system of land-grant colleges, it is probable that his deep-seated concern for the common man controlled his actions more than any superhuman vision of the great system of extension education which has come to be envied the world over” (Kelsey & Hearne, 1963, p. 12). Kelsey and Hearne stated that Extension work is largely the result of the working together of two great forces, American agriculture and American education. They meant American education as characterized by Ezra Cornell’s ideal of education for any man or woman in any field (Kelsey & Hearne, 1963). Farmer’s institutes were established throughout the United States in the decades following the Civil War. The institutes were supplanted by a more organized system of agricultural education as expressed by Kenyon Butterfield during the 1904 meeting of the Association of American Agricultural Colleges and Experiment Stations. Butterfield said, “This work will not only be dignified by a standing in the college coordinate with research and teaching of students, but it will
rank as a distinct department with a faculty of men whose chief business is to teach people who can not come to the college” (Kelsey & Hearne, 1963, p. 18). This statement from the 1960’s, reflecting Extension’s response to an expanded scope of work, is still valid nearly a half-century later. “Land-grant tradition demands that Cooperative Extension be useful at the highest level of public need; thus we cannot deny responsibility for this new challenging educational dimension” (New Areas of Land-Grant Extension Education. Report No. 10 of the Center for Agricultural and Economic Adjustment of Ames, Iowa, and the Education Research Associates of Boulder, Colorado, 1962).

The current Outreach mission at Penn State is, “Outreach serves as a catalyst, collaborator, and connector between the needs of our various constituents and stakeholders with the programs, research, and services of Penn State’s colleges and faculty” (Outreach, 2005, p. 14).

The mission of Penn State Cooperative Extension is to extend non-formal outreach educational opportunities to individuals, families, businesses, and communities throughout Pennsylvania. Cooperative Extension education programs enable the Commonwealth to maintain a competitive and environmentally sound food and fiber system and prepare Pennsylvania's youth, adults, and families to enhance the quality of their lives and participate more fully in community decisions.

Legislative action created the Cooperative Extension Service. “The federal acts with basic influence on cooperative extension work are the first Morrill Act of 1862 establishing the land-grant college movement, the second Morrill Act of 1890 providing for further support to land-grant colleges, the Smith-Lever Act of 1914, and the latter as
amended in 1953” (Kelsey & Hearne, 1963, p. 29). Although the common understanding of cooperative extension is its focus on agriculture, a focus on agriculture, to the exclusion of other types of education, was not the intention of the land-grant college movement. “Of the original motives, the strongest was the urge to provide a ‘useful’ form of higher education that would hold some appeal for the so-called ‘industrial classes’” (R. L. Williams, 1991, p. 1). “For some, including many land-grant college presidents, the agricultural orientation was overwrought. Even the father of the legislation, Senator Justin S. Morrill, was reputed to have disparaged the term ‘agricultural.’ He said the word ‘would never have been applied to the institution except that it happened to suit the casual convenience of an index clerk’” (R. L. Williams, 1991, p. 2).

While Cooperative Extension was created through federal mandate it is the single most comprehensive system of nonformal education in the nation. The recent movement of paring Cooperative Extension and Continuing Education into university Outreach is likely to have a profound impact on the future success of both units.

**Continuing Education**

As with the previous section, this review of continuing education will provide an historical context of continuing education in the United States. Penn State introduced continuing education in 1886 by offering a series of lessons for the mechanic arts and engineering. The first correspondence courses for agriculture were made possible by rural free delivery in 1892. Lessons in practical coal mining, offered for the first time in 1893 reached 10,000 Pennsylvania miners prior to 1910. Continuing Education was centralized
in 1935 under the leadership of J. Orvis Keller through correspondence courses, evening courses and technical institutes. Other universities followed Penn State’s lead in centralizing their continuing education efforts. The continuing education off-campus centers created between 1935 and 1959 became the Commonwealth Campus system. In 1996, under the leadership of James H. Ryan, the partnership with Cooperative Extension became Penn State Outreach and Cooperative Extension.

In addition to cooperative extension, “most institutions of higher learning in the United States have some educational program that supplements classes and research on the campus. These services are not to be confused with the cooperative extension work of the land-grant colleges, which is entirely different in legal background, objectives, financing, and the level of instruction” (Kelsey & Hearne, 1963, p. 57).

In most countries in which adult education has appeared in recognizable form, national programs for the education of adults have tended to take on a rather easily definable character….In the United States, on the other hand, the national adult educational program has proliferated almost haphazardly in response to myriad individual needs and interests, institutional goals, and social pressures….the apparent formlessness of the adult educational enterprise in this country has been its major weakness (Knowles, 1994, pp. vii-viii).

Semantically, the term “adult education” can encompass the “process by which men and women continue learning after their formal schooling is completed” (Knowles,
1994, p. viii). It can also describe a “set of organized activities for mature men and women carried on by a wide variety of institutions for the accomplishment of specific educational objectives” (Knowles, 1994, p. viii). Combining the process and the activities of adult education the term also describes a movement or field (Knowles, 1994).

“While adult education during the entire Colonial period (1600-1779) was essentially unorganized and primarily vocational, the seeds of certain institutional forms were planted at this time. And certainly the notion that every person can get ahead if he is willing and works hard—which has so greatly influenced the growth of adult education in this country—began to develop during this period” (Knowles, 1994, p. 4).

From the beginning, extension activities [including continuing education] were expected to be self-supporting to a greater degree than most other university programs—probably because of underlying attitudes on the part of the faculties and administrations that they were an ‘extra’ service of the universities and that adults are able to pay for what they get. Morton found that more than 60 percent of the expenditures for university extension activities came from payment of fees by those using the services in 1951-1952 (Knowles, 1994, p. 87).

In Dyer’s study of evening colleges 96 percent reported that year in and year out their income is greater than their expenditures, and that most of them must turn any excess…over to the general funds of the institution at the end of the year” (Knowles, 1994, p. 87). During the period between 1921-1961 a growing body of research findings
differentiated how adults and undergraduate students were taught. “The classroom procedures of lecture and recitation were increasingly displaced by group discussion, cooperative projects, role playing, case study, and other highly participatory techniques” (Knowles, 1994, p. 89). “During the forty years between 1920 and 1960-under the stimulus of two world wars, a great depression, and a rapidly accelerating pace of change in technological, economic, political, and cultural affairs-adult education became an integral part of the American way of life. Whereas before 1920 the term ‘adult education’ did not appear even in the professional educational vocabulary, by 1960 this term was widely used as a symbol. Indeed, during this period the variegated activities for the education of adults began to become organized into an adult educational field” (Knowles, 1994, p. 154).

Kenyon Butterfield (1932) drew comparisons between cooperative extension and continuing education in the early decades of the twentieth century. He recognized the publicly-supported cooperative extension system as “the most extensive and popular system of rural adult education” this nation is likely to have (Butterfield, 1932, p. 494). When speaking about more formal types of adult education, Butterfield says “progress has been discouragingly slow. Study and correspondence courses were started by one or two agricultural colleges [including Penn State] as many as 35 years ago” (Butterfield, 1932, p. 498). When comparing the terms continuing education and adult education, Butterfield prefers the term continuing education for a very practical reason. He refers to the young people between age 14 and 24 who have finished school, are not yet adults, and need to continue their education. He concluded his article, “Indubitably, abundant provision should also be made for education in the distinctive problems of citizenship,
and in those realms of art, literature, philosophy, that for want of a better designation we call cultural. A cultivated rural people is one of the aims of the everlasting quest for democracy” (Butterfield, 1932, p. 499).

Today at Penn State University, continuing education encompasses the realm of credit and noncredit courses at Penn State’s twenty-four campus locations and in community and business settings. Conferences to extend the scholarly research of faculty, youth camps, environmental education, and distance education, including the Penn State World Campus, are integrated into continuing education. The mission of Continuing Education is to “use a variety of program delivery technologies and methods to connect learner needs with Penn State resources to help individuals transform their lives through education” (Outreach, 2005, p. 53). The next section of this chapter will review the key literature that guided the survey instrumentation and methodology for this study.

**Internet Surveys**

This section of the literature review will provide support for the instrumentation and methodology incorporated in this study. This research study utilized a web-based survey instrument to collect data from the survey population and followed the protocol of perhaps the foremost authority on the design and methodology of surveys, Donald Dillman. Dillman stated that, “Multiple contacts have been shown to be more effective than any other technique for increasing response to surveys by mail (e.g., Scott, 1961; Linsky, 1975; Dillman, 1991)” (Dillman, 2000, p. 149). He continued, “Recent research
confirms that this is also true for surveys by e-mail (Schaefer and Dillman, 1998)” (Dillman, 2000, p. 149). According to Dillman:

Just as multiple contacts are the most important determinant of response in face-to-face, telephone, and regular mail surveys, they are essential for e-mail surveys. A prenotice e-mail message appears to take on somewhat greater importance for e-mail surveys because it is very easy to discard e-mail after reading only a tiny portion of it. The time that elapses between the prenotice and questionnaire should be shortened from one week to two or three days in order to increase the likelihood that the recipient will connect the memory of the first contact with the second. The main purpose of the prenotice is to leave a positive first impression of importance so that the recipient will not immediately discard the questionnaire when it arrives (Dillman, 2000, pp. 367-368).

One important issue is how to address the e-mail message; should it be personalized, sent to a listserv, or with another protocol? Dillman suggested the best route is that, “all sampled individuals should receive an individual e-mail message” (Dillman, 2000, p. 368). Although laborious, it is preferential to send individual e-mails over sending one e-mail message to a long list of recipients due to implications of confidentiality.

An intermediate possibility that avoids the problems of listservs and the disclosure of everyone’s address is to send the e-mail as a bcc (blind
carbon copy) to each name on a list with a general title, for example, “Members of Citizens for Responsible Schools.” No recipient will see the address of any other member and all responses will be sent only to the sender. I know of no experimental evidence available on whether using a general name will decrease response compared with sending the e-mail to individuals, and experimental research is needed on this topic (Dillman, 2000, p. 368).

“Potential respondents may be directed to a Web site that must either be entered manually or be achieved on certain e-mail applications by clicking on an address contained in an e-mail message” (Dillman, 2000, pp. 377-378). A visual screen assuring respondents they have arrived at the right place is also important.

“Inappropriate uses of color represent one of the biggest threats to development of good Web questionnaires. The threat stems partly from the ease with which color can be added to a questionnaire, and the tendency of many Web designers to use it in ways that interfere with the response process, even to the point of influencing visual comprehension and producing potentially invalid answers to certain types of survey questions” (Dillman, 2000, p. 382). “Although most designers use a simple presentation of black letters on a neutral background, questionnaires have appeared on the Web that are composed of blue letters on a bright yellow background, red letters on a green background, and white letters on a black background. The use of colorful backgrounds seems to be based on the idea that potential respondents will find such unusual questionnaires more attractive and will
therefore be more likely to respond, a claim for which there appears to be no experimental support” (Dillman, 2000, p. 382).

One consideration when proposing an e-mail based survey is to ensure the survey population has adequate access to computers and e-mail and the researcher can access their e-mail addresses. This can be viewed in the same light as the a telephone-based survey in 1936, “when the infamous Literary Digest survey used telephone listings for its survey of over a million people and erroneously predicted that Landon would beat Roosevelt in that year’s presidential election. Sampling from telephone directories biased selection in favor of higher income households in which members were more likely to be Republican, thereby producing the wrong prediction for the outcome” (Dillman, 2000, p. 355). At that time only 35% of U.S. households had telephones and the erroneous reports and their fallout may have played a role in delaying the general use of telephone surveys for decades.

Dillman pointed out that mixed–mode surveys may or may not help with response rates. He sites one example where, use of the paper prenotice instead of e-mail lowered the response rate by five percentage points (Dillman, 2000). When sending e-mail reminder notices, “it cannot be assumed in e-mail studies that recipients still have the questionnaire. For this reason, as well as the obvious convenience of having a replacement questionnaire easily available, the normal e-mail reminder includes a replacement questionnaire. The experiment by Schaefer and Dillman (1998) found that inclusion of such a replacement encouraged faster returns and resulted in a higher final response rate (Dillman, 2000).
Responses to open-ended questions may receive more lengthy responses on electronic surveys than paper questionnaires. According to Dillman, “at least one e-mail survey experiment has demonstrated that respondents provide more detailed answers to open-ended questions on computers than they do on paper questionnaires (Schaefer and Dillman, 1998). Web surveys may also elicit longer answers, but research on this possibility is still needed” (Dillman, 2000, p. 399). Dillman also reported:

A four contact e-mail survey strategy in which a response rate comparable to that obtained by postal mail was obtained. In addition, it was noted that it is now possible for the vast majority of computer users to simply click on a highlighted Web address contained in an e-mail message and be transferred to a Web survey. When most people’s e-mail program facilitates such a transparent connection to the Web, I expect there to be little difference in the response rates one can obtain from e-mail versus Web surveys. As reported in this case study, the making of all four contacts by e-mail produced higher response rates than did substituting a paper prenotice or than you/reminder (Dillman, 2000, p. 400).

In his volume *Overcoming Survey Research Problems* for New Directions for Institutional Research, editor Stephen Porter focused on effective ways to improve response rates in surveys in higher education. He cites “falling response rates and the demand for surveys on almost every conceivable subject” (Porter, Spring 2004, p. 1). Dey (1997) “shows that response rates in a set of national student surveys fell from
around 60 percent in the 1960s to just 21 percent in the late 1980s” (Porter, Spring 2004, p. 5).

Why someone fills out a survey often relies on social exchange theory. Three elements are critical for predicting a particular action: rewards, costs, and trust. Simply stated, rewards are what one expects to gain from a particular activity, costs are what one gives up or spends to obtain the rewards, and trust is the expectation that in the long run the rewards of doing something will outweigh the costs. The theory of social exchange implies three questions about the design of a questionnaire and the implementation process: How can we increase rewards for responding? How can perceived costs be reduced? How can trust be established so that the ultimate rewards will outweigh the costs of responding (Porter, Spring 2004, p. 7)?

Many researchers worry that their response rate will fall if they switch from paper to Web surveys, and the results are mixed. A study cited by Mehta and Sivadas (1995) looks at response rate by mode (paper mail and e-mail) found a higher response rate for the paper survey groups, however upon closer examination they discovered there were other differences, in addition to mode that may have contributed to the 20 percentage point difference (Porter, Spring 2004). According to Porter, “a Web survey will be successful only if the population has easy access to the Internet and is comfortable with using the Web, and if the researcher has accurate e-mail addresses” (Porter, Spring 2004,
p. 9). When discussing multiple contacts during a survey, Porter states, “One of the most successful techniques to increase response rates is the use of multiple contacts with members of the sample. This technique was developed and refined by Dillman (2000), and is now considered standard methodology for any survey” (Porter, Spring 2004, p. 10).

The length of a survey form also merits careful consideration. Porter suggests, “Increasing the number of pages from two to eight caused response rates to drop only about 3 to 4 percentage points. A study by Statistics Norway using a large mail survey found that response rates dropped from 63 percent for a two-page questionnaire to 54 percent for an eight-page questionnaire (Haraldsen, Stalnacke, and Fosen, 1999)” (Porter, Spring 2004, p. 12).

On the topic of confidentiality. “Researchers often believe that a statement of confidentiality should be included with a survey to encourage truthful responses and increase response rates (Dillman, Singer, Clark, and Treat, 1996; Singer, von Thurn, and Miller, 1995)” (Porter, Spring 2004, p. 14). It must be noted, however, that in the case of this current research study on organizational culture, there was no option whether or not to include a statement of confidentiality; it was a requirement of the institutional review board.

Coding errors are another area that may introduce error bias into survey results. According to Porter, “Web-based surveys may also reduce errors resulting from coding (Zhang, 1999). In Web-based surveys, responses are already in electronic format and have been coded by the respondent. Few researchers consider the human error in data
entry and scanning, both of which are not involved in Web-based data collection” (Porter, Spring 2004, p. 24).

Another bias may occur in Web-based surveys. “A Web survey can look different depending on a respondent’s Web browser, operating system, screen configuration, and hardware (Dillman, 2000; Dillman and Bowker, 2001). Because of these differences, the survey items may appear different from what was intended by the survey designer. The unintended delivery of unequal stimuli introduces the potential for measurement error” (Porter, Spring 2004, p. 26).

Ethical considerations also come into play with Web-based surveys. “Web-based surveys are mired in ethical issues not often considered by researchers. Protecting participant privacy and confidentiality is a challenge for researchers conducting Web-based surveys (Cho and LaRose, 1999). Many people consider ‘spamming,’ the sending of unwanted e-mails, to be a misuse of technology (Cho and LaRose, 1999; Shannon, Johnson, Searcy, and Lott, 2001). Some even consider mass mailings to large lists of people inviting them to participate in a Web survey to be an invasion of privacy. Reactions to privacy violations on the Web and by e-mail can often be severe because of the limitless boundaries created by the Web. It seems that electronic intrusions violate the privacy of an individual in a way that a letter or a telephone call does not (Cho and LaRose, 1999) (Porter, Spring 2004).

“How many follow-up e-mails should be sent? If no follow up e-mails are sent, one can expect a response rate of less than 30 percent (Cook, Heath, and Thompson, 2000). Some have advocated the use of an initial e-mail notification with two follow-up e-mails (Couper, Traugott, and Lamas, 2001). One study even suggested that four
contacts yield the highest response rate (Schaefer and Dillman, 1998). Much of the decision on the number of contacts depends on who is being surveyed. If individuals in the sample are likely to be sensitive to e-mail contacts, then the researcher should reduce the number of e-mails sent” (Porter, Spring 2004, p. 31).

“E-mails with nonwhite backgrounds and complex graphic designs may suppress response rates” (Porter, Spring 2004, p. 32). “Expect that approximately 10 percent of your target sample will ask questions about the survey” (Porter, Spring 2004, p. 34).

A consideration for surveys that include open-ended questions is how to handle the responses to open-ended questions. “These questions can provide a wealth of detail and insight into the survey topic, but this rich source of information comes at a price: it must be processed and analyzed. The general approach is to have two researchers read each comment and assign it a topic code; these codes can then be analyzed to provide summary information about the open-ended responses” (Porter, Spring 2004, p. 95).

**Cultural Health Indicator**

The particular survey instrument selected for this study is the Cultural Health Indicator (CHI) developed by EMERGE International and used with permission. According to EMERGE International:

Chi as defined by eastern cultures, is known as the life force within us.

The Cultural Health Indicator™ is appropriately named the “CHI” since it clearly defines the life giving force of your organization’s culture (EMERGE International, 2005, p. 2).
This instrument has been validated by Dr. Lloyd Williams (1999) and the validation report in its entirety is included in Appendix B. The Cultural Health Indicator is based on several theories culled from the fields of organizational psychology, social-cultural anthropology, clinical psychology and business systems development. The CHI is “composed of one hundred questions and/or thematic statements that yield the lived experiences of the respondents to the survey” (EMERGE International, 2005, p. 4).

The CHI was validated using a phenomenological historiography process to understand the unique characteristics of 75 managers and 25 executives in one organization. More specifically, the validation study used a Modified Van Kaam Method created by Moustakas (1994). This method was designed to collect and analyze personal stories and narratives to describe “turning-point moments in individuals’ lives” (L. C. Williams, 1999, p. 4). The theme analysis was “intended to determine what characteristics of the congruence model impact cultural health in organizations and people and what factors to not” (L. C. Williams, 1999, p. 5).

A twelve-step process was utilized to design the instrument. It consisted of selecting an appropriate agency from which to collect data. They selected an agency with which they had an ongoing consulting relationship. They then analyzed and reviewed the data and subsequently eliminated extraneous material to identify clusters. Patterns and themes emerged from the data. Although 100 managers and executives were identified as participants in the validation study, the articles studied were their written correspondence. Documents spanning a nine-year period were analyzed to identify pertinent issues from
the managers and executives. The actual data included 898 pieces of correspondence ranging from interview responses to e-mail conversations, to organizational reports.

The researcher dedicated 10 days reviewing the correspondence pieces, which were sorted into categories and listed on spreadsheets. They then developed clusters of statements and key words. The managers and executives were then both required to agree on the categories and confirm the themes.

The researcher used triangulation to measure the results of the instrument. They analyzed a total of 1520 triplets (ten non-overlapping triplets were selected from each tape). They used DEL analysis to test the directionality of the hypothesis. “The higher the DEL coefficient, the stronger the directional effect of the processing characteristics/factors on the group’s mode of processing” (L. C. Williams, 1999, p. 12). The DEL coefficient for the 1520 triplets analyzed was .212 (p<.001). The hypothesis was confirmed. When assessed a second time using 800 triplets, the result was a DEL of .417 (p<.001).

Dr. Williams concluded, “the reliability and validity of the instrument and its findings in two separate utilizations are conclusive” (EMERGE International, 2005, p. 13). “Validity is the characteristic of instrument scores that indicate the instrument is accurately measuring what it is supposed to measure. Reliability is the characteristic of producing consistent measurements over time” (Farmer, 2001, pp. 213-214). “Both reliability and validity are important, but validity is critical” (Farmer, 2001, p. 224). “Internal validity measures whether an experiment is really measuring what the researcher thinks it is measuring. Internal validity poses the question, ‘Did the independent variable make the difference or were there other factors which caused the
dependent variable to vary’” (Farmer, 2001, p. 224)? “External validity asks the question, ‘If a study found a difference with a certain group and setting, is that result generalizable to a larger audience and other settings’” (Farmer, 2001, p. 224)?

The Cultural Health Indicator questions emerged through the process described in general terms in the previous paragraphs summarizing Williams’ validation report. An expert panel representing Penn State Continuing Education and Cooperative Extension reviewed and refined the questions to ensure the wording was applicable and appropriate to higher education. The revised Cultural Health Indicator questions were used in this study.

This chapter included an overview of the literature related to organizational culture including a review of several other research studies of organizational culture in a variety of contexts. An overview of Cooperative Extension and Continuing Education provided additional historical perspective. A review of the most prevalent techniques for conducting survey research and electronic or web-based survey techniques followed. Finally the validation and reliability of the Cultural Health Indicator survey instrument utilized in this research study was supported. The next chapter will provide details of the research methodology of this study.
Chapter 3

RESEARCH METHODOLOGY

The purpose of this study was to assess and compare the organizational culture of Continuing Education and Cooperative Extension at Penn State to understand the compatibility of a partnership between these units.

This chapter will explain the methodology applied to this research study. The research design will be explained, target population defined, and dependent and independent variables will be listed. Human subjects approval from the institutional review board will be acknowledged. The instrument selected for this study will be justified and the data collection process will be outlined. Finally, the source of survey data and the method of analysis will also be explained. This process is supported by the previous research of Struening and Guttentag (1975). They suggested a list of steps to ensure the successful completion, acceptance, and applicability of a research study and these steps were applied during this study.

Research Design

This research used the Cultural Health Indicator survey instrument. The Cultural Health Indicator is a web-based survey instrument with Likert-type rating scales that will be used to gather data from all of the directors and assistant directors of continuing education, continuing education area representatives and county extension directors.
across Pennsylvania to compare and contrast the cultures of each organization. The Cultural Health Indicator, with Likert-type rating scales, produces independent responses to each question, however the individual results will be aggregated at the dimension level for analysis.

**Target Population**

The target population for this study included all of the directors and assistant directors of continuing education, continuing education area representatives and county extension directors at Penn State. This population was selected because these positions are outside of the University Park campus; these positions have managerial/supervisory responsibility within their respective units; and, these positions are perceived by this researcher to be parallel within the organizational chart. Electronic mail addresses were obtained from the associate vice president’s for outreach who direct continuing education and cooperative extension. The total target population for this study included one hundred thirty-five individuals. A survey instrument was distributed to 37 directors and assistant directors of continuing education, 40 continuing education area representatives and 58 county extension directors.

A pilot study of a stratified random sample of ten percent (n=14) left a total of 121 potential respondents for the survey. The pilot study served as a miniaturized walk through of the whole study from sampling to analysis to reporting (Babbie, 1973, p. 211). “Babbie (1998), Fink (1995), and Mangione (1995) recommend that 10 or more people,
who have similar characteristics to the study population, be pilot tested” (Farmer, 2001, p. 248).

The purpose of the pilot study was to further validate the instrument and evaluate the appropriateness of the chosen statistical analyses. The pilot study also served as an indicator of the anticipated response rate. A ten percent random sample of fourteen individuals was asked to participate in the pilot study. The pilot study response rate was seventy-one percent. Isaac and Michael (1981) suggest several advantages of pilot studies. They indicate pilot studies often point out ideas and clues not foreseen prior to the pilot study that enable researchers to revise the study and “greatly increase the chances of obtaining clear-cut findings in the main study” (Isaac & Michael, 1981, p. 34). Pilot studies provide an opportunity to thoroughly check the statistical and analytical procedures which can “greatly reduce the number of treatment errors, because unforeseen problems revealed in the pilot study may be overcome in redesigning the main study” (Isaac & Michael, 1981, p. 35). They conclude, “The less research experience the student has, the more he is likely to profit from the pilot study. Because of this, the student should attempt a pilot study whenever possible, even if it must be limited to only a dozen or so cases” (Isaac & Michael, 1981, p. 35).

**Variables**

The list of dependent variables for the Cultural Health Indicator (Bouchard & Pellet), included leadership, relationships, communication, infrastructure, involvement and decision-making, change management, and finance.
The independent variables included demographic characteristics of the respondents: age, gender, race, level of formal education, years of employment with the organization, years of service in current position, and work unit.

**Human Subjects**

Approval from the institutional review board was secured concerning the use of human subjects for this research proposal titled, “Continuing Education and Cooperative Extension: A Comparative Assessment of Organizational Culture.” This research proposal is identified as IRB #19534. The approval expiration date is September 1, 2005. The authorizing statement from the institutional review board is included in Appendix C.

**Instrumentation**

To conduct this study an appropriate survey instrument was sought throughout the literature. No survey ideally suited to this study was indicated in the Buros Mental Measures Yearbook. Through the advice of Dr. William Rothwell, this researcher contacted Ms. Lizz Pellet at EMERGE International. Ms. Pellet introduced the researcher to the Cultural Health Indicator. The Cultural Health Indicator measures perceptions of organizational culture through a web-based survey. As mentioned previously, this survey instrument consisted of 98 Likert-type questions covering broad categories of organizational culture. Three open-ended questions were also included to provide respondents an opportunity to contribute additional comments. The following scale was
used with each Likert-type question: 1=Strongly Agree; 2=Agree; 3= Not Sure, 4=Disagree, 5=Strongly Disagree.

The cultural dimensions examined by the Cultural Health Indicator instrument are included in Table 3-1.

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<td>Change Management</td>
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<tr>
<td>Finance</td>
</tr>
</tbody>
</table>

For the sake of brevity and because there were no significant differences between items within dimensions, data analysis was performed on the seven broad dimensions rather than on the 98 individual survey items. The process included grouping related questions together under each of the seven categories. This allowed for categories to be identified and to allow for less confusion in reporting seven categories rather than 98 individual questions (Gerity, 1999).
The Cultural Health Indicator has been evaluated and validated by Dr. Lloyd C. Williams, D. Min., Ph.D. In his validation report (1999) Williams states, “The Cultural Health Index is predicated on a series of theories present in the fields of Organizational Psychology, Social-Cultural Anthropology, Clinical Psychology and Business Systems Development” (L. C. Williams, 1999, p. 1). The Cultural Health Index is a modified survey and phenomenological inquiry instrument. “The Cultural Health Index is composed of one hundred questions and/or thematic statements that yield the lived experiences of the respondents to the survey” (L. C. Williams, 1999, p. 4).

“Content validity is the extent to which an empirical measurement reflects a specific domain of content (Carmines & Zeiler, 1979). In other words, are researchers measuring what they believe they are measuring? Determination of content validity may be approached in several ways (Cooper & Emory, 1995; Dillman, 1978). There are no agreed upon requirements for pre-testing. Instead, each researcher has his or her own way for determining content validity” (Gerity, 1999, p. 72).

Moustakas (1994) stated “perception is regarded as the primary source of knowledge, the source that cannot be doubted. Intentions, united with sensations, make up the full concrete act of perceptions” (Moustakas, 1994, p. 52).

For the purpose of reviewing the survey instrument for this study, an expert panel was convened to confirm the content of the instrument was appropriate for and would be understood by the intended survey population. The panel consisted of four experts in the field including Mr. James F. Campbell, Director of Outreach Operations; Dr. William G. Curley, Senior Director of Statewide Continuing Education; Dr. G. Michael McDavid, Regional Director for Cooperative Extension and Outreach; and Mr. David T. Rynd,
Regional Director for Cooperative Extension and Outreach. The criteria for expert panel selection were:

- Must have a thorough understanding of at least one key organization, continuing education or cooperative extension.
- Must currently be in a management/leadership position in an organization key to this study.

During the expert panel phase of this study, the instrument was provided to each expert panelist. Each panelist independently assessed each question (Cooper & Emory, 1995) to determine its appropriateness for higher education. The instructions given to each expert panelist included:

- Please read every question on the survey.
- Delete any question that is not appropriate for higher education.
- Add any question you feel should have been asked and was not.
- Indicate whether or not all questions are clear.
- Provide three open-ended questions to be included in the survey.
- Share additional suggestions.

Table 3-2 contains the reliability values (Chronbach’s alpha) for the dimensions of culture.
When testing reliability for multiple choice response scales, such as a Likert-type scale, Cronbach’s alpha is one of the most common indices to measure inter-item reliability. The alpha scores range from 0.0 to 1.00. The lowest alpha for any of the seven dimensions of culture was .83. This indicates all of the scales had strong inter-item reliability (Farmer, 2001).

“If each item on the test has multiple choices, such as a Likert scale, then Cronbach’s alpha is the method of choice to determine inter-item reliability. Cronbach’s alpha is the most commonly used index of reliability in the area of educational and psychological research (Daniel & Witta, 1997), in part because it takes only one administration of the instrument and can be done using the data from the actual study” (Farmer, 2001, p. 241).

Table 3-2: Summary of Reliability Values for Each of Seven Dimensions of Culture

<table>
<thead>
<tr>
<th>Dimension</th>
<th>N</th>
<th>Number of Items</th>
<th>Cronbach’s Alpha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership</td>
<td>98</td>
<td>15</td>
<td>.906</td>
</tr>
<tr>
<td>Relationships</td>
<td>98</td>
<td>14</td>
<td>.869</td>
</tr>
<tr>
<td>Communication</td>
<td>96</td>
<td>9</td>
<td>.831</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>96</td>
<td>16</td>
<td>.910</td>
</tr>
<tr>
<td>Involvement &amp; Decision Making</td>
<td>96</td>
<td>14</td>
<td>.909</td>
</tr>
<tr>
<td>Change Management</td>
<td>96</td>
<td>17</td>
<td>.922</td>
</tr>
<tr>
<td>Finance</td>
<td>96</td>
<td>13</td>
<td>.899</td>
</tr>
</tbody>
</table>
Data Collection Process

A modified version of the electronic survey research methodology outlined by Dillman (2000) was used for this research project. A cover letter signed by the vice president for Outreach at Penn State explained that the respondent was important to the success of the study. The letter served to alert the respondent that the primary researcher would contact them via electronic mail in two days and direct the respondent to a web-based survey instrument. The initial e-mail message from the researcher included the full informed consent form for social science research as approved by the Institutional Review Board on October 26, 2004. In the informed consent form participants were also informed that their responses were voluntary and confidential. In fact, the survey protocol was designed so that responses were actually anonymous. The researcher did not code the instruments and cannot connect responses to individual participants.

The researcher has worked for one of the units that is the focus of this study for twelve years. As a result of his employment status, most of the respondents knew the researcher. Since a professional relationship existed, e-mail letters were sent to each individual’s university e-mail address. As Dillman (1978) suggested, the cover letter was e-mailed from the office of the vice president for Outreach on a Monday.

Two days after the original mailing, a follow-up e-mail was sent from the researcher including the Internet URL where the web-based survey was hosted. The user name and password for this survey were also included in this, and subsequent e-mail correspondence. Seven days after the first e-mail from the researcher the first reminder was sent to all respondents as a friendly reminder to complete the web-based survey.
The Cultural Health Indicator instrument was administered, via electronic mail, to all of the directors and assistant directors of continuing education (n=37), continuing education area representatives (n=40) and county extension directors (n=58) at Penn State. The total population included 135 names. After the pilot study, there were 121 names remaining. A total of 10 individuals responded to the pilot study for a response rate of 71%. Eighty individuals of the remaining 121 names responded to the main survey for a response rate of 66%. At the request of the primary researcher’s advisor and doctoral committee, a post-study sample of nonrespondents was also conducted. The researcher placed telephone calls to a random sample of 43 individuals to ascertain whether or not they had an opportunity to complete the survey. Ten individuals indicated they had not yet participated in the survey and agreed to participate in the post-survey of
nonrespondents. In actuality, eight of those then did respond. One individual indicated he/she had not participated in the survey and declined to participate in the post-test. Thirty-two indicated they had already participated in the survey.

Data analysis was conducted independently for the pilot study, main survey, and survey of nonrespondents to determine if there were any differences between the three groups. A summary of respondents and response rates is displayed in Table 3-3

<table>
<thead>
<tr>
<th>Survey Group</th>
<th>N</th>
<th>n</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot Survey</td>
<td>14</td>
<td>10</td>
<td>71.43%</td>
</tr>
<tr>
<td>Main Survey</td>
<td>121</td>
<td>80</td>
<td>66.12%</td>
</tr>
<tr>
<td>Survey of Nonrespondents</td>
<td>10</td>
<td>8</td>
<td>80.00%</td>
</tr>
<tr>
<td>Overall</td>
<td></td>
<td></td>
<td>72.59%</td>
</tr>
</tbody>
</table>

**Method of Analysis**

A web-based survey instrument that measures perceptions of organizational culture was distributed in accordance with the Dillman protocol and with the concurrence of the Penn State University institutional review board. This survey instrument used Likert-type rating scales to gather data from the directors and assistant directors of continuing education, continuing education area representatives and county extension directors across Pennsylvania to compare and contrast the cultures of each organization. A Likert scale is the most common alternative rating scale. In this Likert scale,
respondents rated every question in each section of the survey instrument on a 1 to 5 scale ranging from strongly agree to strongly disagree. “In a Likert format, each response is assumed to be independent” (Cameron & Quinn, 1999, p. 144).

The Cultural Health Indicator instrument consisted of a questionnaire that contained 98 forced-choice questions. Questions fell under one of seven broad categories designed to assess a key dimension of organizational culture. The categories included: leadership, relationships, communication, infrastructure, involvement and decision-making, change management and finance. Three open-ended questions were also incorporated into the survey to afford respondents an opportunity to divulge additional perceptions about Outreach at Penn State.

Quantitative Analysis

Ordinal level data was collected from individuals; however, the use of summed scores for the dimensions allows the data to be treated as interval level data and treated and reported at that level for the purposes of analysis. This study incorporated the use of Cronbach’s alpha as a statistical measure to gauge the reliability of the questions in the survey. A reliability coefficient of .70 or higher is considered “acceptable” in most Social Science applications.

The original concept for this study was to use Chi square and Cramer’s V to examine whether a statistical relationship existed between two variables. Chi square can be used for tables with any number of columns and rows. When both variables are quantitative (age and time a person has been in his current position), Chi square yields the
linear-by-linear association test. When both variables are nominal (no intrinsic order, such as Female, Male or White, African American, Hispanic) one can select Cramer’s V. For example, the research study could have used Chi square and Cramer’s V to examine whether there was any relation between gender and unit or to see whether there was any relation between age and time a person has been in his/her current position.

One key question of this research was to investigate how the organizational cultures of Continuing Education and Cooperative Extension compare based on the different dimensions of culture. The appropriate statistical measure to employ for this comparison was Analysis of Variance. One uses the ANOVA statistical analysis to compare more than two means at once (with two means, one would use the t test). The advantage of ANOVA is that one can make as many comparisons as one wants within a single analysis. However, this researcher planned to measure one dimension at a time so as to not use MANOVA (multivariate ANOVA) which makes the analysis more complicated without much difference in gain.

During the final analysis it became apparent that the most appropriate statistical measure to apply to Research Question 2 was multiple regression. One-way ANOVAs were the anticipated measure, however the more comprehensive regression analysis ruled out the statistical significance of the relationships and change management dimensions, leaving infrastructure as the only dimension with a statistically significant relationship when examined by organization represented.
Qualitative Analysis

The three open-ended questions provided narrative boxes to gather as much text as respondents chose to share in response to each question. The responses of all respondents for Question 1 were combined into a separate text file. Moving the narrative responses to a separate text file disassociated the responses from the individual respondents. A similar process was repeated for Question 2 and Question 3. NVivo software aided the open coding of these qualitative data elements. A total of 370 coded nodes for Question 1 and Question 2 were aligned with one or more of 27 themes. The analysis for Question 3 has been purposefully omitted from this thesis. The major themes that emerged from the data for Question 1 were positive leadership, hope, new directions, and collaborations. The major themes that emerged from the data for Question 2 included financing ideas, streamlining the organization, teamwork, and decision-making.

In this chapter the researcher explained the methodology employed in this research study, including the research design, target population, variables, supported human subjects approval, justified the survey instrument used in this study, identified the source of all data and methods of analysis. Chapters four and five will describe the results of, and conclusions drawn from, this research study.
Chapter 4

RESULTS

The purpose of this study was to assess and compare the organizational cultures of Continuing Education and Cooperative Extension at Penn State University. This chapter includes the results of the statistical analysis and reports information about how staff in the positions of directors of continuing education, continuing education area representatives, and county extension directors (N=135) perceived the culture of the organization in which they worked on a daily basis.

When comparing the demographics of all respondents the only dramatic difference between Continuing Education and Cooperative Extension was level of education. More Cooperative Extension respondents held Masters degrees (57%) than Continuing Education respondents (46%), however more Continuing Education personnel held Bachelors (67%) and doctoral (89%) degrees than Cooperative Extension. Table 4-1 shows the demographic profile of respondents by organization.
### Table 4-1: Demographic Profile of Respondents by Organization Represented

<table>
<thead>
<tr>
<th></th>
<th>Continuing Education</th>
<th></th>
<th>Cooperative Extension</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
<td>Row %</td>
<td>Count</td>
<td>Row %</td>
</tr>
<tr>
<td>Male</td>
<td>23</td>
<td>52.3%</td>
<td>21</td>
<td>47.7%</td>
</tr>
<tr>
<td>Female</td>
<td>32</td>
<td>59.3%</td>
<td>22</td>
<td>40.7%</td>
</tr>
<tr>
<td>White</td>
<td>55</td>
<td>56.7%</td>
<td>42</td>
<td>43.3%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>0</td>
<td>0.0%</td>
<td>1</td>
<td>100.0%</td>
</tr>
<tr>
<td>34 yr. or younger</td>
<td>2</td>
<td>100.0%</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>35-54 yr of age</td>
<td>41</td>
<td>56.9%</td>
<td>31</td>
<td>43.1%</td>
</tr>
<tr>
<td>55 yr or older</td>
<td>12</td>
<td>52.2%</td>
<td>11</td>
<td>47.8%</td>
</tr>
<tr>
<td>Bachelors degree</td>
<td>10</td>
<td>66.7%</td>
<td>5</td>
<td>33.3%</td>
</tr>
<tr>
<td>Masters degree</td>
<td>31</td>
<td>45.6%</td>
<td>37</td>
<td>54.4%</td>
</tr>
<tr>
<td>Doctoral degree</td>
<td>8</td>
<td>88.9%</td>
<td>1</td>
<td>11.1%</td>
</tr>
</tbody>
</table>
Continuing Education had three times as many personnel with five years or less in their current position (58%) vs only 21% of Cooperative Extension personnel new to their positions. However, Cooperative Extension had considerably more staff who have been in their current positions six or more years (79%) compared to 42% of Continuing Education who have been in their current position for the same range of years.

Similarly, over one third of Continuing Education personnel are new to the organization (35%) as compared to only 5% of Cooperative Extension staff who have five years or less in the organization. Conversely, 95% of Cooperative Extension staff have worked in the organization for 6-15 years; over half (54%) have been in the organization 16 years or more as compared to less than one third of Continuing Education staff (29%). Further study is warranted to examine the effect of length of tenure of the workforce on the health of an organization’s culture. Table 4-2 shows the experiential profile of respondents by organization.

<table>
<thead>
<tr>
<th></th>
<th>Continuing Education N=55</th>
<th></th>
<th>Cooperative Extension N=43</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
<td>Row %</td>
<td>Count</td>
<td>Row %</td>
</tr>
<tr>
<td>Current position 5 yr or less</td>
<td>32</td>
<td>58.2%</td>
<td>9</td>
<td>20.9%</td>
</tr>
<tr>
<td>Current position 6-15 years</td>
<td>19</td>
<td>34.5%</td>
<td>23</td>
<td>53.5%</td>
</tr>
<tr>
<td>Current position 16 or more years</td>
<td>4</td>
<td>7.3%</td>
<td>11</td>
<td>25.6%</td>
</tr>
<tr>
<td>In organization 5 yr or less</td>
<td>19</td>
<td>34.5%</td>
<td>2</td>
<td>4.7%</td>
</tr>
<tr>
<td>In organization 6-15 yrs</td>
<td>20</td>
<td>36.4%</td>
<td>18</td>
<td>41.9%</td>
</tr>
<tr>
<td>In organization 16 or more yrs</td>
<td>16</td>
<td>29.1%</td>
<td>23</td>
<td>53.5%</td>
</tr>
</tbody>
</table>
This chapter also identified the seven dimensions of organizational culture studied. The section on Research Question One (RQ1) reports findings about differences in culture perceptions by organization and the section on Research Question Two (RQ2) reports factors influencing differences in those perceptions. Qualitative responses indicating respondents’ perceptions regarding the organization in response to three open-ended questions are also included in this chapter.

### Dimensions of Organizational Culture

Respondent perceptions were measured in seven key dimensions of organizational culture – leadership, relationships, communication, infrastructure, involvement and decision making, change management, and finance. The descriptive statistics for the key dimensions of organizational culture in Table 4-3 show a summary of the descriptive statistics for all seven dimensions of culture compared by organization. The seven key dimensions of organizational culture were measured using the Cultural Health Indicator, a web-based survey instrument composed of 98 items using a five-point Likert-type rating response scale. Cooperative Extension respondents had lower Mean scores for five of the seven culture dimensions indicating stronger agreement with the survey statements. Continuing Education respondents had lower Mean scores for the dimensions of leadership and finance. Figure 4-1 shows the same summated mean values in graphic format. While not statistically significant, the overall difference in mean values illustrates a remarkable difference between Continuing Education and Cooperative Extension.
Alternative visualizations of these distinctions is evident in Figure 4-2, Figure 4-3, and Figure 4-4.

Table 4-3: Summary Descriptive Statistics for Seven Culture Dimensions by Organization Represented

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Organization</th>
<th>N</th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>Standard Error</th>
<th>95% Confidence Interval for Mean</th>
<th>Low Mean Value</th>
<th>High Mean Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Continuing Education</td>
<td>55</td>
<td>2.4182</td>
<td>.59814</td>
<td>.08065</td>
<td>2.2565 to 2.5799</td>
<td>1.33</td>
<td>4.13</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>43</td>
<td>2.5845</td>
<td>.59590</td>
<td>.09087</td>
<td>2.4011 to 2.7679</td>
<td>1.20</td>
<td>4.27</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>98</td>
<td>2.4912</td>
<td>.59984</td>
<td>.06059</td>
<td>2.3709 to 2.6114</td>
<td>1.20</td>
<td>4.27</td>
</tr>
<tr>
<td></td>
<td>Continuing Education</td>
<td>55</td>
<td>2.1312</td>
<td>.58978</td>
<td>.07953</td>
<td>1.9717 to 2.2906</td>
<td>1.21</td>
<td>4.00</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>43</td>
<td>1.9701</td>
<td>.40891</td>
<td>.06236</td>
<td>1.8443 to 2.0959</td>
<td>1.07</td>
<td>2.86</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>98</td>
<td>2.0605</td>
<td>.52201</td>
<td>.05273</td>
<td>1.9558 to 2.1652</td>
<td>1.07</td>
<td>4.00</td>
</tr>
<tr>
<td>Communication</td>
<td>Continuing Education</td>
<td>54</td>
<td>2.5905</td>
<td>.67563</td>
<td>.09194</td>
<td>2.4061 to 2.7749</td>
<td>1.33</td>
<td>4.67</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>42</td>
<td>2.3122</td>
<td>.41373</td>
<td>.06384</td>
<td>2.1382 to 2.4411</td>
<td>1.33</td>
<td>3.44</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>96</td>
<td>2.4681</td>
<td>.58976</td>
<td>.06019</td>
<td>2.3493 to 2.5882</td>
<td>1.33</td>
<td>4.67</td>
</tr>
<tr>
<td></td>
<td>Continuing Education</td>
<td>54</td>
<td>2.8484</td>
<td>.65479</td>
<td>.08911</td>
<td>2.6697 to 3.0211</td>
<td>1.63</td>
<td>4.31</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>42</td>
<td>2.3839</td>
<td>.43990</td>
<td>.06788</td>
<td>2.2468 to 2.5210</td>
<td>1.50</td>
<td>3.44</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>96</td>
<td>2.6452</td>
<td>.61348</td>
<td>.06261</td>
<td>2.5209 to 2.7695</td>
<td>1.50</td>
<td>4.31</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Continuing Education</td>
<td>54</td>
<td>2.4590</td>
<td>.73561</td>
<td>.10010</td>
<td>2.2582 to 2.6598</td>
<td>1.29</td>
<td>4.57</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>42</td>
<td>2.1990</td>
<td>.46840</td>
<td>.07228</td>
<td>2.0530 to 2.3449</td>
<td>1.07</td>
<td>3.36</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>96</td>
<td>2.3452</td>
<td>.64295</td>
<td>.0662</td>
<td>2.2150 to 2.4755</td>
<td>1.07</td>
<td>4.57</td>
</tr>
<tr>
<td>Change Management</td>
<td>Continuing Education</td>
<td>54</td>
<td>2.7560</td>
<td>.66878</td>
<td>.09101</td>
<td>2.5734 to 2.9385</td>
<td>1.06</td>
<td>4.18</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>42</td>
<td>2.5294</td>
<td>.51511</td>
<td>.07948</td>
<td>2.3689 to 2.6899</td>
<td>1.47</td>
<td>4.12</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>96</td>
<td>2.6569</td>
<td>.61385</td>
<td>.06265</td>
<td>2.5325 to 2.7812</td>
<td>1.06</td>
<td>4.18</td>
</tr>
<tr>
<td></td>
<td>Continuing Education</td>
<td>54</td>
<td>2.5399</td>
<td>.67945</td>
<td>.09246</td>
<td>2.3544 to 2.7253</td>
<td>1.23</td>
<td>4.38</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension</td>
<td>42</td>
<td>2.6190</td>
<td>.56064</td>
<td>.08651</td>
<td>2.4443 to 2.7938</td>
<td>1.31</td>
<td>3.77</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>96</td>
<td>2.5745</td>
<td>.62830</td>
<td>.06413</td>
<td>2.4472 to 2.7018</td>
<td>1.23</td>
<td>4.38</td>
</tr>
</tbody>
</table>

a. Response scale: 1=strongly agree; 2=agree; 3=neutral; 4=disagree; 5=strongly disagree
A summary of the mean values of each of the seven dimensions of culture appear in Figure 4-1.

Figure 4-1: Summated dimension mean values by organization represented.
Table 4-4 shows the ANOVA results for the respondents’ perceptions of the seven dimensions of organizational culture.

Table 4-4: Analysis of Variance Results Examining Respondents’ Perceptions for Seven Organizational Culture Dimensions by Organization of Respondent

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Sum of Squares</th>
<th>df</th>
<th>Mean Square</th>
<th>F</th>
<th>p</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between Groups</td>
<td>.668</td>
<td>1</td>
<td>.668</td>
<td>1.872</td>
<td>.174</td>
</tr>
<tr>
<td>Within Groups</td>
<td>34.234</td>
<td>96</td>
<td>.357</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>34.901</td>
<td>97</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationships</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between Groups</td>
<td>.626</td>
<td>1</td>
<td>.626</td>
<td>2.329</td>
<td>.130</td>
</tr>
<tr>
<td>Within Groups</td>
<td>25.806</td>
<td>96</td>
<td>.269</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>26.432</td>
<td>97</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between Groups</td>
<td>1.831</td>
<td>1</td>
<td>1.831</td>
<td>5.513</td>
<td>.021</td>
</tr>
<tr>
<td>Within Groups</td>
<td>31.211</td>
<td>94</td>
<td>.332</td>
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</tr>
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<td>Total</td>
<td>33.042</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Infrastructure</td>
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<td></td>
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<td>Between Groups</td>
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<td>15.626</td>
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<td>Within Groups</td>
<td>30.658</td>
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<td>.326</td>
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<td>Total</td>
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<td>95</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Involvement &amp;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision Making</td>
<td>1.597</td>
<td>1</td>
<td>1.597</td>
<td>3.985</td>
<td>.049</td>
</tr>
<tr>
<td>Between Groups</td>
<td>37.675</td>
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<tr>
<td>Within Groups</td>
<td>39.272</td>
<td>95</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Change Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between Groups</td>
<td>1.213</td>
<td>1</td>
<td>1.213</td>
<td>3.297</td>
<td>.073</td>
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<tr>
<td>Within Groups</td>
<td>34.584</td>
<td>94</td>
<td>.368</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>35.797</td>
<td>95</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between Groups</td>
<td>.148</td>
<td>1</td>
<td>.148</td>
<td>0.373</td>
<td>.543</td>
</tr>
<tr>
<td>Within Groups</td>
<td>37.354</td>
<td>94</td>
<td>.397</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>37.502</td>
<td>95</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Additionally, three open-ended questions were asked to offer respondents an opportunity to divulge additional perceptions about organizational culture. The three open-ended questions were: 1) What are the three things that excite you about what is currently going on in your organization?; 2) Please complete the following statement – We would be more successful if we …?; and 3) If you were vice president of Outreach for the day, what is the one thing that you would change and how?

Data were collected and compared among three survey groups. The first survey group, the pilot-test group, consisted of a stratified random sample of ten percent of the survey population. The second survey group included everyone in the survey population (90% of that population) that was not already included in the pilot-test group. The final survey cohort consisted of a ten percent sample of non-respondents. Because the web-based survey instrument did not include any participant identifier code the primary researcher placed telephone calls to a randomly selected sample of the survey population to identify non-respondents and asked them to complete the survey at that time.

The separate statistical analyses of each survey group yielded no significant differences between the three survey groups for any of the seven culture dimensions and the data were collapsed into a single survey group for all further analysis.
Differences in Culture Perceptions by Organization

Research Question 1

*Are there similarities between the organizational cultures of Continuing Education and Cooperative Extension at Penn State University?*

The results for research question one were based on the means for each of the seven culture dimensions. The specific statistical analyses for those dimensions where statistical differences were found are presented first. The final section of the findings for research question one indicates which dimensions resulted in no statistically significant differences.

Figure 4-2 shows the overall summary of perceptions of organizational health for the entire survey population on a scale of healthy, neutral, unhealthy. An assessment of “healthy” includes all responses that strongly agreed or agreed with the survey statements. A “neutral” assessment included all responses captured in the “not sure” category. An “unhealthy” assessment shows the “disagree” or “strongly disagree” survey responses. When Continuing Education and Cooperative Extension responses were combined 55% of respondents perceived the organizational culture to be healthy, five percent felt the culture was unhealthy, and 40% were not sure.

Whenever the percentage of neutral responses is high it may indicate respondents are uncertain or confused about the structure of their organization. Neutral responses may also indicate respondents’ distrust of organizational leadership, or distrust about how the survey results will be utilized. If neutral responses are selected out of distrust, the respondents may actually have stronger feelings but opt for the safe “neutral” choice.
Figure 4-2: Summary of perceptions by all respondents of organizational health category.
When examining the overall responses for Continuing Education, respondents are almost evenly divided between perceiving the organizational culture as healthy and not being sure if the culture is healthy or unhealthy. Over seven percent felt the culture was unhealthy. Figure 4-3 shows perceptions of organization health by Continuing Education representatives.

Figure 4-3: Summary of organizational health by Continuing Education representatives.
The chart illustrating the perceptions of cultural health as perceived by Cooperative Extension respondents is more positive than the chart illustrating perceptions of organizational health by Continuing Education respondents. Nearly two-thirds of Cooperative Extension staff indicated a healthy organizational culture. Two percent felt the culture was unhealthy, and one-third were not sure if the culture was healthy or unhealthy. Figure 4-4 shows the summary of organizational health as perceived by Cooperative Extension representatives.
The summated mean scores in Table 4-5 illustrate that Cooperative Extension personnel had lower means on five of the seven culture dimensions. In relation to the response scale this means County Extension Directors had more positive perceptions for the relationships, communication, infrastructure, involvement and decision making, and change management dimensions. Continuing Education staff had more positive perceptions for the dimensions of leadership and finance. Table 4-5 Table shows the summated means and standard deviations for the seven dimension items by organization represented.

Figure 4-4: Summary of organizational health as perceived by Cooperative Extension representatives.
Communication Dimension

There were statistically significant differences in the perceptions for the communication dimension when examined by organization represented ($F=5.51$, $p=.021$). County Extension Directors had a significantly more positive perception ($M=2.31$, $SD=.41$) as compared to directors of continuing education and continuing education area representatives ($M=2.59$, $SD=.68$). It is important to put these means in the context of the response scale. Both group means indicated positive perceptions on the communication dimension. The mean scores for the individual statements included in the communication dimension show that county extension directors held more positive perceptions for eight of nine statements. Continuing education staff had slightly more positive perceptions for the statement “communication between Outreach units is very good,” but only by a difference of .02 in the mean scores. The means and standard deviations for the communication dimension are included in Table 4-6.

<table>
<thead>
<tr>
<th></th>
<th>Continuing Education N=55</th>
<th>Cooperative Extension N=43</th>
<th>Table Total N=98</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership</td>
<td>2.42 (.60)</td>
<td>2.58 (.60)</td>
<td>2.49 (.60)</td>
</tr>
<tr>
<td>Relationships</td>
<td>2.13 (.59)</td>
<td>1.97 (.41)</td>
<td>2.06 (.52)</td>
</tr>
<tr>
<td>Communication</td>
<td>2.59 (.68)</td>
<td>2.31 (.41)</td>
<td>2.47 (.59)</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>2.85 (.65)</td>
<td>2.38 (.44)</td>
<td>2.65 (.61)</td>
</tr>
<tr>
<td>Involvement &amp; Decision Making</td>
<td>2.46 (.74)</td>
<td>2.20 (.47)</td>
<td>2.35 (.64)</td>
</tr>
<tr>
<td>Change Management</td>
<td>2.76 (.67)</td>
<td>2.53 (.52)</td>
<td>2.66 (.61)</td>
</tr>
<tr>
<td>Finance</td>
<td>2.54 (.68)</td>
<td>2.62 (.56)</td>
<td>2.57 (.63)</td>
</tr>
</tbody>
</table>
There was a statistically significant difference in perceptions of the infrastructure dimension when examined by organization represented (F=15.63, p=<.001). Those representing Cooperative Extension had significantly more positive perceptions (M=2.38, SD=.44) as compared to those representing Continuing Education (M=2.85, SD=.65). As in the communication dimension the group mean for the Cooperative Extension infrastructure dimension was clearly in the positive direction whereas the group infrastructure mean for the continuing education representatives was very close to neutral. Both group means indicated positive perceptions on the communication dimension. The mean scores for the individual items included in the infrastructure
dimension show that Cooperative Extension personnel were more positive than Continuing Education staff for all 16 items. The means and standard deviations for the infrastructure dimension are included in Table 4-7.

Table 4-7: Means and Standard Deviations for Infrastructure Dimension Items by Organization Represented

<table>
<thead>
<tr>
<th>Item</th>
<th>Mean (Continuing Education)</th>
<th>Std Deviation (Continuing Education)</th>
<th>Mean (Cooperative Extension)</th>
<th>Std Deviation (Cooperative Extension)</th>
<th>Mean (Total)</th>
<th>Std Deviation (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am given the training and professional development I need to do my job.</td>
<td>2.41</td>
<td>1.11</td>
<td>2.07</td>
<td>.81</td>
<td>2.26</td>
<td>1.00</td>
</tr>
<tr>
<td>Formal procedures and policies help me to do my job.</td>
<td>2.72</td>
<td>.96</td>
<td>2.24</td>
<td>.82</td>
<td>2.51</td>
<td>.93</td>
</tr>
<tr>
<td>The current structure of the organization helps me do my job.</td>
<td>3.17</td>
<td>1.06</td>
<td>2.62</td>
<td>.76</td>
<td>2.93</td>
<td>.98</td>
</tr>
<tr>
<td>Informal practices are not the norm.</td>
<td>2.94</td>
<td>.81</td>
<td>2.76</td>
<td>.82</td>
<td>2.86</td>
<td>.82</td>
</tr>
<tr>
<td>Proper planning is how things get done around here.</td>
<td>2.85</td>
<td>1.09</td>
<td>2.29</td>
<td>.81</td>
<td>2.60</td>
<td>1.01</td>
</tr>
<tr>
<td>Our current systems help us to do our work.</td>
<td>3.15</td>
<td>.98</td>
<td>2.60</td>
<td>.86</td>
<td>2.91</td>
<td>.96</td>
</tr>
<tr>
<td>We are good at implementation [achieving results].</td>
<td>2.54</td>
<td>1.19</td>
<td>1.83</td>
<td>.70</td>
<td>2.23</td>
<td>1.06</td>
</tr>
<tr>
<td>Technology is valued.</td>
<td>2.15</td>
<td>.79</td>
<td>1.62</td>
<td>.54</td>
<td>1.92</td>
<td>.74</td>
</tr>
<tr>
<td>Technology is seen as important to our success.</td>
<td>2.22</td>
<td>.74</td>
<td>1.64</td>
<td>.66</td>
<td>1.97</td>
<td>.76</td>
</tr>
<tr>
<td>The organization prepares me to work with new technology.</td>
<td>2.70</td>
<td>.94</td>
<td>2.26</td>
<td>.83</td>
<td>2.51</td>
<td>.92</td>
</tr>
<tr>
<td>Teams are part of the organizational culture at my location.</td>
<td>2.56</td>
<td>1.08</td>
<td>1.95</td>
<td>.82</td>
<td>2.29</td>
<td>1.01</td>
</tr>
<tr>
<td>We have formal teams that achieve results.</td>
<td>3.13</td>
<td>1.13</td>
<td>2.29</td>
<td>.86</td>
<td>2.76</td>
<td>1.1</td>
</tr>
<tr>
<td>We have a reward system that recognizes teamwork.</td>
<td>3.59</td>
<td>.94</td>
<td>2.95</td>
<td>.99</td>
<td>3.31</td>
<td>1.01</td>
</tr>
<tr>
<td>Our organizational policies reflect our values.</td>
<td>2.72</td>
<td>.71</td>
<td>2.60</td>
<td>.83</td>
<td>2.67</td>
<td>.76</td>
</tr>
<tr>
<td>There are clear strategies/procedures one must use to get things done here.</td>
<td>2.76</td>
<td>.91</td>
<td>2.71</td>
<td>.81</td>
<td>2.74</td>
<td>.86</td>
</tr>
<tr>
<td>Bureaucracy does not create barriers for getting my job done.</td>
<td>3.96</td>
<td>1.05</td>
<td>3.71</td>
<td>.94</td>
<td>3.85</td>
<td>1.01</td>
</tr>
</tbody>
</table>

Involvement and Decision Making Dimension
There was a statistically significant difference in perceptions of the involvement and decision making dimension when examined by organization represented ($F=3.989, p=.049$). Those respondents from Cooperative Extension had significantly more positive perceptions ($M=2.20, SD=.47$) as compared to those from Continuing Education ($M=2.46, SD=.74$). For both groups the mean was in the direction of having a positive perception. The mean scores for the individual items included in the involvement and decision making dimension illustrate that Cooperative Extension staff responded more favorably for 12 or the 14 items. Continuing Education personnel responded more favorably for the items, “I know how I can impact the future of our organization,” and “I am involved in the decision making process when it has a direct impact on my job.” The means and standard deviations for the involvement and decision making dimension are included in Table 4-8
There was a marginally significant difference (Huck, 2004) in perceptions of the change management dimension when examined by organization represented (F=3.30, p=.073). Those representing Cooperative Extension had marginally more positive perceptions (M=2.53, SD=.52) as compared to those representing Continuing Education (M=2.76, SD=.67). The means for the separate items included in the change management dimension are listed in Table 4-8.

Table 4-8: Means and Standard Deviations for Involvement and Decision Making Dimension Items by Organization Represented

<table>
<thead>
<tr>
<th>Item</th>
<th>Continuing Education N=55</th>
<th>Cooperative Extension N=43</th>
<th>Total N=98</th>
</tr>
</thead>
<tbody>
<tr>
<td>I know how I can impact the future of our organization.</td>
<td>2.19 (1.05)</td>
<td>2.33 (0.98)</td>
<td>2.25 (1.02)</td>
</tr>
<tr>
<td>I am encouraged to contribute to our future.</td>
<td>2.07 (0.89)</td>
<td>2.00 (0.80)</td>
<td>2.04 (0.85)</td>
</tr>
<tr>
<td>I am responsible for the decisions surrounding my work.</td>
<td>1.80 (0.59)</td>
<td>1.79 (0.68)</td>
<td>1.79 (0.63)</td>
</tr>
<tr>
<td>I know how I can influence decisions that affect my work.</td>
<td>2.37 (0.98)</td>
<td>2.05 (0.79)</td>
<td>2.23 (0.91)</td>
</tr>
<tr>
<td>I know what is expected of me.</td>
<td>2.02 (0.86)</td>
<td>1.90 (0.58)</td>
<td>1.97 (0.75)</td>
</tr>
<tr>
<td>The person I report to includes me in changes that affect my work.</td>
<td>2.13 (1.06)</td>
<td>1.74 (0.63)</td>
<td>1.96 (0.92)</td>
</tr>
<tr>
<td>I am encouraged to give my opinion.</td>
<td>1.98 (0.81)</td>
<td>1.67 (0.69)</td>
<td>1.84 (0.77)</td>
</tr>
<tr>
<td>I am given the authority to make decisions.</td>
<td>2.07 (0.82)</td>
<td>1.81 (0.74)</td>
<td>1.96 (0.79)</td>
</tr>
<tr>
<td>I feel valued for the contributions that I make.</td>
<td>2.35 (1.15)</td>
<td>1.90 (0.79)</td>
<td>2.16 (1.03)</td>
</tr>
<tr>
<td>Decisions that I make stand.</td>
<td>2.26 (0.78)</td>
<td>1.98 (0.52)</td>
<td>2.14 (0.69)</td>
</tr>
<tr>
<td>When the person I report to makes decisions, they stand.</td>
<td>2.22 (0.98)</td>
<td>1.95 (0.70)</td>
<td>2.10 (0.88)</td>
</tr>
<tr>
<td>We have a structured process for making decisions.</td>
<td>3.26 (0.83)</td>
<td>2.43 (0.83)</td>
<td>2.90 (0.92)</td>
</tr>
<tr>
<td>This organization makes effective decisions.</td>
<td>2.94 (0.88)</td>
<td>2.83 (0.88)</td>
<td>2.90 (0.88)</td>
</tr>
<tr>
<td>I am involved in the decision making process when it has a direct impact on my job.</td>
<td>2.41 (1.04)</td>
<td>2.50 (0.86)</td>
<td>2.45 (0.96)</td>
</tr>
</tbody>
</table>
dimension bear out more positive perceptions by county extension directors for 14 or 17 items. Continuing Education staff were more positive for the following three items: “Changes are created to make my job easier,” “Change is based on sound decision-making,” and “I think the Outreach partnership is a success.” The means and standard deviations for the change management dimension are included in Table 4-9.

Table 4-9: The Means and Standard Deviations for the Change Management Dimension by Organization Represented

<table>
<thead>
<tr>
<th></th>
<th>Organization</th>
<th>Mean</th>
<th>Std Deviation</th>
<th>Mean</th>
<th>Std Deviation</th>
<th>Mean</th>
<th>Std Deviation</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top leadership values creativity at my location.</td>
<td>Continuing Education: N=55</td>
<td>2.37</td>
<td>1.05</td>
<td>2.12</td>
<td>.94</td>
<td>2.26</td>
<td>1.01</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.91</td>
<td>.96</td>
<td>2.55</td>
<td>1.02</td>
<td>2.75</td>
<td>.99</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.35</td>
<td>.93</td>
<td>1.93</td>
<td>.71</td>
<td>2.17</td>
<td>.87</td>
</tr>
<tr>
<td>Top leadership values risk.</td>
<td>Continuing Education: N=55</td>
<td>2.91</td>
<td>.96</td>
<td>2.55</td>
<td>1.02</td>
<td>2.75</td>
<td>.99</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.04</td>
<td>.82</td>
<td>1.90</td>
<td>.91</td>
<td>1.98</td>
<td>.86</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.35</td>
<td>.93</td>
<td>1.93</td>
<td>.71</td>
<td>2.17</td>
<td>.87</td>
</tr>
<tr>
<td>Top leadership values diversity</td>
<td>Continuing Education: N=55</td>
<td>2.04</td>
<td>.82</td>
<td>1.90</td>
<td>.91</td>
<td>1.98</td>
<td>.86</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.35</td>
<td>.93</td>
<td>1.93</td>
<td>.71</td>
<td>2.17</td>
<td>.87</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.04</td>
<td>.82</td>
<td>1.90</td>
<td>.91</td>
<td>1.98</td>
<td>.86</td>
</tr>
<tr>
<td>Top leadership values innovation.</td>
<td>Continuing Education: N=55</td>
<td>2.35</td>
<td>.93</td>
<td>1.93</td>
<td>.71</td>
<td>2.17</td>
<td>.87</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.04</td>
<td>.82</td>
<td>1.90</td>
<td>.91</td>
<td>1.98</td>
<td>.86</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.35</td>
<td>.93</td>
<td>1.93</td>
<td>.71</td>
<td>2.17</td>
<td>.87</td>
</tr>
<tr>
<td>All employees are held accountable for their actions.</td>
<td>Continuing Education: N=55</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td>Creativity is rewarded.</td>
<td>Continuing Education: N=55</td>
<td>3.02</td>
<td>1.16</td>
<td>2.69</td>
<td>1.05</td>
<td>2.88</td>
<td>1.12</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.98</td>
<td>1.00</td>
<td>2.40</td>
<td>.86</td>
<td>2.73</td>
<td>.98</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.98</td>
<td>1.00</td>
<td>2.40</td>
<td>.86</td>
<td>2.73</td>
<td>.98</td>
</tr>
<tr>
<td>I am rewarded for taking risks.</td>
<td>Continuing Education: N=55</td>
<td>3.06</td>
<td>.90</td>
<td>2.62</td>
<td>.91</td>
<td>2.86</td>
<td>.92</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>3.31</td>
<td>.89</td>
<td>2.90</td>
<td>.96</td>
<td>3.14</td>
<td>.94</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>3.31</td>
<td>.89</td>
<td>2.90</td>
<td>.96</td>
<td>3.14</td>
<td>.94</td>
</tr>
<tr>
<td>I am rewarded for challenging the status quo.</td>
<td>Continuing Education: N=55</td>
<td>3.06</td>
<td>.90</td>
<td>2.62</td>
<td>.91</td>
<td>2.86</td>
<td>.92</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>3.31</td>
<td>.89</td>
<td>2.90</td>
<td>.96</td>
<td>3.14</td>
<td>.94</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>3.31</td>
<td>.89</td>
<td>2.90</td>
<td>.96</td>
<td>3.14</td>
<td>.94</td>
</tr>
<tr>
<td>Innovation is rewarded.</td>
<td>Continuing Education: N=55</td>
<td>2.76</td>
<td>.89</td>
<td>2.40</td>
<td>.83</td>
<td>2.60</td>
<td>.88</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>3.56</td>
<td>.88</td>
<td>3.33</td>
<td>.87</td>
<td>3.46</td>
<td>.88</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>3.56</td>
<td>.88</td>
<td>3.33</td>
<td>.87</td>
<td>3.46</td>
<td>.88</td>
</tr>
<tr>
<td>Conflict is viewed as positive.</td>
<td>Continuing Education: N=55</td>
<td>3.15</td>
<td>1.00</td>
<td>3.33</td>
<td>.82</td>
<td>3.23</td>
<td>.92</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>3.04</td>
<td>.97</td>
<td>3.05</td>
<td>.85</td>
<td>3.04</td>
<td>.92</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>3.15</td>
<td>1.00</td>
<td>3.33</td>
<td>.82</td>
<td>3.23</td>
<td>.92</td>
</tr>
<tr>
<td>Changes are created to make my job easier.</td>
<td>Continuing Education: N=55</td>
<td>3.15</td>
<td>1.00</td>
<td>3.33</td>
<td>.82</td>
<td>3.23</td>
<td>.92</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>3.04</td>
<td>.97</td>
<td>3.05</td>
<td>.85</td>
<td>3.04</td>
<td>.92</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>3.15</td>
<td>1.00</td>
<td>3.33</td>
<td>.82</td>
<td>3.23</td>
<td>.92</td>
</tr>
<tr>
<td>Change is based on sound decision-making.</td>
<td>Continuing Education: N=55</td>
<td>2.46</td>
<td>1.08</td>
<td>2.36</td>
<td>.85</td>
<td>2.42</td>
<td>.98</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>3.02</td>
<td>1.00</td>
<td>2.86</td>
<td>.90</td>
<td>2.95</td>
<td>.96</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>3.02</td>
<td>1.00</td>
<td>2.86</td>
<td>.90</td>
<td>2.95</td>
<td>.96</td>
</tr>
<tr>
<td>I receive recognition for the work that I do.</td>
<td>Continuing Education: N=55</td>
<td>2.02</td>
<td>.96</td>
<td>1.62</td>
<td>.49</td>
<td>1.84</td>
<td>.81</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.02</td>
<td>.96</td>
<td>1.62</td>
<td>.49</td>
<td>1.84</td>
<td>.81</td>
</tr>
<tr>
<td>We spend time learning from change efforts that did not succeed.</td>
<td>Continuing Education: N=55</td>
<td>2.02</td>
<td>.96</td>
<td>1.62</td>
<td>.49</td>
<td>1.84</td>
<td>.81</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.02</td>
<td>.96</td>
<td>1.62</td>
<td>.49</td>
<td>1.84</td>
<td>.81</td>
</tr>
<tr>
<td>The person I report to encourages me to learn new things.</td>
<td>Continuing Education: N=55</td>
<td>2.02</td>
<td>.96</td>
<td>1.62</td>
<td>.49</td>
<td>1.84</td>
<td>.81</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.02</td>
<td>.96</td>
<td>1.62</td>
<td>.49</td>
<td>1.84</td>
<td>.81</td>
</tr>
<tr>
<td>I am given the opportunity to try new things.</td>
<td>Continuing Education: N=55</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.06</td>
<td>.76</td>
<td>1.71</td>
<td>.46</td>
<td>1.91</td>
<td>.67</td>
</tr>
<tr>
<td>I think the Outreach partnership is a success.</td>
<td>Continuing Education: N=55</td>
<td>2.76</td>
<td>.89</td>
<td>3.21</td>
<td>.75</td>
<td>2.96</td>
<td>.86</td>
</tr>
<tr>
<td></td>
<td>Cooperative Extension: N=43</td>
<td>2.76</td>
<td>.89</td>
<td>3.21</td>
<td>.75</td>
<td>2.96</td>
<td>.86</td>
</tr>
<tr>
<td></td>
<td>Total: N=98</td>
<td>2.76</td>
<td>.89</td>
<td>3.21</td>
<td>.75</td>
<td>2.96</td>
<td>.86</td>
</tr>
</tbody>
</table>
Other Dimensions of Culture

There were no statistically significant ($p \leq 0.05$) or marginally significant differences ($p > 0.05$ and $p < 0.10$) in the perceptions for the leadership dimension, relationship dimension, or finance dimension.

Factors Influencing Differences in Perception

Research Question 2

*If there are differences in the cultural dimensions, what demographic variables account for or contribute to the cultural differences between Continuing Education and Cooperative Extension personnel at Penn State University?*

Since there were no significant differences in the leadership, relationship, or finance dimension for the previous analysis, the results for research question two focus only on the four dimensions where significant differences were found.

The researcher used multiple regression analysis to examine what additional demographic factors may have influenced the differences in perceptions for each of the four cultural dimensions of infrastructure, communication, involvement and decision making, and change management.
The four analysis results for the multiple regression analysis resulted in only the regression model for infrastructure being significant. Those results follow with regression tables for the other dimensions appearing in Appendix B.

**Infrastructure Dimension**

The regression analysis shows significant differences in the perceptions for the infrastructure dimension when examined by the other demographic variables and organization represented ($F=3.43$, $p=.004$, $R\ Square=.188$). Organization represented was the only significant factor ($p=.008$) in explaining differences in perceptions of infrastructure in the organization when accounting for the influence of all other demographic factors using the regression model.

Table 4-10 shows the total summated perceptions of all 16 items included in the infrastructure dimension. The only significant factor for explaining what about the respondents influenced their perceptions of infrastructure was the organization they represented. Cooperative Extension employees had significantly more positive perceptions (Mean=2.4) regarding organizational infrastructure than did Continuing Education respondents (Mean=2.8).

Regression analysis of leadership, relationship, communication, involvement and decision making, change management, and finance were not statistically significant using the regression model. One way ANOVAs did indicate statistically significant differences between Cooperative Extension and Continuing Education for the dimensions of relationship, infrastructure, and change management. However, the more comprehensive regression analysis ruled out the statistical significance of the relationship and change
management dimensions. The regression of infrastructure perceptions on the six demographic variables is included in Table 4-10

Table 4-10: Regression of Infrastructure Perceptions on Six Demographic Variables

<table>
<thead>
<tr>
<th>Model</th>
<th>Unstandardized Coefficients</th>
<th>Standardized Coefficients</th>
<th>95% Confidence Interval for b</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constant</td>
<td>3.76</td>
<td>.526</td>
<td>7.148</td>
</tr>
<tr>
<td>Education (bachelor vs graduate degree)</td>
<td>-.193</td>
<td>.172</td>
<td>-.115</td>
</tr>
<tr>
<td>Age (&lt;55 yrs vs 55 or older)</td>
<td>-.047</td>
<td>.144</td>
<td>-.033</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>-.097</td>
<td>.162</td>
<td>-.079</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>.036</td>
<td>.190</td>
<td>.024</td>
</tr>
<tr>
<td>Organization (Cont. Ed. vs Coop Ext)b</td>
<td>-.025</td>
<td>.131</td>
<td>-.345</td>
</tr>
<tr>
<td>Gender (Male vs Female)</td>
<td>-.145E-005</td>
<td>.126</td>
<td>.000</td>
</tr>
</tbody>
</table>

a. Model Summary: F=2.81; df=6/89; p=.015; R square=.159; Adjusted R square=.103
b. Note: The base level/category is reported first in ( ) for the independent variables

Respondents’ Perceptions Regarding the Organization

The researcher asked employees to respond to three open-ended questions. The intent of the open-ended questions was to obtain their views regarding current practices/activities and to suggest practices/activities they would change to enhance the organization. The intent was to assess whether this would help further understand the cultural perceptions reported by the participants in the forced-choice Likert-type response scale section of the survey.

The three open-ended questions provided narrative boxes to gather as much text as respondents chose to share in response to each question. The responses of all respondents for Question 1 were combined into a separate text file. Moving the narrative
responses to a separate text file disassociated the responses from the individual respondents. A similar process was repeated for Question 2 and Question 3. NVivo software aided the open coding of these qualitative data elements. A total of 370 coded nodes for Question 1 and Question 2 were aligned with one or more of 27 themes. The analysis for Question 3 has been purposefully omitted from this thesis. The major themes that emerged from the data for Question 1 were positive leadership, hope, new directions, and collaborations. The major themes that emerged from the data for Question 2 included financing ideas, streamlining the organization, teamwork, and decision-making.

**Open-ended Question 1**

*What are the three things that excite you about what is currently going on in your organization?*

The 228 narrative nodes for open-ended question 1 were placed into 14 codes through the use of an open coding process. The codes and number of nodes recorded for each code were creativity (14), funding (17), hope (28), new directions (28), no comment (8), people (5), positive leadership (30), public support (16), red tape (15), teamwork (17), negative comments (7), new client groups (6), collaboration (20), and change (15). The top four codes are included in table 4-11.
Open-ended Question 2

*Please complete the following statement – We would be more successful if we ...?*

The 142 narrative nodes for open-ended question 2 were placed into 21 codes through the use of an open coding process. The codes and number of nodes recorded for each code were creativity (5), financing ideas (21), no comment (5), public support (5), red tape (9), teamwork (17), negative comments (3), new client groups (3), collaboration (11), technology (3), streamlining the organization (16), risk taking (2), decision-making (15), communication (7), need a plan (6), need support (1), improve quality control (6), marketing (1), decentralize (3), and professional development (2). The top four codes are included in table 4-12.
This chapter reported the findings of this research study in the form of perceptions of directors of continuing education, continuing education area representatives, and county extension directors to ninety-eight forced-choice survey statements and three open-ended questions. The next chapter will provide a summary of the research findings, share conclusions drawn from this research, and make recommendations for the organization to consider in their strategic planning and operations.

Table 4-12: Open Coding Results for Open-ended Question 2

<table>
<thead>
<tr>
<th>Code</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financing Ideas</td>
<td>21</td>
<td>14.79</td>
</tr>
<tr>
<td>Teamwork</td>
<td>17</td>
<td>11.97</td>
</tr>
<tr>
<td>Streamline the Organization</td>
<td>16</td>
<td>11.27</td>
</tr>
<tr>
<td>Decision-making</td>
<td>15</td>
<td>10.56</td>
</tr>
</tbody>
</table>

a. Note: Percentages do not equal 100% because all codes have not been included in the table
Chapter 5

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Chapters 1 through 4 have dealt with the introduction of the problem, the research questions, the review of related literature, the research methodology, and the results of the study. Chapter 5 summarizes the findings, presents conclusions related to the research questions, and offers recommendations for practice and recommendations for future research.

Research Questions

The purpose of this study was to assess and compare the organizational cultures of Continuing Education and Cooperative Extension at Penn State. The two research questions that guided this study were:

RQ1 – Are there similarities between the organizational cultures of Continuing Education and Cooperative Extension at Penn State?

RQ2 – If so, what variables account for the cultural differences between Continuing Education and Cooperative Extension at Penn State?

Research Methodology

The research methodology for this study included using the Cultural Health Indicator survey instrument developed by Emerge International (1999) and validated by
Dr. Lloyd Williams. The Cultural Health Indicator is a web-based instrument and consisted of 98 forced-choice questions with five-point Likert-type rating response scales. The questions addressed seven dimensions of organizational culture: leadership, relationships, communication, infrastructure, involvement and decision-making, change management and finance. Three open-ended questions were also included.

**Quantitative Methods**

The survey was distributed to 135 individuals in middle-management positions within two Outreach units at Penn State (Continuing Education and Cooperative Extension). A pilot test was conducted with a 10% sample of the total survey population and received a 71.43% return. The final survey instrument was then sent to all members of the survey population, less the pilot group, who were directors of continuing education, continuing education area representatives, and county extension directors at Penn State and achieved a response rate of 66.12%. A follow up survey of non-respondents was conducted and included a 10% sample of the survey population who did not respond to the initial survey request. The survey of non-respondents had a response rate of 80%. The overall response rate for the study was 72.57%.

**Summary of Results for RQ1**

There were statistically significant differences in the perceptions for the dimensions of communication, infrastructure, involvement and decision making, and a marginally
significant difference for the dimension of change management when examined by organization represented, although it must be noted that both groups indicated positive perceptions. A sample of particularly pertinent statements from the Cultural Health Indicator and interpretations for the dimensions of communication, infrastructure, involvement and decision making, and change management follow.

**Communication Dimension**

**Statement III - 7:** *Communication between Outreach units is very good.*

Based on the perceptions shared, communication between departments is not very good. This statement ranked 98th out of 98 questions. Only 12% of respondents agreed with this statement; 43% were neutral; 46% disagreed. “Since there was an unhealthy response to this statement there is a high probability that employees are operating in silos. The communication environment may start to take on an “us against them” mentality. This may be fostered by conflicting goals between departments. Two suggestions are to get top management to first acknowledge that the problem exists. This is an area that can easily foster denial. Once acknowledged, all management personnel must get on the same page with regards to the organization’s values, missions and goals. Also, consider bringing the management team together and begin working at eliminating hidden agendas and rewarding the management team for creating an environment that opens up to more honesty, trust and respect” (EMERGE International, 2005, p. 46).

**Statement III - 8:** *Information about the organization is shared at all levels.*
It appears that information about the organization has not been shared at all levels. This statement ranked 93rd out of 98 questions. Twenty-five percent of respondents agreed with this statement while 46% remained neutral and 30% disagreed. When information is not shared staff are less apt to contribute to the overall success of the organization. They cannot see the big picture and do not understand how what they do impacts the whole. Their sense of pride in the organization may diminish. When employees are not clear about where the organization is going they will tend to be less committed to the overall purpose of the business and less productive.

Perceptions are that information about the organization has not been shared at all levels. Leadership should take the time to understand how information is currently being shared. They should ask themselves these key questions: Where are the barriers? Are the communication channels sufficient? Are they suitable? Are they appropriately supported? If it is discovered that certain individuals restrict such information flow, is leadership able and willing to make changes? This may mean supervisors need to help some employees develop new habits or make changes in their roles/Responsibilities. Where does the information flow stop and what happens to it when it pools? When managers discover where it stops, they may also discover who controls the flow. Sometimes it’s simply a matter of the mechanics of the distribution channels; but it may be discovered that certain individuals restrict the flow for their own purposes. Mechanical structures can be fixed fairly easily, once discovered. Changing people’s habits is more challenging. (EMERGE International, 2005)
Infrastructure Dimension

Statement IV - 11: Teams are part of the organizational culture at my location.

It appears that Outreach does have formal teams. A total of 70% of respondents strongly agreed or agreed with this statement. Only 10% were neutral; and, 20% disagreed or strongly disagreed with the statement.

“This is a good indication that Outreach has developed a structured and consistent process for managing organizational teams. It shows that the management team supports organizational teams. Achieving results fosters pride in one’s work and a healthy camaraderie among the team members. It forms a resilient bond that shares a ‘can-do’ attitude and energy that is easily braced for more exacting challenges.

Is there a sense that the achievement indicated by this positive response was a one-time success? Or is it a result of several successes, indicating a culture that is quite healthy? If it is the former, then quickly capitalize on the success and strive to have it repeated and modeled by others. This may be an opportunity to launch other teams, as success in this area can often be quite contagious. New teams are often eager to prove themselves and will bring a healthy sense of competition to bear on the tasks at hand. Be cautious, however, not to let competition become too aggressive” (EMERGE International, 2005, p. 58).

Statement IV - 13: We have a reward system that recognizes teamwork.

The perception is that organizational policies do not reflect organizational values. This statement ranked 94th out of 98 questions. Forty-nine percent of respondents disagreed with this statement, whereas, 23% agreed and 27% remained neutral.
“Employees do not feel that the organization’s policies reflect the values. This incongruence causes frustration for employees and does not provide clarity in terms of expected behaviors. Trust levels within the organization are negatively impacted. Outreach employees may seek to disassociate themselves from the organization or, if they stay, they may hold back their best efforts” (EMERGE International, 2005, p. 60).

Outreach policies appear to not reflect Outreach values. Personnel do not feel that the organization’s policies reflect the values. Outreach administration should take the time to review Outreach policies and identify where the disconnects may be between policies and values. They should welcome the voice of faculty and staff and encourage them to help point out these gaps, making them an integral part of the “fix” that leadership should implement. Encourage them to help make the workplace “real” as they assist in either redefining the organization’s values or in resetting the policies that seem to work counter to these objectives.

**Statement IV - 16:** Bureaucracy does not create barriers for getting my job done.

The perception is that bureaucracy does indeed create barriers to individuals perceptions of getting their job done. This statement ranked 96th out of 98 questions in this survey. Only 16% of respondents agreed with this statement. Two thirds (66%) of respondents disagreed with the statement. Eighteen percent remained neutral.

This incongruence causes frustration for employees as they struggle to overcome “red tape” in an effort to “do their job”. Productivity levels within the organization are negatively impacted. Outreach employees may seek to disassociate themselves from the organization or, if they stay, they may hold back their best efforts.
Take the time to review Outreach policies and identify where the disconnects may be between bureaucratic systems. Welcome the voice of faculty and staff and encourage them to help point out these gaps, making them an integral part of the “fix” that leadership should implement. Encourage them to help make the workplace “real” as they assist in developing processes to overcome this obstacle.

**Involvement and Decision Making Dimension**

**Statement V - 5: I know what is expected of me.**

“Clear objectives and clear expectations are critical to a healthy organizational culture. An organization’s communication structure is the foundation upon which so much more can be built. Communication clarity helps reduce stress and encourages greater energy to be focused on the tasks at hand, rather than trying to decipher the intentions of organizational directives” (EMERGE International, 2005, p. 67). It is apparent that expectations are clear in Outreach units. Ninety percent of respondents agreed with this statement and only five percent disagreed.

While the employees have revealed that they know what is expected of them, the study did not determine whether expectations are reasonable or not. If the expectations are reasonable, administration has a wonderful opportunity to build upon this positive response. They can encourage feedback and input from the employees. Communication flow to and from all members within the organization may be emphasized. Administration can maximize the clarity gained by seeking continuous improvement in how the organization’s vision, mission and goals are shared among everyone.
Statement V - 7: I am encouraged to give my opinion.

“There is nothing more energizing to an individual then to feel that what they have to say is given serious consideration. Employees can feel a true sense of pride and will be more apt to take a risk and contribute their ideas. They will be energized because they feel a true sense of purpose and are not just showing up for work” (EMERGE International, 2005, p. 69). It is apparent that opinions are respected in Outreach units. Ninety percent of respondents agreed with this statement and only four percent disagreed.

Outreach administrators should make sure that once opinions are received that they are seriously considered. Employees are quick to discern when a solicitation for opinions is not followed by a real evaluation. Employees should be given feedback so they know what was accepted, what was rejected, and why. Also, supervisors and administrators should provide feedback about when their input will be implemented. Make sure the organization’s compensation plans include some type of incentive to reward those who have contributed viable, positive ideas. And, make such compensation practices known to everyone to encourage further participation in the future.

Change Management Dimension

Statement VI - 10: Conflict is viewed as positive.

It is apparent that conflict is not viewed as positive. This statement ranked 97th out of 98 questions. Only 13% of respondents agreed with this statement, while 56% disagreed. “High performing cultures invite conflict. They see it as something that should not be feared and/or avoided. They see conflict as something that actually serves to
strengthen relationships and help them grow. Having an unhealthy view of conflict can create stagnation in employee relationships and in the introduction of new ideas. Change is not easily embraced in such an environment. People are less at liberty to express their feelings, and opinions are not shared openly. Hidden agendas are more likely to be exercised and true progress is less likely to be realized” (EMERGE International, 2005, p. 86).

Employees should be educated to become aware of what conflict means and how it can be used to add a positive value to an organization. Conflict management skills need to be obtained by everyone, management and employees alike, so that opinions are shared. Openly recognizing the role conflict plays while setting guidelines to minimize aggressive responses, ensures that everyone feels safe while they are encouraged to share their opinions.

There were no statistically significant (p≤.05) or marginally significant differences (p>.05 and p<.10) in the perceptions for the leadership dimension, relationship dimension, or finance dimension. However, discussion of each dimension follows.

**Leadership Dimension**

**Statement I - 6:** *Consistency exists in the statements and actions of top leadership.*

[Healthy 36.4% Neutral 26.0% Unhealthy 37.7%]
“When what organizational leaders say on paper and in conversations is not how they actually behave, they are creating a high level of frustration and distrust. Staff begin to question what is expected of them. The old ‘do as I say, not as I do,’ becomes the norm. This type of behavior causes personal commitment levels to diminish. When you suffer from an incongruent culture, energy levels are adversely affected and your ability to perform optimally, to implement your strategy and satisfy your customers, is hampered. All of these factors contribute to a less-than-healthy bottom line.

LEL=PP=LCSL=DIR = DIE. [Low Energy Levels = Poor Performance = Low Customer Satisfaction Levels = Decrease In Revenues = Decrease In Earnings.]

When leadership says one thing on paper but behaves in a different way, the likelihood that employees will respect decisions that are made is greatly diminished. Leadership is always being watched by the workforce. Leadership must be congruent and their words should reflect their actions. In order for employees to have clarity they must see consistency. Then and only then can there be an energized workforce” (EMERGE International, 2005, p. 24).

Reviewing policies/practices for leadership support and then modifications should be made for those without administrative support. Determine where communication breakdowns are occurring. Is it in specific departments, divisions, etc.? One way to accomplish this is through focus groups.

**Statement I - 14:** *What employees know, not whom they know is important.*

[Healthy 35.1% Neutral 37.7% Unhealthy 27.3%]

“This implies that there is a clear procedure for how decisions are made and it is not based upon one's relationships. Consider Malsow’s basic hierarchy of needs. One of
the key elements for attaining self-actualization is self-esteem, which comes in two ways. One way results from competence or mastery of task. Employees want to be recognized for their level of contribution. Healthy cultures provide life-giving forces to their employees and practice fairness and honesty” (EMERGE International, 2005, p. 30). During future focus groups it would be helpful to gain clarity around what practices are causing employees to feel that their knowledge and skills are valued.

**Relationships Dimension**

**Statement II - 2: I like my coworkers.**

[Healthy 93.5% Neutral 3.9% Unhealthy 2.6%]

“There are many levels of interpersonal skills that are critical in creating a healthy culture. Knowing how to have healthy working relationships with coworkers is one of those skills. It has been determined that employees who like each other and spend time with each other outside the workplace tend to be more supportive of each other and more productive” (EMERGE International, 2005, p. 33).

**Statement II - 7: Positive working relationships exist between the person I report to and me.**

[Healthy 90.9% Neutral 3.9% Unhealthy 5.2%]

“In high performing cultures there is a strong bond between employees and the person they report to. When this is the case employees are more trusting and are not afraid to speak their mind. Their level of enthusiasm tends to be very high as well as their productivity levels” (EMERGE International, 2005, p. 36).
Statement II - 13: We have positive relationships with our participants and client organizations.

[Healthy 93.5% Neutral 5.2% Unhealthy 1.3%]

“A culture that can be proud of its customer relationships is one that fosters good service. Its employees tend to do more for the customer and are more attentive to the opportunities to build on that relationship. Such a culture encourages its people to remain with the company longer, thereby positively impacting its retention factor. There may be several reasons why this kind of culture is generated: trust, open and honest communication, friendly work atmosphere, and fairness are but a few” (EMERGE International, 2005, p. 40).

Statement II - 14: We care about the community we serve.

[Healthy 93.5% Neutral 3.9% Unhealthy 2.6%]

“High performing cultures care about the community that they operate in and it is obvious by their actions. This score implies that Outreach employees have reached a level of caring for others that reaches beyond the boundaries of the organization. With that caring outreach, the organization, too, becomes ‘involved’ with the community it serves. This is a strong indicator that the culture is healthy as employees seek validation by ‘doing’ what they can – they care – for the community. Only by starting from a strong intrinsic sense of self-worth are they able to participate this way. Also note that the statement says that ‘everyone’ cares this way, which indicates that this is not an isolated corner of the organization; but that this community perspective permeates your organization throughout” (EMERGE International, 2005, p. 40). Identify what is currently occurring and continue to replicate. Collect feedback from the community on
effectiveness of your company’s efforts and ideas on how to continue to grow the company-community relationship

One general finding of this study was that Cooperative Extension representatives had a decidedly more positive perception overall of the seven dimensions of organizational culture than Continuing Education representatives, although this difference was not statistically significant.

**Summary of Results for RQ2**

Since there were no significant differences in the leadership, relationship, or finance dimension for the previous analysis, the results for research question two focus only on the four dimensions where significant differences were found.

The researcher used multiple regression analysis to examine what additional demographic factors may have influenced the differences in perceptions for each of the four cultural dimensions of infrastructure, communication, involvement and decision making, and change management. The four analysis findings for the multiple regression analysis resulted in only the regression model for infrastructure having been significant.

The multiple regression model analysis showed significant differences in the perceptions for the infrastructure dimension when examined by the five demographic variables including organization represented. Organization represented was the only significant factor in explaining differences in perceptions of infrastructure in the organization when accounting for all other demographic factors using the multiple regression model.
Qualitative Methods

The three open-ended questions were analyzed using open-coding techniques assisted by NVivo software. The three open-ended questions provided narrative boxes to gather as much text as respondents chose to share in response to each question. The responses of all respondents for Question 1 were combined into a separate text file. Moving the narrative responses to a separate text file disassociated the responses from the individual respondents. A similar process was repeated for Question 2 and Question 3. NVivo software aided the open coding of these qualitative data elements. A total of 370 coded nodes for Question 1 and Question 2 were aligned with one or more of 27 themes. The analysis for Question 3 has been purposefully omitted from this thesis. The major themes that emerged from the data for Question 1 were positive leadership, hope, new directions, and collaborations. The major themes that emerged from the data for Question 2 included financing ideas, streamlining the organization, teamwork, and decision-making.

Summary of Results for Open-Ended Questions

Open-ended Question 1

*What are the three things that excite you about what is currently going on in your organization?*
The top four codes for this question were positive leadership (30 nodes), hope (28 nodes), new directions (28 nodes), and collaboration (20 nodes). Thirty comments reflected **positive leadership** and a representative sample includes the following:

- Leadership is taking steps towards change.
- Ability to implement staff changes to reward quality work.
- Strategic plan looks to breathe new life into the organization.
- That my boss lets me be creative and try new ventures.
- New leadership, new strategies, new ideas.

Twenty-eight comments reflected **hope** and a sample of those comments included:

- The spirit of optimism in the face of inevitable change and challenging budgets.
- Being asked the questions on this survey.
- Most of the people who work in Outreach are truly committed to the idea that education can change people’s lives and make life better.
- Knowing that Dr. Craig Weidemann is aware of the need for change and initiating change.
- The main thing that excites me is the Outreach organization stepping up to meet challenges that our businesses, communities, and individuals are facing. Behind each client company, community, or training program, is an individual person whose life we can make better in some way. That is satisfying when that happens.
Twenty-eight comments reflected **new direction** and a few of the comments included:

- We are continually trying new things.
- New collaborations are opening up new opportunities.
- Actually had the ability, expertise and commitment to develop new programs.
- Took more risks and challenged the status quo (but did so armed with accurate and complete market research and sound financial analysis of the implications of such actions). This organization should be applauded for its willingness to develop new programs and it should learn how to replicate its successes and avoid repeating its failures.

Thirty-one comments reflected **collaboration** and a few of the comments included:

- Great opportunities to re-think and reposition public higher education in Pennsylvania through coalition building with communities, community colleges, K-12, business and government.
- One thing that excites me is the collaboration of different Outreach resources to provide comprehensive service to customer needs.
- The vast resources of Penn State – human capital, statewide system, intellectual activity.
All worked together more. There is always, in any organization, the idea of protecting your own campus, own department. We need to work as a unit, as a whole to succeed.

Worried less about turf and more about doing what is right for the customer.

Open-ended Question 2

Please complete the following statement – We would be more successful if we ...?

The top four codes for this question were financing ideas (21 nodes), streamline the organization (16 nodes), teamwork (17 nodes), and decision-making (15 nodes).

Twenty-one comments reflected financing ideas and a representative sample includes the following:

- Had an easier financial system to process grants.
- Future endowment possibilities to maintain services.
- Ability to make changes that have an impact on the bottom line.
- Opportunity to be entrepreneurial and generate funds to support new programs or continue programs for which funding is reduced.
- Were more successful at the national level at making new partnerships using Extension as the community tool to reach families/business and providing us with new funding sources.
Sixteen comments suggested that we **streamline the organization**; sample comments included:

- Cut the red tape!!!!!!
- Streamlined more processes.
- Had more of the resources available to University Park-based units easily available at our site.
- Served the adult learner “the way our competitors do”. Meet their needs, offer programs/degrees at convenient times, weekend degrees, accelerated programming, offered extended office hours, etc.
- Develop programs and produce them in a timely manner. New program development takes way too long. Turn around time is critical if we are to succeed.

Seventeen comments reflected **teamwork** and a few sample comments included:

- All worked towards the same goals, the same desired sense of accomplishment.
- We talk a lot about collaboration, and we do meet together periodically, and that is all good. However, we need to truly identify ways in which Outreach organizations can effectively work together. I think the key is that these opportunities for working together be opportunities that “fit” with the organizations missions, and that employees are truly give the time and reward for working together. It appears that many of our individual and organization work plans do not include goals for working together.
Made the search for new programs a priority and utilized a collaborative approach.

Work together, really understand the true concept of a team, instead of just using the word.

Fifteen comments reflected decision-making and a representative sample of those comments included:

Made decisions and implemented them quicker.

Gave staff information to make informed decisions and then trusted their decisions or gave the leniency to make things happen.

Would be more open to the idea that there are new and multiple ways to accomplish specific tasks. As the sources of funding diversify from formula funding to grants and gifts, there may not be “one size fits all” policies about how people are hired, trained, retained. Now, sometimes, we try to fit non-traditional situations into say yes more and than say no, say now not later.

Set clear rewards for clear achievement, clarified how Outreach units can work together, set better and more clearly defined decision making models (something other than more committees or more email) before the process begins (the ground rules for decision making).
Open-ended Question 3

*If you were vice president of Outreach for the day, what is the one thing that you would change and how?*

Although the responses to this question were analyzed into themes, a few key responses included:

- Have all Outreach partners (including campus-based Continuing Education staff) report to one organization and fall under the same financial umbrella.
- If I were Vice President of Outreach I would make sure that every unit knew where they fit and how they are valued within the organizational structure. Currently it is unclear where Continuing Education fits and this is disheartening to those who serve the community and Penn State through continuing education efforts.
- Couldn’t do what I would like in one day. I think Weidemann is doing what I would….sharing vision and mission with faculty and staff..striving to get us all going in the same direction.
- I would identify those key strategic areas of focus, communicate them appropriately throughout the Outreach organization. I would also look at how we are currently working toward meeting those strategies where teams are or are not in place to effectively meet those strategies, and where what we are currently doing is or is not going to help us get there.
o I would set up a meeting with top Outreach administrative staff, and set specific goals and outcomes to be accomplished within one year, attach goals to benchmarks, and hold them accountable at the end of the year; conduct report-out to all Outreach staff at the end of the year.

o Clarify the core purpose of each unit and honor the areas where they logically overlap AS WELL AS those areas where they do not. For example, Continuing Education provides market-driven programs that can be short lived as long as they maximize net revenues while Cooperative Extension provides stakeholder-driven programs that must show impact and recover costs whenever possible. While both models are changing, the VP must help support staff to recognize the difference between a square peg/round hole situation versus a pushing the envelope experience.

Implications

According to this study, the only significant difference in organizational culture between Continuing Education representatives and Cooperative Extension representatives is their perceptions of infrastructure. This study revealed this finding but does not explore the deeper meaning of this difference. Additional research through focus groups may help reveal the reason(s) for their perceptual differences. Recommendations for practice and future research are included in this chapter.
Infrastructure Dimension

So, what does it mean that the only significant difference was discovered when examining the cultural dimension of infrastructure? The sixteen items included in the survey instrument for the infrastructure dimension were:

**Statement IV - 1: I am given the training and professional development I need to do my job.**

[Healthy 72.7% Neutral 11.7% Unhealthy 15.6%]

“High performing cultures ensure that employees not only have clear direction in terms of what is expected, but that they are also given the tools (equipment, knowledge, skills, etc.) to perform their jobs effectively. A positive response to this statement indicates that employees feel they are prepared to accomplish what is expected of them” (EMERGE International, 2005, p. 49).

**Statement IV - 2: Formal procedures and policies help me to do my job.**

[Healthy 63.6% Neutral 16.9% Unhealthy 19.5%]

“Formal procedures are set in place to outline the steps necessary for any function. It is important that employees have a clear understanding of what is expected and how things get done in the organization. When this occurs there tends to be a higher level of efficiency, better quality of products and services and higher levels of productivity” (EMERGE International, 2005, p. 50).

**Statement IV - 3: The current structure of the organization helps me do my job.**

[Healthy 40.3% Neutral 33.8% Unhealthy 26.0%]
“This response indicates that staff agree with or are comfortable with how the organization is structured. When the structure is clearly defined it typically encourages healthy communication, coordination and cooperation throughout. In other words, the workplace makes sense. Employees know who to go to for what, and frustration levels are kept at bay” (EMERGE International, 2005, p. 51).

**Statement IV - 4: Informal practices are not the norm.**

[Healthy 32.5% Neutral 46.8% Unhealthy 20.8%]

“This is an indication that formal policies and structures are providing clarity for employees. Although this is a healthy statement, this does not guarantee that the formal policies and structure are efficient. All too often organizations never take the time to revisit what has been documented, and, often it is determined that policies and procedures are outdated, no longer doing a good job of supporting the direction of work for employees” (EMERGE International, 2005, p. 52).

**Statement IV - 5: Proper planning is how things get done around here.**

[Healthy 57.1% Neutral 24.7% Unhealthy 18.2%]

“This is a good indication that the planning process is formalized, that formal plans do direct how the work gets done and that priorities are clear. Operating in this fashion can reduce the risk of employees reacting emotionally and increase the odds of making good, logical decisions. The “shoot-from-the-hip” approach is not the norm and employees will be less frustrated and confused if these situations are kept to a minimum. Priorities will be clear and employees will have a clear vision of what is important” (EMERGE International, 2005, p. 53).

**Statement IV - 6: Our current systems help us to do our work.**
“A healthy response here means that staff have more clarity around how things get done, there is more consistency and less room for error. High performing organizations have uncomplicated systems and procedures that are updated and help to reduce and/or eliminate the informal practices that often occur in organizations” (EMERGE International, 2005, p. 53).

Statement IV - 7: *We are good at implementation [achieving results]*.

“Planning and implementation typically go hand-in-hand. A healthy response here implies that the Outreach organization is good at planning, and, realizing the results. Staff are probably enjoying a high sense of job satisfaction as they see how the fruits of their labors are put to use. The results validate their efforts and since they can credit the organization for achieving those results, they probably feel a heightened sense of loyalty to their co-workers and to the organization” (EMERGE International, 2005, p. 54).

Statement IV - 8: *Technology is valued.*

“Information technology is having a tremendous impact on how we do our work and is literally transforming many organizational practices. Therefore, it is critical that technology be valued and seen as important to an organization’s success. The introduction of email into organizations has increased and improved the level of communication in organizations, but at the same time, has created a safe haven for employees who would rather confront issues through e-mail than through face-to-face dialogue. Not all issues were addressed face-to-face before e-mail, however, it may be
that e-mail warfare among colleagues has become the predominant way of dealing with issues. Technology has many benefits, but it also often arrives with hidden cautions that must be recognized and addressed” (EMERGE International, 2005, p. 55).

Statement IV - 9: Technology is seen as important to our success.

[Healthy 83.1% Neutral 11.7% Unhealthy 5.2]

“This is very important. With the shift in technology happening so quickly, organizations often forget that with these changes comes a learning curve, which needs to be taken into consideration during the planning process and development of project parameters. This reduces stress and frustration levels for employees. They will feel more comfortable with the change and more confident in applying the new technology. Also, technology is probably one of the fastest changing components in an organization and, if personnel get comfortable and embrace these changes, they are more apt to accept other changes occurring in the organization. One of the recurring themes of a high performing culture is their ability to be future-proof. One of the three critical elements to being future-proof is that technology is used to empower the front line” (EMERGE International, 2005, p. 56).

Statement IV - 10: The organization prepares me to work with new technology.

[Healthy 63.6% Neutral 18.2% Unhealthy 18.2% ]

“Like many terms we have heard over the years (empowerment, inclusion, etc.), ‘teamwork’ is critical to the success of any organization and is a best practice of high performing cultures. Teamwork is at the heart of great achievement. The question is not whether teams have value. The question is whether we acknowledge that fact and become better team players. Effective teams 1.) Involve more people and have the capacity to
generate more ideas, 2.) Maximize a leader's potential and minimize his/her weaknesses,
3.) Provide multiple perspectives thereby generating several alternatives; and, 4.) Share
the credit for victories and the blame for losses. This fosters genuine humility and
authentic community. Teams keep leaders accountable for the goal. Effective teamwork
is true interdependence” (EMERGE International, 2005, p. 57).

Statement IV - 11: Teams are part of the organizational culture at my location.
[Healthy 70.1% Neutral 10.4% Unhealthy 19.5%]

“This is a good indication that Outreach has developed a structured and consistent
process for managing organizational teams. It shows that your management team
supports your organizational teams and they, in turn, are focused and capable of
accomplishing the tasks set before them. This also demonstrates a high degree of
communication success within the teams and a high level of recognition when they do
well. Achieving results fosters pride in one’s work and a healthy camaraderie among the
team members. It forms a resilient bond that shares a ‘can-do’ attitude and energy that is
easily braced for more exacting challenges” (EMERGE International, 2005, p. 58).

Statement IV - 12: We have formal teams that achieve results.
[Healthy 51.9% Neutral 20.8% Unhealthy 27.3%]

“This is a positive statement for it shows that not only are people being
recognized and compensated for what they do, it underscores the fact that management
supports the teamwork concept. This sends a very strong message to the workforce and
contributes to a culture where teams are coveted, rather than dreaded. A healthy response
here communicates that employees believe that team efforts are valued within the
organization and that it is worth their individual efforts to be a viable part of the larger
team. Individual efforts are woven into the fabric for the greater good, yet recognition permeates back down to the individual. In other words, employees feel that working within a team is well worth their time” (EMERGE International, 2005, p. 59).

**Statement IV - 13:** We have a reward system that recognizes teamwork.

[Healthy 23.4% Neutral 27.3% Unhealthy 49.4%]

“Employees do not feel that the company’s policies reflect the organization’s values. This incongruence causes frustration for employees and does not provide clarity in terms of expected behaviors. Trust levels within the organization are negatively impacted. Employees may seek to disassociate themselves from the organization or, if they stay, they may hold back their best efforts” (EMERGE International, 2005, p. 60).

**Statement IV - 14:** Our organizational policies reflect our values.

[Healthy 49.4% Neutral 31.2% Unhealthy 19.5%]

“When these elements are in place, the employee is much more focused because there is a high level of clarity. And, simply stated, it saves them time and energy. This allows employees to feel confident in what they are doing. They trust the system, knowing they can be assured of positive results on a consistent basis. While this aspect may, at times, restrict more creative thinking, it also contributes to what can be thought of as a ‘safe’ culture” (EMERGE International, 2005, p. 61).

**Statement IV - 15:** There are clear strategies/procedures one must use to get things done here.

[Healthy 51.9% Neutral 28.6% Unhealthy 19.5%]

“In high performing cultures, bureaucracy is kept at bay and there is openness about all business matters. High performing organizations realize that bureaucracy can
create barriers and has significant impact on productivity levels. High performing leaders in these organizations also practice shared leadership. This does not mean that they abdicate to the workforce their role as leaders. What it does mean is that they see their relationships with all members of the organization as a partnership. They work in collaboration with each other, share honest information, encourage autonomy, share in the decision making process and hold everyone accountable” (EMERGE International, 2005, p. 62).

**Statement IV - 16: Bureaucracy does not create barriers for getting my job done.**

[Healthy 15.6% Neutral 18.2% Unhealthy 66.2%]

In high performing cultures, bureaucracy must be kept in check or productive energy may be drained through constant attempts to cut through the “red tape”. High performing organizations realize that bureaucracy can create barriers and has significant impact on productivity levels.

**General Discussion**

Under the Penn State University organizational structure at the time of this research study, the Division of Continuing Education was somewhat fragmented with central units and some of the directors of continuing education within the direct control of Outreach and many of the campus Continuing Education units falling under the direct supervision of the individual campus’ hierarchies. These structural differences could account for much of the dichotomy of the perceptions indicated through this study.
“With what Schein calls ‘the clearest test of culture formation’, shared history, the question is whether this history is deep and long enough” (Alvesson, 1993, p. 83). This is perhaps the key question to the future of a shared culture between Continuing Education and Cooperative Extension at Penn State. Has there been enough overlap, enough joint opportunities for action, enough time together to create a common or shared culture?

Alvesson asks the question, “How can we use culture in order to get a good combination of guidance/focus and openness, appreciating wholeness and depth, analytical and theoretical insight and experienced organizational life” (Alvesson, 2002, p. 13)? This may be a test for the leadership within Penn State Outreach. “Culture is often seen as affected by the leadership of in particular the founders…also of senior managers….Leaders are said to work on culture rather than to work within culture” (Alvesson, 2002, p. 108). However, according to Schein, “the only thing of real importance that leaders do is to create and manage culture” (Schein, 1985, p. 2).

Schneider et al. also suggest, “Managers can improve their organization’s effectiveness by changing their organization’s climate and culture, but the process for doing so is slow and difficult….We change very slowly because we must overcome the inertia of our own behavior first; only after we overcome that inertia do we actually begin to change in ways that others can see” (Schneider, 1994, p. 25). They make the analogy that cultural change is like launching a space shuttle. The large rocket engines ignite and burn generating enormous thrust and expending most of their energy before the craft slowly begins to overcome gravity. Likewise, it takes an enormous expenditure of energy to change an organization’s culture. It is likely that managers will not have much to show
for their effort until “inertia is overcome and the climate can get moving in new
directions” (Schneider, 1994, p. 26).

“Management cannot expect employees to focus their energies and competencies
only on what management says is important. Instead, employees will focus on what
management communicates through their behavior—through the decisions they make
about the practices and procedures and rewards employees experience. Whether on
purpose or by default, management is responsible for the climates and cultures that
determine how successful an organization will be” (Schneider, 1994, p. 28).

According to Trice and Beyer, “The major manifest consequence of rites of
integration is that potentially divergent subsystems increase their interaction with each
other during common participation in the rite, and thus revive shared feelings that bind
them together and commit them to the larger system” (Trice, 1984, p. 662). One current
example of an Outreach rite of integration is the Outreach Professional Development
Conference. This annual event involves all of Continuing Education and Cooperative
Extension in an opportunity to come together and share a common experience.

Based on Walker’s statement that true organizational change is manifested by a
change in behavior patterns and his contention that, “To alter that behavior, an
organization’s culture must be transformed. To do that, organizational design must be
changed. An organizational design is composed of current and past arrangements in
which agency elites have fashioned to contend with conditions imposed by their
environment” (Walker, 1986, p. 8). This researcher contends that Penn State Outreach
must consider changes to its structure in order to achieve culture change and remain
relevant into the future.
Changing the culture of an organization is not easily achieved. Extensive change in an organization, although the process may appear simple, is really quite difficult and laborious. As Clausewitz says of war:

The simplest thing is difficult. The difficulties accumulate and end by producing a kind of friction that is inconceivable unless one has experienced [such change]….Countless minor incidents–the kind you never really foresee–combine to lower the general level of performance, so that one always falls far short of the intended goal (Von Clausewitz, 1976, p. 84).

The most startling finding born out by the analysis of the data from this study was that the dimension of infrastructure was the only significant factor in explaining differences in perceptions of the organizational culture. The statements contained within the infrastructure dimension sought perceptions regarding such topics as opportunities for professional development, organizational structure, policies, technology, teamwork, reward systems, and bureaucratic barriers.

Those findings support the recommendation that Penn State Outreach consider placing more of the administrative oversight for Continuing Education units at the various campus locations within the Outreach organization. This proposed organizational change may be able to bring perceptions of culture of directors of continuing education, continuing education area representatives, and county extension directors into closer alignment.
During the data collection stage of this research study, several respondents from Continuing Education contacted the primary researcher to ask who was the intended leader when survey statements asked perceptions of “top leadership.” They did not know whether they should have been thinking about the vice president for Outreach, the campus executive officer at their location, or in some cases, their director of academic affairs. They were instructed to respond in the context of who they considered to be the top leader.

In March, 2005 the academic leadership council at Penn State unveiled a comprehensive plan titled, *Penn State’s Campuses and Organizational Structures: Building on the Past, Preparing for the Future*, in which a series of recommendations were generally in alignment and supported by the results of this study. One key recommendation was that the directors of continuing education at the campuses would report Outreach leadership. Outreach administrators would lead an initiative to re-focus Continuing Education on credit programming and the development of statewide, urban, and local relationships with key industry clusters and governmental agencies. “The vice president for Outreach will be designated as the University’s chief advocate and organizational leader for programs and approaches that will better reach adult learners, and to coordinate campus activities statewide with respect to non-traditional students and workforce development programs” (Penn State University, 2005).

The report stated, “adult students-those 24 years of age and older-will make up a growing proportion of all students involved in postsecondary education in the future” (Penn State University, 2005). The report also noted, “Continuing Education has been poorly coordinated on a statewide basis, with campus directors of continuing education
engaging in predatory practices, proposals to clients coming from multiple campuses with different prices, and generally presenting a picture of the University as a confusing and confused organization as we attempt to serve the public” (Penn State University, 2005). The budget lines of directors of continuing education would also migrate to the Office of the Vice President for Outreach, along with other processes and metrics, to re-focus Continuing Education and create a “more coordinated effort with other Penn State Outreach units such as Cooperative Extension” (Penn State University, 2005).

**Recommendations**

As a result of conducting this study the primary researcher offers several recommendations that may be of value to Continuing Education, Cooperative Extension, and Outreach at Penn State University.

**Recommendations for Practice**

One recommendation is to encourage the use of this study as an initial step in an ongoing process to assess the Outreach culture at Penn State. This researcher encourages Penn State Outreach to extend the results of this study either by embarking upon a longitudinal study of particular units within Outreach, or by conducting an organization-wide cultural assessment utilizing the Cultural Health Indicator instrument that would include all staff. In the event a full-scale cultural assessment of Outreach is conducted, another recommendation would be to include sufficient coding options in the survey
instrument to be able to differentiate staff by unit, location, category of employment, and other factors that may be useful in analysis. Due to the size of the survey population, this current study did not attempt to analyze the data by these categories because the cell populations would have been extremely low in some cases.

A cultural assessment of Outreach could be conducted with internal experts, however this researcher recommends that outside consultants conduct the survey, analyze the data, and share their complete findings with the entire Outreach organization. Open communication is necessary to effect lasting change. For an organization to understand its own strengths, weaknesses, opportunities, and threats and use those data to inform strategic planning, it must study and understand its own culture. There are two major areas of risk to consider – the cultural analysis may not be accurate, and the organization may ignore or refute feedback about its culture (Schein, 2004). Focus groups should be conducted to more fully understand the findings of this and subsequent research studies.

This researcher encourages Penn State Outreach to implement a continuous cycle of assessment, identify potential problems or opportunities, and then prioritize, and propose an action plan involving all members of the Outreach organization. It will be important to remember that “it takes a conscious attempt to show people how specific behaviors and attitudes have helped improve performance.” Also, culture change “requires that sufficient time be taken to ensure that the next generation of management really does personify the new approach” (Kotter, 1996, p. 14).

The field of survey-guided development offers several models for large-scale organizational change that Outreach administration may consider. A study by Covin (1992) identified 10 common intervention strategies from including survey feedback,
strategic planning, restructuring, culture awareness/change workshops, etc. Of 132 organizations in the study, 23 firms used only survey feedback. “In fact, one of the highest average success ratings was associated with survey feedback…This finding may be attributable to the fact that survey feedback, unlike other single intervention strategies, is commonly viewed as a very comprehensive intervention in and of itself” (Covin, 1992, p. 31). Survey-guided development uses a questionnaire to gather perceptions from individuals about how an organization is functioning. They goal of survey-guided development is to “improve the capacity of organization members to function effectively in accomplishing their day-to-day and longer range tasks” (Hausser, Pecorella, & Wissler, 1977, p. 1). Survey-guided development incorporates feeding back the survey results to the organization in a series of cascading meetings starting with the organization leadership and then incorporating their feedback into the next tier of meetings until the entire organization has been involved in the questionnaire and discussions.

The results of this study should be shared with the respondents, with Outreach leaders, and with other interested Outreach staff through a variety of forums. This researcher will share the findings of this study with the Outreach administrative leadership either individually or at a team meeting. Presentations during a Continuing Education Council meeting, County Extension Directors leadership conference, and the Outreach Professional Development Conference will provide opportunities to share research findings and receive feedback. Additional opportunities for research presentations may be available at future Outreach Scholarship conferences to reach a national audience of Outreach scholars, a national or regional University Continuing Education Association conference to reach Continuing Education scholars, or an
Epsilong Sigma Phi conference to reach a national audience of Cooperative Extension scholars.

**Recommendations for Future Research**

This study was limited in its scope and additional research is warranted. Whether at this institution or elsewhere, additional research is needed to overcome the limitations of this current study and to go beyond the scope of this study. This study surveyed participants occupying a narrow band of positions within Continuing Education and Cooperative Extension at a single institution of higher learning. Additional study is warranted either at this institution or elsewhere to assess the culture of other Outreach units.

The Cultural Health Indicator has become a valuable and respected assessment tool in business, industry, and public agencies for several years. This study broke new ground by applying the Cultural Health Indicator to higher education. Additional research incorporating the Cultural Health Indicator may bolster or refute the results of this study and provide a valuable tool for examining organizational culture issues in a new research population.

The Cultural Health Indicator examines perceptions of the overall health of an organization’s culture, however it does not identify culture type. Future research in Outreach organizations might consider examining their culture using the Organizational Culture Assessment Instrument based on Cameron and Quinn’s (1999) competing values framework to identify dominant culture type. Or, perhaps a multi-method study
incorporating both the Cultural Health Indicator and the Organizational Culture Assessment Instrument with distinct samples of the same population could indicate culture type and assess cultural health.

The coding of the instrument for this present study did not permit differentiation between Directors of Continuing Education and Continuing Education Area Representatives for the purpose of analysis. Further survey research to assess the culture of Outreach units should be coded so as many facets of the organization can be analyzed as are of interest to the researcher. The ability to assess cultural health and/or culture type across the strata of an organization will provide greater detail to enable organizational leaders to focus their attention and guide desired change interventions. Consider collecting and coding data to capture the perceptions of Outreach executives, directors, professional staff, and support staff to examine perceptions of organizational culture at all levels of Outreach.

This study was conducted as a one-point-in-time assessment; future longitudinal research is warranted in this field to study changes in perceptions and attitudes over time. Based on the recent report, *Penn State’s Campuses and Organizational Structures*, the organizational structure of Continuing Education at this university may change considerably which may render the findings of this study immediately obsolete. This researcher recommends this same study be replicated either in six months or one year to monitor any significant change in perceptions of cultural health during the interim.

Also, this study was limited to measuring perceptions rather than behaviors. Future research examining behaviors may delve deeper into the cultural context of the organization examined. This study was based on self-reported perceptions of the
respondents. Cook and Campbell (1979) suggest that research designs incorporating multi-method approaches result in stronger research. Future cultural assessments in Outreach organizations may benefit from the use of multi-method research designs. In general, more assessment of organizational culture would provide information to assist leaders in designing the future of the organization.

Further study is warranted to examine the effect of length of tenure of the workforce on the health of an organization’s culture. The results of this study indicated over one-third of Continuing Education personnel had been employed by their unit fewer than five years as compared to five percent of Cooperative Extension with the same employment history. Does length of employment influence perceptions of organizational culture? Would that influence be positive or negative?

Another suggestion for future research would be to gather data so they can be isolated to different sectors of the survey population and compare those scores to various other sectors. Future studies examining organizational culture in Outreach organizations should include participants from multiple critical factions within the various organizational units. Future research opportunities to not only assess culture in Outreach units but to also understand the strength of culture type exist. This current study did not endeavor to explore culture strength.

This study may be replicated with an increase in the size of the population by including the total staff of Continuing Education and Cooperative Extension. Additionally, the total staff of the remaining Outreach units at Penn State University could be included in the assessment. Also, the total staffs from Outreach organizations at multiple universities could be surveyed.
This current study did not attempt to do anything more than identify the perceptions of the health of the organizational culture for Continuing Education and Cooperative Extension at Penn State University. Additional research could also include variables based on the method of funding different units within Outreach organizations to view the impacts on the cultural elements.

Schein identifies several different research streams that influence how we perceive the concept of organizational culture including survey research, analytical descriptive, ethnographic, historical, and clinical descriptive. This research study utilizes survey research. Additional research using other methodologies may be in order.
References


Uzzo, J. P. (2002). *A comparison of organizational culture between administrative affairs administrators and academic affairs administrators at selected institutions of higher education*. University of Oklahoma, Norman, OK.


Appendix A

2004 Cultural Health Indicator Survey

Penn State Questions

Instructions: Please rate the extent to which you agree or disagree with each of the statements below.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Not Sure</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
</tr>
</thead>
</table>

Dimension I - Leadership

Section 1 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.

1. The vision of the Outreach organization is clear to me.
2. The values of the organization are very clear to me.
3. Our Outreach mission is clear.
4. I understand that what I do supports our purpose/mission.
5. I understand my unit's goals.
6. Consistency exists in the statements and actions of top leadership.
7. I trust top leadership to do the right thing.
8. Top leadership 'walks the talk' about people being the most important asset.
9. I see the person I report to living our organization values every day.
10. I see top leadership living our organization values everyday.
11. The person I report to cares about my future with the organization.
12. The vice president and top leadership appear to interact well with each other.
13. Top leadership values change.
14. What employees know, not whom they know is important.
15. I am confident that the information from this assessment will be shared and will help us improve.

Save Answers

Dimension II - Relationships

Section 2 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.

1. Everyone in my unit is treated the same.
2. I like my coworkers.
3. I trust my coworkers.
4. I work well with my coworkers.
5. We care about each other in my unit.
6. I trust the person I report to.
7. Positive working relationships exist between the person I report to and me.
8. All units are encouraged to work together.
9. Our unit works well with other Outreach partners.
10. When I have an issue with one of my co-workers I go directly to them to discuss it.
11. When difficulties or disruptions arise people are quick to address and fix them.
12. The person I report to is not afraid to deal with people issues when they arise.
13. We have positive relationships with our participants and client organizations.
14. We care about the community we serve.

Save Answers

**Dimension III - Communication**

Section 3 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.

1. Clear communication is a high value of this organization.
2. I get frequent feedback from the person I report to on how I am doing.
3. People listen to one another.
4. The person I report to listens to me.
5. I get the information I need to do my job.
6. The rumor mill/grapevine is not how I get my information.
7. Communication between Outreach units is very good.
8. Information about the organization is shared at all levels.
9. I trust the information that I receive from my supervisor.

Save Answers

**Dimension IV - Infrastructure**

Section 4 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.

1. I am given the training and professional development I need to do my job.
2. Formal procedures and policies help me to do my job.
3. The current structure of the organization helps me do my job.
4. Informal practices are not the norm.
5. Proper planning is how things get done around here.
6. Our current systems help us to do our work.
7. We are good at implementation [achieving results].
8. Technology is valued
9. Technology is seen as important to our success.
10. The organization prepares me to work with new technology.
11. Teams are part of the organizational culture at my location.
12. We have formal teams that achieve results.
13. We have a reward system that recognizes teamwork.
14. Our organizational policies reflect our values.
15. There are clear strategies/procedures one must use to get things done here.
16. Bureaucracy does not create barriers for getting my job done.

Save Answers

**Dimension V - Involvement and Decision Making**

Section 5 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.

1. I know how I can impact the future of our organization.
2. I am encouraged to contribute to our future.
3. I am responsible for the decisions surrounding my work.
4. I know how I can influence decisions that affect my work.
5. I know what is expected of me.
6. The person I report to includes me in changes that affect my work.
7. I am encouraged to give my opinion.
8. I am given the authority to make decisions.
9. I feel valued for the contributions that I make.
10. Decisions that I make stand.
11. When the person I report to makes decisions, they stand.
12. We have a structured process for making decisions.
13. This organization makes effective decisions.
14. I am involved in the decision making process when it has a direct impact on my job.

Save Answers

**Dimension VI - Change Management**

Section 6 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.

1. Top leadership values creativity at my location.
2. Top leadership values risk.
3. Top leadership values diversity.
4. Top leadership values innovation.
5. All employees are held accountable for their actions.
6. Creativity is rewarded.
7. I am rewarded for taking risks.
8. I am rewarded for challenging the status quo.
9. Innovation is rewarded.
10. Conflict is viewed as positive.
11. Changes are created to make my job easier.
12. Change is based on sound decision-making.
13. I receive recognition for the work that I do.
14. We spend time learning from change efforts that did not succeed.
15. The person I report to encourages me to learn new things.
16. I am given the opportunity to try new things.
17. I think the Outreach partnership is a success.

Save Answers
Dimension VII - Finance
Section 7 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.
1. I understand how our organization’s budget is funded.
2. I understand and can articulate our business and financial strategies.
3. Leadership provides me with learning tools to clearly understand our business and financial strategies.
4. I understand how my role supports and drives the financial success of the organization.
5. Leadership provides me with the tools necessary to see how my actions and decisions impact the financial success of the company.
6. I feel confident that I can present ideas and suggestions with business and financial rationale.
7. The person I report to provides me with the financial rationale behind our organizational strategies, initiatives and decisions.
8. I feel confident that the person I report to understands how our organization budgets and financials work.
9. Leadership consistently shares the financial rationale behind the decisions that are made.
10. We provide tools to help our current and future leaders gain a sound understanding of our organization from a financial perspective.
11. When working with my co-workers to resolve organizational issues or improve processes, we always discuss the financial implications of our topic.
12. The leadership team views me as a business resource and contributor beyond my functional role.
13. I am willing to make difficult business decisions because I clearly understand and can explain the strategic and financial implications of the decision.

Save Answers

Dimension VIII - Cultural Descriptors
Section 8 out of 9, please click on the Save Answers button when done to save your answers and proceed to the next section.
1. Please select as many words as possible that reflect your experiences within your organization. AT LEAST ONE MUST BE CHOSEN
   Accountability
   Authentic
   Autonomy
   Bureaucracy
   Collaboration
   Clarity
   Community Minded
   Consistent
We are very interested in both the quality and quantity of your responses. The richer your responses - the richer the feedback will be. These are required fields, so if for any reason you are unable to answer the following questions, please type in 'No Comment'.

Please hit the 'Save Answer' button after each question, this way if you need to return to the survey before submitting the entire section, those answers will be saved. Thank you.

1. If you vice president of Outreach for the day, what is the one thing that you would change and how?

   Save Answer

2. Please complete the following statement - We would be more successful if we...

   Save Answer

3. What are the three things that excite you about what is currently going on in your organization?

   Save Answer

Dimension X - Demographics

Please click on the Save Answers button when done to save your answers and proceed to the next section.

Please indicate which unit you work in.

   ___ Continuing Education
   ___ Cooperative Extension
Which age category best describes you?
____ 34 years and under
____ 35 - 54 years
____ 55 years and over

What is your gender:
____ female
____ male

What race best describes you?
____ White
____ African American
____ American Indian
____ Hispanic
____ Asian
____ Other

Please check the highest level of formal education that you have attained.
____ Some university training
____ Bachelor's degree
____ Master's degree
____ Doctoral degree
____ Other

How many years have you been a member of your organization?
____ 5 years or less
____ 6-15 years
____ 16 years or more

How many years have you been in your current position?
____ 5 years or less
____ 6-15 years
____ 16 years or more
## Appendix B

### Regression Tables for Communication, Involvement and Decision Making, and Change Management Dimensions

Table B-1: Regression of Communication Perceptions on Six Demographic Variables

<table>
<thead>
<tr>
<th>Model</th>
<th>Unstandardized Coefficients</th>
<th>Standardized Coefficients</th>
<th>95% Confidence Interval for b</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>b</td>
<td>Std. Error b</td>
<td>Beta</td>
</tr>
<tr>
<td>Constant</td>
<td>2.984</td>
<td>.532</td>
<td>5.607</td>
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<tr>
<td>Education (bachelor vs graduate degree)</td>
<td>-.043</td>
<td>.174</td>
<td>-.027</td>
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<tr>
<td>Age (&lt;55 yrs vs 55 or older)</td>
<td>.003</td>
<td>.146</td>
<td>.003</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>-.176</td>
<td>.164</td>
<td>-1.48</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>.093</td>
<td>.192</td>
<td>.066</td>
</tr>
<tr>
<td>Organization (Cont. Ed. vs Coop Ext)</td>
<td>-.240</td>
<td>.133</td>
<td>-.203</td>
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<tr>
<td>Gender (Male vs Female)</td>
<td>.011</td>
<td>.127</td>
<td>.010</td>
</tr>
</tbody>
</table>

a. Model Summary: F=1.101; df=6/89; p=.365; R square=.069; Adjusted R square=.007

b. Note: The base level/category is reported first in ( ) for the independent variables
### Table B-2: Regression of Involvement and Decision Making Perceptions on Six Demographic Variables$^a$

<table>
<thead>
<tr>
<th>Model</th>
<th>Unstandardized Coefficients</th>
<th>Standardized Coefficients</th>
<th>95% Confidence Interval for b</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>b</td>
<td>Std. Error b</td>
<td>t</td>
</tr>
<tr>
<td>Constant</td>
<td>2.083</td>
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<tr>
<td>Education (bachelor vs graduate degree)</td>
<td>.285</td>
<td>.187</td>
<td>.162</td>
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<tr>
<td>Age (&lt;55 yrs vs 55 or older)</td>
<td>.081</td>
<td>.158</td>
<td>.055</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>-.154</td>
<td>.177</td>
<td>-.118</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>-.021</td>
<td>.208</td>
<td>-.014</td>
</tr>
<tr>
<td>Organization (Cont. Ed. vs Coop Ext)$^b$</td>
<td>-.209</td>
<td>.143</td>
<td>-.162</td>
</tr>
<tr>
<td>Gender (Male vs Female)</td>
<td>.039</td>
<td>.138</td>
<td>.108</td>
</tr>
</tbody>
</table>

a. Model Summary: F=1.40; df=6/89; p=.225; R square=.086; Adjusted R square=.024

b. Note: The base level/category is reported first in ( ) for the independent variables

### Table B-3: Regression of Change Management Perceptions on Six Demographic Variables$^a$

<table>
<thead>
<tr>
<th>Model</th>
<th>Unstandardized Coefficients</th>
<th>Standardized Coefficients</th>
<th>95% Confidence Interval for b</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>b</td>
<td>Std. Error b</td>
<td>t</td>
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<tr>
<td>Constant</td>
<td>1.795</td>
<td>.541</td>
<td>3.320</td>
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<tr>
<td>Education (bachelor vs graduate degree)</td>
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<td>.176</td>
<td>.185</td>
</tr>
<tr>
<td>Age (&lt;55 yrs vs 55 or older)</td>
<td>.130</td>
<td>.148</td>
<td>.092</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>-.166</td>
<td>.167</td>
<td>-.134</td>
</tr>
<tr>
<td>Years in organization (&lt;6 yrs vs 6 or more yrs)</td>
<td>.349</td>
<td>.195</td>
<td>.237</td>
</tr>
<tr>
<td>Organization (Cont. Ed. vs Coop Ext)$^b$</td>
<td>-.291</td>
<td>.135</td>
<td>-.236</td>
</tr>
<tr>
<td>Gender (Male vs Female)</td>
<td>.120</td>
<td>.129</td>
<td>.097</td>
</tr>
</tbody>
</table>

a. Model Summary: F=1.90; df=6/89; p=.090; R square=.113; Adjusted R square=.054

b. Note: The base level/category is reported first in ( ) for the independent variables
Appendix C

Human Subjects Approval

Date: September 9, 2004
From: Jodi L. Mathieu, IRB Administrator
To: Michael J. Martin

Subject: Review of Proposal - Expedited (IRB #9354)
Approval Date: September 1, 2005
“Continuing Education and Cooperative Extension: A Comparative Assessment of Organizational Culture”

The Social Sciences Institutional Review Board has reviewed and approved your proposal for use of human participants in your research. By accepting this decision, you agree to obtain prior approval from the IRB for any changes to your study. Unanticipated participant events that are encountered during the conduct of this research must be reported in a timely fashion.

Enclosed is the dated, IRB-approved informed consent to be used when recruiting participants for this research. Participants must receive a copy of the approved informed consent form to keep for their records.

If signed consent is obtained, the principal investigator is expected to maintain the original signed consent forms along with the IRB research records for this research at least three (3) years after termination of IRB approval. For projects that involve protected health information (PHI), records are to be maintained for six (6) years. The principal investigator must determine and adhere to additional requirements established by the FDA and any outside sponsors.

If your study will extend beyond the above noted approval expiration date, the principal investigator must submit a completed Continuing Progress Report to the Office for Research Protections (ORP) to request renewed approval for this research.

On behalf of the committee and the University, thank you for your effort to conduct your research in compliance with the federal regulations that have been established for the protection of human participants.

JLM-ak
Institutional Review Board
CEC

Please Note: The ORP encourages you to subscribe to the ORP listserv for protocol and research-related information. Send a blank email to L-ORP-Research-L-subscribe-request@lists.unc.edu.
Appendix D

Cover E-Mail Letter, E-Mail Letter with URL to Survey Instrument and Informed Consent, and Reminder E-Mail

Cover E-Mail Letter

Colleagues:

As a part of his Ph.D. dissertation, Michael Martin, a member of our Outreach staff, is conducting a survey to assess our organizational culture in continuing education and cooperative extension. You have been selected to participate in this survey. Your decision to participate in this study is voluntary. Please take the time to complete the questionnaire as soon as possible.

Michael will send you the URL and log on codes in a separate email message within a few days. The survey does not ask for any information that would identify who the responses belong to. Your responses are recorded anonymously. In the event of any publication or presentation resulting from the research, no personally identifiable information will be shared because your name is in no way linked to your responses.

All questions and concerns regarding this study should be directed to:
Michael J. Martin
Ph.D. Candidate
Workforce Education and Development
College of Education
507 Keller Building
University Park, PA 16802-1308
Email: mmartin@psu.edu
Phone: 814-863-2754
Fax: 814-863-2765

Thank you in advance for your cooperation in making this study a success.

Dr. Craig Weidemann
Vice President for Outreach
E-Mail Letter with URL to Survey Instrument and Informed Consent

Dear Colleague:

Recently Dr. Craig Weidemann, Vice President for Outreach, sent an email informing you that I am conducting a survey to assess our organizational culture in Continuing Education and Cooperative Extension. Dr. Weidemann encouraged you to complete the survey.

This research might provide a better understanding of how Continuing Education and Cooperative Extension may be able to partner at Penn State. This information could help plan programs and make Outreach services better. This information might assist in strengthening Penn State Outreach.

Please take the time to complete this survey and participate in this doctoral dissertation project. Completing the survey indicates your implied consent. Please see the complete informed consent form below.

To proceed to survey click on this hotlink: http://www.culturalhealthindicator.com/chi/ or paste this URL into your Internet browser. The log on code and password are both: psusurvey2004

The survey will take approximately 30 minutes to complete.
You decision to be in this research is voluntary.
You can stop at any time.
You do not have to answer any questions you do not want to answer.
Remember, your input is important.

If you would prefer to complete a paper survey, or if you have any questions about the survey, Contact:

Michael J. Martin  
Ph.D. Candidate  
Workforce Education and Development  
College of Education  
507 Keller Building  
University Park, PA 16802-1308  
Email: mmartin@psu.edu  
Phone: 814-863-2754  
Fax: 814-863-2765

Thank you in advance for your participation.
Sincerely yours,
INFORMED CONSENT FORM FOR SOCIAL SCIENCE RESEARCH
The Pennsylvania State University

The Pennsylvania State University
Office for Research Protections
Approval Date: 10/26/04 - J. Mathieu
Expiration Date: 9/1/05 - J. Mathieu
Social Science Institutional Review Board

Title of Project:
"Continuing Education and Cooperative Extension: A Comparative Assessment of Organizational Culture"

Principal Investigator:
Michael J. Martin, Graduate Student
507 Keller Building
University Park, PA 16802
(814) 86302754; mmartin@psu.edu

Advisor:
Dr. William J. Rothwell
301A Keller Building
University Park, PA 16802
(814) 863-2581; wjr9@psu.edu

1. **Purpose of the Study:** The purpose of this research study is to assess and compare the organizational cultures of Continuing Education and Cooperative Extension at Penn State to explore the compatibility of a partnership between these units.

2. **Procedures to be followed:** You will be asked to answer 98 questions on a survey. The questions will encompass several dimensions of organizational culture including: leadership, relationships, communication, infrastructure, involvement and decision making, change management, finance, and cultural descriptors.

3. **Discomforts and Risks:** There are no known risks in participating in this research beyond those experienced in everyday life. Some of the questions are personal and might cause discomfort.
4. **Benefits:** You might learn more about yourself and your work unit by participating in this study. You might have a better understanding of your organization's culture. You might realize that others have had similar experiences as you have.

This research might provide a better understanding of how Continuing Education and Cooperative Extension may be able to partner at Penn State. This information could help plan programs and make Outreach services better. This information might assist in strengthening Penn State Outreach.

5. **Duration:** It will take about 30 minutes to complete the questions.

6. **Statement of Confidentiality:** The survey does not ask for any information that would identify who the responses belong to. Your responses are recorded anonymously. The Office for Research Protections and the Social Science Institutional Review Board may review records related to this project. In the event of any publication or presentation resulting from the research, no personally identifiable information will be shared because your name is in no way linked to your responses.

7. **Right to Ask Questions:** You can ask questions about this research. Contact Michael Martin at 814-863-2754 with questions. If you have questions about your rights as a research participant, contact The Pennsylvania State University's Office for Research Protections at (814) 865-1775.

8. **Compensation:** Participants will receive no compensation for participating in this study.

9. **Voluntary Participation:** Your decision to be in this research is voluntary. You can stop at any time. You do not have to answer any questions you do not want to answer.

You must be 18 years of age or older to take part in this research study. If you agree to take part in this research study and the information outlined above, please click the "continue" button to proceed to the survey.

Please print a copy of this consent for your records.
First Reminder E-Mail Letter

Dear Colleague:

Last week you received information about the Cultural Health Indicator Survey via email. The survey seeks your views about our organizational culture. You were selected for participation because you play a critical role in our organization.

If you have already completed the survey, please accept our sincere thanks. If not, please do so today. It is critical that your responses be included so that the results accurately represent the opinions and experiences of Outreach personnel. To proceed to survey click on this hotlink: http://www.culturalhealthindicator.com/chi/ or paste this URL into your Internet browser. The log on code and password are both:
psusurvey2004

If you did not receive the survey information, or if it got misplaced, please call Michael Martin, the study's principal investigator, at (814) 863-2754. I will email the information to you immediately. I greatly appreciate your cooperation in making this project a success.

Sincerely,

Michael J. Martin
Ph.D. Candidate
Workforce Education and Development
College of Education
507 Keller Building
University Park, PA 16802-1308
Email: mmartin@psu.edu
Phone: 814-863-2754
Fax: 814-863-2765
Dear Colleague:

I am writing to you again about the Cultural Health Indicator Survey seeking your views and opinions on our organizational culture.

If you have not already done so, I urge you to complete the online survey as quickly as possible. To proceed to survey click on this hotlink: http://www.culturalhealthindicator.com/chi/ or paste this URL into your Internet browser. The log on code and password are both: psusurvey2004

We are conducting this study because of our commitment to the ongoing success of our educational mission. It is my belief that those working with continuing education and cooperative extension will benefit greatly from an evaluation of our organizational culture. I also strongly believe that your input is critical because of the key role you play within continuing education and cooperative extension.

The usefulness of the results, however, will depend on how accurately we are able to represent the experiences of people like you. Outreach needs your responses because you may have different experiences and views than those who have completed the survey.

We would like to ensure that your responses are represented. In the event that you misplaced the survey information, please call Michael Martin, the study's principal investigator, at (814) 863-2754. He will email the information to you immediately.

Thank you in advance for your cooperation in making this project a success.

Sincerely,

Michael J. Martin
Ph.D. Candidate
Workforce Education and Development
College of Education
507 Keller Building
University Park, PA 16802-1308
Email: mmartin@psu.edu
Phone: 814-863-2754
Fax: 814-863-2765
Appendix E

Panel of Experts

James F. Cambell, Director
Outreach Operations
Continuing and Distance Education
Pennsylvania State University
118 Keller Building
University Park, PA 16802

William G. Curley, Senior Director
Statewide Continuing Education
Outreach Operations
University Outreach
Pennsylvania State University
118 Keller Building
University Park, PA 16802

G. Michael McDavid, Regional Director
Northeast Cooperative Extension Region
Penn State Wilkes-Barre
Nittany Court F
Lehman, PA 18627

David T. Rynd, Regional Director
Northwest Cooperative Extension Region
Penn State Shenango
147 Shenango Drive
Sharon, PA 16146
INSTRUMENT OVERVIEW:

The Cultural Health Index is predicated on a series of theories present in the fields of Organizational Psychology, Social-Cultural Anthropology, Clinical Psychology and Business Systems Development. These theories are:

1. ORGANIZATIONAL PSYCHOLOGY:
   Change Management Theories:

   A. *The Williams Congruence Development System* TM that focuses on the process of development based on issues of balance and alignment. This system also focuses on the equal parameters of employee and organizational beliefs, employee and organizational values and the strategies developed from underlying beliefs. For the Williams Process, the key component is a “Systems Thought and Action Process” that focuses on a *Systems Connection Strategy* TM and a *Process Connection Strategy* TM. This system has been developed by Dr. Lloyd C. Williams, CPCM - Managing Partner of Consulting Partnership Systems.

   B. *The Gibb Trust Development System* is based on issues of trust versus fear. Jack Gibb’s model, found in the book “Trust: A New View of Personal and Organizational Development” addresses issues of Trust Development versus Fear Development and the impact of trust versus fear on organizational strategies. Gibb believed that intra psychic issues always superceded issues of organizational strategy. Gibb stated that without clear understanding of the role of people within organizations, organizations create fear within the employees - either as a stance.
of control or a stance of legitimate authority. In either case, where fear drives - employees and organizations lose.

C. The Senge System of Systems Management looks at personal development and organizational development based on a five principle approach to organizational understanding and organizational learning. Peter Senge’s approach requires consistency in Personal Thinking, Personal Mastery, Systems Learning, Team Learning and other factors as critical to systems change.

D. The Nadler System of Change is a process model for change that focuses on differing connected organizational components that must move in tandem with one another in order for organizational movement to occur. Nadler believes that change is best accomplished through planned structural development. Without that development, an excess of variables crowd organizational thinking and behavior, creating more disruption and confusion.

E. The Minuchin System of Systems Development states that change is only a “human dynamic” and thus all organizational change must be based on the actions of people; not the process of organizational rules, strategies, operational practices or legal frames. These frames are created to control and manipulate organizational entrepreneurship. Minuchin therefore believed that all organizational work was driven by “family dynamic processes”. The critical component of this form of organizational thinking is the “giving of life” to an inanimate entity. Minuchin therefore started the process of humanity and humanness in the corporate arena.

F. Industrial Psychology critical to testing and measurement, selection and placement, classification, prediction, suppressor variables and cross validation have guided the development of numerous instruments and scoring sheets. Historically, all testing and measurement instruments in Personnel, Human Resources and work effectiveness were created from this discipline approach.

2. SOCIAL - CULTURAL ANTHROPOLOGY: Functionalism and Industrial Anthropology are two critical anthropological issues of change and development. Functionalism in anthropology regards culture as an integrated system. It posits that one key aspect of culture must be related to other aspects of culture to create integration between the components of a system. Industrial Anthropology focuses on
ethnographic [long term analysis] of issues to ensure that a systemic description of the “social organization” is equally valid to the “industrial working group of an organization”. Issues of Scientific Management Summ, Action Thought (Weber and Freire), Systems Theory (Parsons and Bertalanffy), Expectation Theory (Lewin and Tolman), Needs Theory (Maslow and Murray), Influence Leadership Theory (Lewin), Exchange Theory (Homans and Blau), Resource Dependence Theory (Blau, Emerson and Merten), Conflict Theory (Max, Simmel), Decision Making Theory (Simon and March), Bureaucracy Theory (Weber), Technology Theory (Marx), Contingency Theory (Fiedler) and Change Theory (Williams and Gibb) drive all aspects of industrial anthropology.

The premise of all these theorists is that an organization is “a socio-cultural system embedded in a larger sociocultural environments”. Therefore, the management culture of the organization is not necessarily the organizational culture. The required balance becomes a blending of management culture and organizational culture to create a new cultural strategy for working together.

Organizational life is more fluid than a linear view of organizational actions. Organizational decisions must be predicated on the ever-changing issues of organizational meaning, positions, statuses, barriers and traps. Therefore, when using anthropological strategies, one must look at not only what happens, but what it means. Ambiguity and uncertainty are therefore the key areas for discovery in organization.

3. CLINICAL PSYCHOLOGY:
Human Development Theory:
Maslow’s Hierarchy of Need Theory focuses on the personal priorities that drive human thought and action.

Psychotic Disorders as applied to organizations is key to long term strategy development. One can discover what needs to occur within an organization; however, change is driven by the ability of people to make personal shifts in their thinking and behavior. The issues for consideration are the following:

1. Anti-social behavior
2. Anxiety - elation psychosis
3. Acute-chronic distinction disorders
4. Acute distonic reactions
5. Altered states of consciousness
6. Attention- deficit hyperactivity
7. Behavior Therapy
8. Bipolar dysfunction
9. Brain imaging techniques
10. Counter transference
11. Cross cultural studies
12. Deficit Syndrome
13. Depersonalization Disorder
14. Double Bind Theory
15. Group Psychotherapy
16. Illogical Thinking
17. Narcissistic Personality Dysfunction
18. Process - Reactive Dysfunction
19. Cognitive Studies
20. Thought Broadcasting and Thought Disorders

Each of these theories undergird the development of the Instrument for analyzing cultures. Each clinical issue in one way or another creates areas of dysfunction among people within organizations. The extent to which organizations can create consistency and balance in the planning and performance of the work enhances the degree of personal or employee balance.

4. BUSINESS SYSTEMS DEVELOPMENT:
   A. Organizational Diagnosis that looks at:
      1. Structure [Division of Labor, Departmentalization, and Organizational Type]
      2. Strategy [Business Definition, Success Factors, Competitive Analysis, Business Plan]
      3. Tasks [Skill Requirements and Competence]
      4. Decision Support Systems [Planning, Control and Budgeting Information]
      5. Human Resource Systems [Demographics, Skills, Motives, Expectations, Recruitment-Selection and Training and Development]
      6. Reward Systems [Compensation, Promotions and Opportunities for advancement] as the primary source for understanding organizational Performance Outputs.

This diagnosis process focuses on meeting performance objectives. The performance objective represents the “processes” ability to guide organizational adaptability, stability and innovation.

B. Organizational Economic Theory focuses on the Thought Issues of Organizational Administrative Management and Organizational Fiscal Development. This is key to the issues of organizational valuing strategies and how those strategies foster long term business development. Key to this issue is misalignment that occurs because of economic focus.

C. Contingency Theory focuses on organizational energy, throughput, output, entropy and systems evolution.

D. Transformation Assumption Theories focus on the human understanding of
business issues. The assumptions are:

1. Everything is connected
2. The whole organizes the parts
3. We are co-creators with life.
4. Harmony and Integration follows alignment with life
5. The paradigm shift is now

These are the theories that have driven the development of the Cultural Health Index. These theories impacted both the development and the analysis of the instrument that is to follow. Each user of the instrument comes from some theoretical space, whether consciously understood or unconsciously acted upon. Knowing your theoretical perspective empowers your use of the instrument for organizational diagnosis and analysis.

DESCRIPTION OF THE INSTRUMENT:

The Cultural Health Index is a modified Survey and Phenomenological Inquiry instrument. This instrument is a qualitative research design to ensure that more in-depth data is obtained. The instrument and its design are qualitative in that the Critical Incident Technique (CIT) describes the experiences of respondents and their feelings to a specific occasion. The technique was also used as it is appropriate for group setting analysis, computer textual analysis and self disclosure processes.

The Cultural Health Index, therefore, seeks to generate Interpretive consumer research within a marketing paradigm and provide a measurement in a cross-cultural environment to understand survey translation issues. Methodological issues centering on the trustworthiness of this type of research are revealed suggesting an inclusive rather than exclusive approach to data gathering and data inquiry.

The Cultural Health Index is composed of one hundred questions and/or thematic statements that yield the lived experiences of the respondents to the survey. The instrument is divided into sections to focus explicitly on the lived experiences of respondents in categories deemed critical to organizational performance and success by Emerge and Collaborative Consulting. Each section describes respondents’ perspectives of organizational concerns – such as Governing Principles – to create a visual or systemic picture of the organizational health status.

METHODOLOGY USED IN THE VALIDATION OF THE INSTRUMENT.

This is a Qualitative Research Instrument. A qualitative Instrument focuses on the human judgments and perceptions as it studies human behavior in its natural settings. Qualitative studies attempt to make sense of or interpret
phenomena in terms of the meanings people bring to them. Qualitative research involves the studied use and collection of a variety of empirical materials – case Instrument, personal experience, introspective, life story, interview, observational, historical, interactional and visual texts – that describe routine and problematic moments and meanings in individual’s lives (Patton, 1990, 1980, Qualitative Evaluation and Research Methods, Sage Publications, Newbury Park, California, pp. 40-44.)

The method for use in this Instrument is a phenomenological historiography process. A phenomenological historiography instrument is not necessarily a methodological choice, instead it is a choice of objects to be studied. It tells a story of a group of persons who are alike in demographics and focus. It is also a phenomenological historiographic instrument because the desire is to understand more fully the unique characteristics of a given entity – managers and executives in an organization. The most unique characteristic of the instrument is that it becomes both the process of our learning and the product of the learning. In effect, the organizational response itself is of interest. The technique for use in the analysis and interpretation of the data was a Phenomenological Inquiry process. The specific technique was a Thematic Analysis as applied to a representative group using the Modified Van Kaam Method by Moustakas. It is identified as a process of phenomenological inquiry because the steps undertaken are equally as important as the findings of the process. In addition, what the researcher experiences is equally important as a lived experience to the actual findings in each step of the process. (M. Q. Patton, Qualitative Evaluation and Research Methods, pp. 53, 55, 98-102.)

This technique is used because it allows detailed descriptions of situations, events, people, interactions and observed behaviors, in verbal or written form; direct quotations from people about their experiences, attitudes, beliefs and thoughts; excerpts of entire passages from documents, correspondence, records and case histories. It should identify the value of lived experiences in the determination of organizational action. Lived experiences represent qualitative measurements and represent raw data from the empirical world (Patton, 1980, 1990.) This method was selected because it allows for the use and collection of people stories, accounts and narratives which describe turning-point moments in individuals’ lives. Paraphrasing Patton, the collection comes from interviews, written reports, focus group discussions and other forms of communication that can inform the researcher of the live experiences of participants in an established parameter. The method is used to explain phenomena that can be generalized to the larger population. It also allows for the utilization and delineation of emerging and diminishing themes within a population regarding organizational rules and practices to explain where success or failure occurs.
Utilization of this method and technique, then focused on the revelations of congruence factors (developed by Lloyd C. Williams, D.Min., Ph.D., Organizational Psychologist and Consultant) found in the written stories, rules and practices of the participants. Where there is alignment between critical emergent congruence themes in people within the organization with the characteristics of the cultural health model (based on cultural health factors identified by Emerge and Collaborative Consulting), the research will have answered the questions of the usefulness of the Cultural Health Index Model and the Cultural Due Diligence Process.

Moustakas in Phenomenology Research Methods (Sage, Thousand Oaks, California 1994, p. 44) states that “perception is regarded as the primary source of knowledge, the source that cannot be doubted.” Intentions, united with sensations, make up the full concrete act of perceptions (p. 52).

Merleau-Ponty (1962) says, “perception opens a window onto things”. This means that it is directed towards a truth in itself in which the reason underlying all appearances is to be found. The tacit assumption of perception is that every instant experience can be coordinated with that of the previous instant, and that of the following, my perspective with that of other consciousness is one unbroken text, that what is now indeterminate for me, could become determinate for more complete knowledge.

Moustakas’ approach has heretofore focused only on the perceptions of the person, not a group of persons. The utilization of this method for a category of persons – managers and executives – to describe a composite of their lived experiences to project impacts on organizations has not been done. Therefore, this approach represents a new use of the method.

The premise of this Instrument is that the thematic analysis of the interactions of the managers and executives will reveal congruence characteristics, through the stories and accounts of the respondents, that describe the managerial cultural health determinants in an analysis of patterns established in the data that reveal organizational and personal themes. The theme analysis identifies underlying core statements or experiences, that enhance the opportunity and perceived mindset of managers, to drive their decision making, enhance their people behavior, frame or alter structure development, establish environmental settings and acknowledge satisfaction parameters. Each phase presented is a further deductive process of identifying patterns, identifying themes, evaluating primary, secondary and tertiary themes that inform the actions of people and systems. The same data were evaluated against the characteristics of the congruence model to identify alignment or lack of alignment. The intent was to determine
what characteristics of the congruence model impact cultural health in organizations and people and what factors do not.

**DESIGN OF THE INSTRUMENT**

Executives and managers, in a representative organizational case, revealed lived experiences that were used to identify information about cultural health success determinants of organizational behavior as they relate to the cultural health characteristics developed in the Cultural Due Diligence Model. Managers and executives had developed these determinants in 1998 as a part of a consultation and stated that the determinants would guide their organizational health success. Managers and executives were given a list of 30 terms that are cited in management studies as determinants of manager/executive - organizational health success. From this list, they identified level determinants that impacted their success. These determinants were (1) an effective organizational structure, (2) clear and concise decision making, (3) effective management and understanding of people behavior in the organization, (4) safe and freeing organizational environments, and (5) clear satisfaction parameters as stated by employees and managers. The managers and executives stated that change would occur as successful implementation of these determinants became more present in the organization.

Through comparing emergent congruence themes of managers and executives, the instrument sought to identify the existence or non-existence of the model’s characteristics. Where there was alignment with the model, it was believed that the model accurately described key factors necessary to shape organizational behavior and organizational health.

As a Qualitative Instrument, the research was designed to analyze organizational and personal communications of 100 managers and executives in a corporate or government setting. Executives, as well as managers, were used because the researcher/developer of the instrument determined that a theme could only be identified if more than one level of the organization generated the same patterns. Generation of patterns at two levels would constitute a theme. The data analyzed using a Phenomenological Inquiry technique called a thematic analysis. The Instrument included a comparison of the emergent congruence factors from the thematic analysis with congruence characteristics in the Cultural Due Diligence Model developed by Emerge and Collaborative Consulting.

The instrument focused on the critical areas of alignment, based on the Cultural Due Diligence Model of congruence that could be revealed through a thematic analysis. The approach rationale suggested that adherence to the development of congruence in this research would be accomplished in the areas of decision making, people behavior, structure, environment and satisfaction parameters.
This was the area of description and analysis from the case. It was expected that the findings of this Instrument would support the Cultural Due Diligence Model as a method of developing and understanding congruence within organizations and among individuals.

The first step was the selection of the agency for the collection of data. Data were collected in three ways. The first data collection was the identification in 1999 of the managerial determinants of success. This was accomplished by providing the 100 managers and executives of the Instrument with 30 categories of organizational and managerial health success factors. The executives and managers identified the organizational success determinants that they valued as critical to their success in their organizations. This was a facilitated process of consensus. Managers and executives identified and agreed upon managerial success determinants that would guide their organizational performance. The second data collection was the identification of secondary source data from five years of correspondence to the principals of Emerge and Collaborative Consulting and to the other participants, focused team dialogues that occurred among the participants with the researcher present, team process reports and focused group discussion of the 100 managers and executives. This data source was used to assess the congruity of participant correspondence to the managerial success determinants identified in 1999. The third data collection was the synthesis of the researcher’s learnings from this Instrument as a participant and primary source of data. This collection did not occur until all the data had been presented. It was used to enrich the meaning of the Integrated Textural and Structural Descriptions.

The second step was the analysis of that data. Initially, the data sets were sorted into the five managerial success determinant categories of decision making, people behavior, environment, structure and satisfaction. The researcher listed in descriptive format the horizontal experiences of each of the 100 managers/executives.

The third step was the review of the data to determine the horizontal experiences of each participant by managerial determinant categories. To accomplish this, the researcher focused on statements or words that matched or aligned with the determinant categories.

The fourth step was reducing or eliminating extraneous material to develop the cluster frames from the horizontal experiences. The clusters were determined by the closeness of words and phrases in the writings that reveal key words from the Cultural Due Diligence Model. Each of the Cultural Due Diligence Key Word congruence characteristics represent declaratory statements or descriptors of definitions of the key words or phrases of the horizontal statements. The researcher then looked for
matches to the definitions or declaratory statements.

The *fifth step* was determining patterns in the words by participants where a frequency score represented a pattern within the Instrument. These patterns were determined for both executives and managers. To determine the pattern, the researcher counted the number of times clustered words were stated by the participants of the Instrument. Based on the total number of times, the frequency was identified. The researcher then described how many times the clustered word or phrase was stated by each participant to determined if a pattern had been established.

The *sixth step* was determining themes from the patterns of executives and managers. Themes only existed if the patterns occurred at both the manager level and the executive level.

The *seventh step* was matching the themes to the congruence characteristics of the Cultural Due Diligence Model and the themes to the managerial determinants of the Instrument.

The *eighth step* was identifying the textural descriptions and the structural descriptions of the participants by type – manager or executive. The textural descriptions help in understanding the context of the participants. These descriptions were based on existing data about each participant gathered at the interview process for developing the five managerial/executive determinants.

The *ninth step* was identifying the textural and structural composites of the participants by type – manager or executive. This step was critical to the research design as it established the “categorical description” of the managers and executives. If the method is to be used to describe organizational impacts, then composites of the participants would be essential.

This process set the stage for the development of *step ten*. In this step, an Integrated Textural and Structural Narrative was generated including the lessons learned by the researcher for synthesis. This step represented the primary source data of the researcher synthesis (called lessons learned) and was presented in both table and narrative format. *Step eleven* began the process of identifying the findings from all the data. Findings were identified in response to the six questions that are stated in the Data Analysis section of this chapter. Findings were also identified based on each table developed in the creation of patterns and themes. *Step twelve* represents the last chapter of the dissertation where the researcher states the conclusions and recommendations from the Instrument.

The Cultural Due Diligence Model used in this Instrument is a “dual process paradigm” that assesses the lived experiences of people and organizations through an analysis
of their responses and their behaviors. This assessment model was projected to enhance the sustainability of organizational decision making, structure development, people behavior, environmental design and satisfaction issues, the five determinants for employees and managers.

This Instrument was based on the following three facts:

1. Human Beings must experience alignment with their own values in order to achieve turning points in their personal and professional life. Numerous studies have investigated the impact of fear on the effective performance of organizational members. Other studies have suggested that a number of organizational leaders enjoy the restricted stance of employees when they fear punishment in organizational settings. Gibb in 1983, in the book Trust: A New View of Personal and Organizational Development, postulated that trust must govern personal and organizational action in order for growth and change to occur. This assumption is predicated on that writing. If alignment is possible, then movement is possible, if trust is increased and fear is reduced, then success in performance is possible.

2. Organizations must experience alignment with their expressed policies and procedures (the structural strategy dictating organizational and personal behavior) in order to achieve turning points in their managers’ and employees’ lives. Organizations have historically used policies and procedures as control functions within the organization to ensure compliance with organizational rules and strategies. Yet, organizations have continually touted that flexibility in these policies and procedures have allowed for respect of individuals and their unique needs. Should correspondence be aligned with thought, then employees should experience increased alignment in their own actions in the workplace.

3. Cultural Health is achieved when decision making, people behavior, structure, environment and satisfaction become verified facts and anchor points for individuals and organizations.

These facts suggested the following for this Instrument

1. Health characteristics from the Cultural Due Diligence Model must be present in all managerial success determinants to indicate success in the managers’ organizational performance and in the
organization’s health.

2. All managerial success determinants were equal in developing organizational success and organizational performance.

3. All characteristics of the Cultural Due Diligence Model must be present in the correspondence of managers and executives.

PROFILE OF PARTICIPANTS

There were 100 managers within this department and all with credentials in the field of Business Management, Business Accounting and Finance, and Computer Science. The research was designed around the communication of the 100 managers, inside and outside of their organizational unit, to determine if the County Administrative Officer’s perceptions were validated by the managers’ own perceptions and lived experiences of their organizational unit and their organizational relationships.

The 100 participants in this Instrument included 75 managers and 25 members of Executive Management Teams in organizations. Although these persons were identified as participants, the actual participation was in a secondary manner, as their participation was based on their written correspondence over a nine-year period while the firm principals were consultants. As there were two levels of employees, the analysis focused on the identification of issues present from each group (managers and executives) and how that identification informed the development of congruence characteristics in the data.

NATURE AND SOURCES OF DATA

The first data set for this Instrument was qualitative and consisted of interview responses from the 100 participants. The second data set for this Instrument consisted of (1) written organizational conversations, (2) written organizational reports, (3) e-mail conversations, (4) focused team dialogues, (5) team process reports and (6) focused group discussions, or combinations of these as revealed in the data. This data set was critical to the full assessment of the organizational themes. The data were generated from a single department where the communications were between the researcher and the participants or among the participants themselves.

There were three hundred forty (340) written organizational conversations over a nine-year period; thirty-seven (37) written organizational reports over a nine-year period; four
hundred seventy (470) e-mail conversations over a four-year period; twenty-four (24) focused team dialogues over a three-year period; twelve (12) team process reports over a three-year period; and fifteen (15) focused group discussions over a three-year period; for a total of 898 pieces of correspondence from 1991 to 1999. Although nine years of data were available, in some instances only a portion of those data were used, as required by the Van Kaam Method for theme identification.

These data sources are secondary sources as they were developed or conducted during consultations with the researcher in the role of consultant over a nine-year period. They were originally used as data for organizational consultation and for varying reports that the researcher developed for the organization in the role of consultant. They are now being used as secondary sources for this research Instrument. Denzin (p. 319) states

“that secondary sources are most legitimate when one has read or understood enough history to have some familiarity with a period...thereby allowing for a change from primary sources of data. He also states that the value in secondary sources is the frequency of the citation” (Ibid. p.318)

The third source of data was the synthesis of the researcher. The synthesis was accomplished by compiling the personal notes, personal observations, and participant conversations with the researcher to create a succinct and accurate listing of success determinant utilization. The synthesis represented the initial learnings of the researcher about the Instrument. From 1991 through 1999, personal notes of the researcher focused on the performance and interpersonal skill changes of managers and executives. They were used to guide the writing of reports about organizational change, organizational development, personnel selection and training development programs. They were used to develop the descriptions of the participants to better inform the correspondence analysis. All three data sets were qualitative and secondary in nature, as they were not originally developed for this Instrument.

DATA COLLECTION

As stated previously, the researcher in the consulting role guided the 100 manager-participants in their identification of the determinants of managerial/executive success as a part of the consultation process. Initially, a trip was made to collect the data not in the possession of the researcher as the first step. Ten days were spent on site reviewing computer data, reports, transcripts of focused group discussions and
focused team dialogues and team process reports. The data were copied with the permission of the County Administrative Officer. Where extra copies of reports existed, the reports were given to the researcher for use. Second, the data were sorted by category – by participant to ensure individuation of the participant-correspondence, and by participant-correspondence to the managerial success determinants of structure, decision making, environment, satisfaction and people behavior. This action allowed the researcher to categorize data in the five managerial success determinant categories for ease of analysis. The decision was made to use only the years where information was available from each participant to ensure that sufficient data existed to meet the requirements of the modified Van Kaam method. Third, spreadsheets were developed (See Figure, page 103) that listed the horizontal experiences of each participant by managerial success determinants. Fourth, the horizontal experiences were reviewed to eliminate all extraneous data that were superfluous to identifying key words from the horizontal experiences that reflected congruence characteristic definitions.

With these four steps completed, the process of clustering statements and key words began with step five. The purpose of the clustering was to determine patterns in the words or phrases of the participants. A series of charts were developed to identify clustered words from the Cultural Due Diligence Model for each participant to each managerial determinant category. This then allowed a numerical assessment of each characteristic by participant by managerial success determinant category. The sixth step required that both managers and executives identify the same characteristics in the same managerial success determinant categories in order for a theme to emerge. The identification of those sorts were then recorded in another chart entitled Theme Patterns. The seventh step was the identification of the emergent themes to congruence characteristics. This was based on the thematic relationships (where themes were identified if both levels of the organization matched) between the managerial success determinants and the cultural due diligence characteristics that matched both managers and executives. At this point, the themes would be identified.

Step eight returned to the knowledge base surrounding each participant or participant group from which textural and structural descriptions of the participants were developed from the interview data previously collected in the consultant role on each participant. The purpose of the descriptions was to provide a context for the horizontal statements made in step three of the data collection process. Step nine encompassed the development of composite
descriptions texturally and structurally to assess a macro context of managers and executives. Procedurally, this step allowed for the development of systemic perspectives of the participant groups. **Step ten** was the application of a process, entitled – *mining the data* – that focused on the development of synthesized narratives of the previous nine steps to summarize initial learnings of the researcher from the data collection process. The personal notes, observations and reports previously written were used to generate a profile of each participant that informed the direction or perspective of that participant to the comments in their correspondence.

With this completed, **step eleven** involved identifying the findings from all data collected. This was accomplished through the analysis of the data by the utilization of the six questions in the Van Kaam Method for data analysis. The **final step, (number twelve,)** involved developing conclusions and recommendations from the Instrument.

As previously stated, although nine years of data were available, the analysis included data sets, and the deductive process of analysis using the Van Kaam method of theme identification may encompass only one year, or one portion of a year, of accumulated data depending on the presence of emerging themes. If the identification of emerging themes allowed for a descriptive presentation of the managerial/executive success determinants with the Cultural Due Diligence Model characteristics and were revealed in one year or less; only the matching that occurred in that year was used in the Instrument. If, however, such themes did not emerge, the analysis of themes occurred for each successive year up to nine years.

**DATA ANALYSIS AND INTERPRETATION**

Patton (1990) stated that qualitative descriptive data should be presented in such a manner that anyone reading the data could both understand and draw their own conclusions from their lived experience with the data. This would mean that the written text and the analysis of that text would lend themselves to an interpretation of the text in question (Miles & Huberman, 1984). When coded (*in this case - mined data*), manageable units and sorting of the units into thematic categories would therefore be possible (Strauss and Corbin, 1990, Moustakas, 1994).

Using only numbers to represent the participants in the Instrument and to protect the anonymity of each participant, the actual written and verbal communications were analyzed using Moustakas’ modified Van Kaam method.
The Van Kaam Method for analyzing data is as follows (Moustakas, C, 1994, Phenomenological Research Methods, Sage Publications):

1. List all relevant experiences *(horizontalization)* and attach the relative importance of the experience in given sets.
2. Eliminate any information that is abstract, extraneous, vague or insufficient to understand or categorize *(reduction and elimination)*
3. Cluster the remaining information and identify themes *(thematizing)*
4. Develop a *textual* description
5. Create a *structural* description
6. Create a composite of the *textual and structural* descriptions to obtain and synthesize the essences of the experiences.

The data were analyzed in the following manner. *First*, the sorted information was presented in a spreadsheet table. The table identified the types of data versus the sources of the data. Examples can be “decisions made that impact organizational strategies; increased or decreased employee participation in legitimate decision roles, increase structure designs to match organizational work.” *Second*, a numeric check from the review of the data determined where existence of the patterns occurred or did not occur. Key words, key patterns, and potential themes were sought. There was no coding of the data in the traditional sense of coding. Rather, this Instrument focused on “mining the data” to identify the patterns. *Third*, upon completion, the themes identified were compared to the twelve points of the Cultural Due Diligence Model. *Fourth*, the data were presented according to the six points of the Cultural Due Diligence Model. *Fifth*, upon presentation of the data, tables were created to determine the themes of managers and executives with a calculation of the numerical presence of the themes in each of the success determinants for managers and executives. Upon identification, themes which correlated to the Cultural Due Diligence Model Characteristics were determined as the first step in the creation of a baseline for either modifying the model or establishing a pattern for assessing organizational congruence to manager/executive congruence in the areas of identified success determinants.

**DATA PRESENTATION**

The data were organized and recorded in narrative format
and then in table format, called horizontal experiences, demonstrating the experiences of the 100 managers in the managerial/executive success determinant areas. These horizontal experiences were sorted into themes and patterns in a separate table to show the alignment or misalignment of organizational themes to the Cultural Due Diligence Model characteristics and presented in Chapter Four as the data for analysis. Using the table format, it was believed that the data would reveal the frequency of each pattern and theme allowing for the identification of key themes that drove the organizational functioning and personal functioning of the managers.

Questions for exploration and use in describing the findings in the Instrument were:

1. What are the strong indicators of congruence that reveal themselves in the analysis of the stories, interviews and reports of the employees and managers?
2. Of the factors identified, which factors present are strongest in alignment with the cultural due diligence characteristics?
3. What verification is critical to identifying congruency in work and self?
4. Is there an inherent congruence in the organizational structure that complements and supports the emerging congruence in the employee?
5. What do people say about decision making, people behavior, organizational structure, organizational environment and satisfaction of employees and managers and how does that communication empower or disempower people to act and be culturally healthy?
6. How do the themes create change and transformation in an aligned manner?

As required by the Van Kaam Method, the horizontal experiences were presented in two formats, first as narratives and then in tables. In the tables, key words from the frequency spreadsheets were assigned to spreadsheets that identified key characteristics from the Cultural Due Diligence Model. The key words, by participants were then presented in another table that displayed the congruence characteristic phrases according to the managerial success determinants. There were a total of eight charts that identified the deductive steps in the Modified Van Kaam Method used to analyze the correspondence of the 100 participants and the relationships of emergent themes to the characteristics of the Cultural Due Diligence Model. These results were then presented in two summarized charts as patterns emerged from the correspondence of the managers.
and executives. These pattern charts were distilled to a theme chart that displayed the patterns movement to themes from the data. The next chart showed the themes relationship to congruence characteristics from the Cultural Due Diligence Model.

At this point in the presentation of the data, there was a return to a narrative assessment that described the textural and structural descriptions and composite descriptions of the participants by category. The final presentation of data was the synthesized data and learnings by the researcher.

**INSTRUMENT FINDINGS:**

Triangulation (*a method to enhance validity and reliability of qualitative research*) was used to develop the results of the instrument. Data was collected from multiple sources and in multiple methods (kinds of data, subjects [data sources] and data collection strategies) and was used to determine the current status of a population with respect to one or more variables. An analysis of the data sets revealed the following:

From each tape, ten non-overlapping triplets were selected (c-statement, t-statement, c-statement) starting after the first five minutes of each session with the instrument. A total of 1520 triplets were analyzed.

Table 1
Results concerning the directional hypothesis
The directional hypothesis can be directly tested with the help of DEL analyses. The DEL-coefficient of this analysis shows the quality of prediction of a certain hypothesis (an optimal prediction: all data observed correspond to the hypothesis). In this case, the DEL coefficient can be considered as a “measure of the directional effect). The higher the DEL coefficient, the stronger the directional effect of the processing characteristics/factors on the group’s mode of processing.

If one applies the analysis on this data, one gets a DEL result of 0.212 (p<.001). The hypothesis is confirmed. A further differential reflection of these effects with a Chi-square comparison allows further statements.

1. The majority of cultural health processing have deepening effects. A client or employee who is offered an explanation of their health will most probably accept this and at least for a moderate
period of time, move in the direction of change for a deepening effect on their organizational and personal performance.

2. Flattening processes predominantly cause flattening effects. This suggests that a client’s process can be impaired should the consultant focus on the negative effects of organizational performance.

3. The consultant’s directing effect is minimal for constant-leveling processes. The constant level process are critical to sustainable actions in health and seem to allow much greater freedom to realize constant level.

Consultants must therefore carefully consider their actions in processing outcomes in order to adequately adapt a client’s process understanding of their functioning within the organization and the organization’s ability to responsively hear or respond to the concerns raised by the client/employee.

When assessed a second time, using 800 triplets, the results were the following:

Table 2
Results of the second study
A DEL-analysis of these data yields a DEL of .417 (p<.001). According to these data, the directing effect is even more pronounced than in the first analysis of the data. The result suggests that the directing effect will be even stronger when the client’s level of intrapersonal exploration is higher.

We therefore conclude that the reliability and validity of the instrument and its findings in two separate utilizations are conclusive.

Respectfully submitted,
Lloyd C. Williams, D.Min., Ph.D.
Organizational Psychologist
Lloyd C. Williams & Associates
And
Chief Executive Officer
Institute for Transformative Thought and Learning

1 The description of phenomenological inquiry can be found in Moustakas Phenomenological Methods - Sage Publications

2 Lived experiences of people and organizations reflect the themes and patterns that reflect the conscious aspects of the person and the actions of that person. Often lived experiences explore issues of spirituality, faith, hope and awareness that inform people action and thought. In this Instrument, these concerns will only be addressed as they become reflected in patterns from the stories of employees and managers. Should they become patterns, there is no assurance that they will present themselves as themes for evaluation as nexus points.

4 Jack Gibb, in his book, Trust: A New View of Personal and Organizational Development, Seabury Press, 1983 focused entirely on the transformation issues of people and systems. His premise was that more things could occur in behavior, thought, and feelings when one operates from a stance of trust versus fear. He identified multiple stages for transformation and the impediments to that development.

5 There is a difficulty in the analysis of organizational valuing of employees. Numerous theorists from Gibb, Argyris, Cross, Williams et al have given rationales for the differing experiences of people. These experiences have emanated from manipulation, control, abuse, usury and other negative terms of expression to describe the issues of violence that often occurs when organizations operate from misalignment. The challenge in this assumption is the requirement that where alignment occurs within organizations, there is a direct impact on people behavior, decision making, environment, structure and satisfaction for employees and managers.
Appendix G
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May 11, 2005

Michael Martin
Penn State University
507 Keller Building
University Park, Pa 16802

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I hope this will serve your purpose, and best of luck with completing the Ph.D. program up there at Penn State.

Best,
Thomas Wells
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110 Conference Center Bldg.
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From 1986 to 1989, Michael worked for University of Massachusetts Cooperative Extension as an assistant and associate 4-H agent in Pittsfield, Massachusetts. In 1989, he moved to Montpelier, Vermont where he served as Extension instructor and subsequently Extension regional specialist overseeing the 4-H youth development program in three counties and the statewide 4-H residential camping program. In 1993, Michael relocated to Wilkes-Barre, Pennsylvania to accept the position of county Extension director and 4-H coordinator. In 1999, Michael transferred to the Penn State University Park campus to become special assistant to the vice president for Outreach and Cooperative Extension. Michael assumed his current role as associate director of development for 4-H in 2003 where he spearheads a comprehensive fundraising initiative for the Pennsylvania 4-H youth development program.

Michael has served on several state and national committees related to Cooperative Extension and 4-H. He has received numerous honors including the meritorious service award from the National Association of Extension 4-H Agents and mid-career award from Epsilon Sigma Phi.