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Organizational spiritual normativity as an influence on organizational culture and performance in Fortune 500 firms

By

Scott A. Quatro

A dissertation submitted to the graduate faculty

in partial fulfillment of the requirement for the degree of

DOCTOR OF PHILOSOPHY

Major: Education (Educational Leadership)

Program of Study Committee:
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has met the requirements of Iowa State University

Signature was redacted for privacy.

Major Professor

Signature was redacted for privacy.

For the Major Program

DEDICATION

This work is dedicated to my family, my *sine qua non*. To my beautiful wife Jamie, my thought partner and soul mate – thank you for being my "only one." To our four wonderful children, McKenna Lyn, Keaton Scott, Hallie Blair, and Hudson John – thank you for your trusting love and for making me feel like the most important man in the universe. With you all loving me I always remember that "its most important at home."

Soli Deo Gloria.

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ABSTRACT

The topic of spirituality in the workplace has exploded onto the contemporary business scene over the last 12 years. It is perhaps at once the most compelling and least understood force driving organizational theory and practice today. Previous studies have done little to codify what exactly spirituality in the workplace is, particularly as applied to aggregate organizational contexts. This is ostensibly due to the impossibility of defining a universally embraceable construct of organizational spirituality. Similarly, previous studies have made no attempt to investigate empirically the relationship between organizational spirituality and organizational performance. Theses two gaps in the current theory served as the catalyst for this study, and led to its two driving questions. First, can a universally applicable construct for codifying and measuring organizational spirituality be developed? And secondly, what relationship exists between this measure of organizational spirituality and organizational performance?

The study was conducted with the Fortune 500 as the organizational population. Just over 14% of the firms participated in the study. Data were gathered via a researcher-developed direct-mail survey of the top five senior executives in each of the Fortune 500 firms, and then analyzed to compute an Organizational Spirituality Score (OSS) for each respondent organization. This measure represents each firm's observed Organizational Spiritual Normativity, or the degree to which each firm's overall business activities, individual employee behaviors and beliefs, and commonly employed interventions, practices, and policies reflect congruence with widely-held spiritual norms or standards.

The relationship that exists between the Organizational Spirituality Score and long-term revenue growth and profitability was then investigated.

Results support the conclusion that congruence with the construct of Organizational Spiritual Normativity leads to stronger organizational performance. In short, those organizations that are more spiritually normative in their activities are also more profitable. Specifically, the study results showed that those organizations that demonstrate moderate to strong Organizational Spiritual Normativity achieved significantly higher long-term rates of net income growth and return on assets. The study findings did not support the conclusion of a similarly significant relationship existing between Organizational Spiritual Normativity and long-term revenue growth. Further investigation of the relationship between organizational spirituality and organizational performance is warranted, and specific recommendations are offered to this end for both practitioners and researchers.

Thus, this study contributes significantly to the dialogue concerning spirituality in the workplace in two primary ways. First, it presents a universally applicable theoretical construct for codifying and assessing organizational spirituality. Secondly, the study provides the first empirical evidence of a significant relationship between organizational spirituality and organizational performance.

CHAPTER 1 - INTRODUCTION

"We in the West live in a culture that separates man's spiritual life from his institutional life. This has had a far-reaching impact on modern Western organizations. It is also an integral part of the old mindset, or paradigm. Our companies freely lay claim to mind and muscle, but they are culturally discouraged from intruding upon our personal lives and deeper beliefs...the dilemma for modern organizations is that, like it or not, they play a very central role in the lives of many who work for them...splitting man into 'personal' or 'productive' beings makes somewhat artificial parts of what is the whole of his character. When we do so, our cultural heritage not only too strictly enforces this artificial dichotomization, but also deprives us of two rather important ingredients for building employee commitment. First, companies are denied access to higher-order values, which are among the best-known mechanisms for reconciling one's working life with one's inner life. Second, the firm itself is denied a meaning-making role in society, and thus pays excessive attention to instrumental values such as profit, market share, and technological innovation."

Richard Tanner Pascale

Stanford Graduate School of Business

Apparently Pascale's condemning words (1990, 80) concerning the traditional forced dichotomization between the "secular" and the "sacred" in the Western corporate world have struck a resonant chord. Over the last 12 years many prominent management and organizational theorists, including Senge (1990), Covey (1990), Block (1993), Bolman and Deal (1995), Spears (1995), de Geus (1997), Neal (1997), Vaill (1998), and Mitroff and Denton (1999) and have spent a great deal of time and energy struggling with this potentially volatile yet highly salient topic: What are the spiritual elements of

organizational life and work? How can organizations engage the "souls" of their employees? What can/should organizations do to foster spirituality among the ranks? What is considered "normative" from an organizational spirituality standpoint? And most important to this project, what connection does this all have, if any, to organizational performance?

Theoretical Foundations and Historical Context

While this may appear to be decidedly "new age" management fodder, in reality the theoretical foundations for considering the spiritual element of organizational life are deep indeed. Over 80 years ago Mary Parker Follett, now revered as a "prophet of management" for producing thinking and writing that was well ahead of her time, spoke of democratic governance as a "great spiritual force evolving itself from men, utilizing each, completing his incompleteness by weaving together all in the many-membered community life which is the true theophany" (1918, 137). With these words Follett boldly asserts that when human beings work together in organizations in such a way that their individual gifts, talents, and distinctives are woven together harmoniously, and each willingly submits to the others in the same organization, we are witness to a visible manifestation of "God" – an organization as "theophany". Writings in this same vein from Greenleaf (1970, 1988) and Maslow (1998) and are now canonized as management classics, each addressing the depth and meaning of human potential in organizational settings. Clearly, the thought-leaders of today's management landscape have some broad shoulders to stand upon as they address spirituality in the workplace.

Further fueling interest in the idea of organizational spirituality are both the climate of the American corporate arena over the last 15 years, and the demographic and sociological characteristics of today's workforce. Vaill (1998) has written about the "permanent whitewater" in which most organizations find themselves today as a result of increasing global competition and the rapid pace of technological change. He goes on to infer that, as a result of this tremendous instability and the related market dynamics, organizations as we know them will cease to exist as managers grapple with the necessary means by which (reengineering, virtual organizations, e-commerce, global acquisitions and/or alliances) their organizations remain competitive in the marketplace. The result of this organizational reality of constant change is a workforce that has felt increasingly "lost" in its search for meaning and balance in the workplace, with the stability and structure of pre 1980's corporate America a distant memory. Thus, as Vaill rightly predicted in 1990, "it seems likely, therefore, that we will not feel as organized as it might have been possible to feel a generation ago, although the process of letting go of that need and feeling will doubtless be a painful one" (1998, 174).

We appear to have reached a point in the evolution of organizational and management theory where we are simply being forced to face the question "what is the ultimate purpose of work and organizational life." Workers are no longer motivated or satisfied by the traditional view of work as simply a means to a material end. Lee and Zemke (1993), Neal (1997), and others have argued that such an assertion is supported by the demographics and values of today's workforce. With the baby boomers and the generation X-ers now making up the majority of the workforce, it's no wonder that these former flower children and independent-minded employees are searching for deeper

meaning in their work. In fact, numerous popular business press articles purport that

these employees are in fact *demanding* what Hackman and Oldham (1976) referred to as

"experienced meaningfulness of work," or they simply find another organization that will

provide them with such an environment. They represent a workforce in search of

aggregate self-actualization. One recent survey cited by *Business Week* and conducted by

the Gallup Organization indicated that 78% of Americans feel the need to experience

spiritual growth as part of their everyday lives, up from just 20% in 1994 (1999, 152).

This same survey also showed that 48% of Americans had spoken of their religious faith

in the workplace within the past 24 hours (1999, 153). Another important and recently

published qualitative study concludes that baby boomers in contemporary business

organizations are so desirous of spiritual holism that they are intentionally looking for,

and fostering, spirituality within and among their organizations despite the lack of

support from clergy and other "professional" spiritual moderators (Nash and McLennan,

2001).

Consistent with Vaill, Neal (1997) has posited that the abundance of

organizational downsizing that occurred between the mid 1980s and mid 1990s in

corporate America, combined with the arrival of the new millennium, has resulted in a

workforce that is spiritually hungry. The former because it has caused employees to

desire stability and meaning in their organizations, and spiritual values often serve as this

solid and constant "rock" of purpose, and the latter because the change of the century

gives us cause as employees, organizations, and even as a societal whole to reflect on

where we have been and imagine new possibilities for where we are headed. Thus, Neal

argues, there is an "overt openness to spirituality in the workplace at this unique point in

history" (1997, 121), and organizations are faced with the challenge of attracting, motivating and retaining an increasingly shrinking talent pool that is hungry for "wholeness" in their work lives. Further fueling this firestorm of interest in spirituality is the aftermath of the 9/11 tragedy, and the return of widespread organizational downsizing in conjunction with the U.S. economic slowdown of 2001. This is a reality that contemporary business organizations must accept in their quest to remain competitive into the 21st century.

Defining Spirit and Spirituality

The difficulty of addressing this reality of a workforce desiring wholeness and deeper meaning in their lives begins with the challenge of defining what spirituality means within the context of work and organizational life. The Latin origin/equivalent of the word spirit is "spirare," meaning "to breathe." Thus, at its core, spirit is what is alive in us when we are breathing and full of life. Without it, there is no life. Hawley (1993), Scott (1994), Kanungo and Mendoca (1994), and Mitroff and Denton (1999) have proposed definitions of spirit or soul within the context of work or organizational life that are consistent with the meaning of the original Latin; that is, that spirit or soul is the center or essence of a human being, out of which springs all creative, intellectual, and "life-giving" work. The implication here is that failing to address the spirit or the soul of an employee results in less than optimum performance because you fail to engage the very center and "life-giving" force of that employee. Agreement on this appears to be widespread among theorists in this arena.

However, as Neal points out, "spirituality is more difficult to define, and many of the people writing on spirituality in the workplace don't even attempt to try" (1997, 122). Perhaps this is because spirituality has more to do with the form and function of acknowledging the spirit; that is, the practice of living out a belief in the spirit. This clearly becomes more difficult because of the inherent connections to varying religious beliefs and practices, a subject that is decidedly more "sticky" in organizational settings than merely acknowledging the existence of a human spirit or soul. However, contemporary organizational and management theorists have overcome this objection by pointing out the very real differences between "religiosity" and "spirituality." The former refers to the dangers of an organizationally established religion; the latter refers to an organization's acknowledgement of the universal and ecumenical ideal of a higher purpose or power, and allowing and even intentionally fostering among the members of its workforce a direct connection to such a purpose or power. Of course this will inevitably lead to individual members of an organization bringing their religious practices and values into their work and work-life, but this is an entirely different prospect from proselytizing the workforce into one specified organizational religion. In fact many of today's management theorists would argue that such an outcome (i.e., employees connecting their personal religious beliefs and convictions with their work and organizational life) is exactly in line with the goals of a spiritually oriented organization as it strives to holistically engage it's workforce. It is important to note that the emerging work that has been done on spirituality in the workplace has followed in this vein, and is effectively quelling fears of organizational religiosity.

In one of the more recent contributions to the dialogue of spirituality in the workplace, Mitroff and Denton demonstrate that a definition of spirituality can be posited without fear of connections to any one religious perspective. Their thorough definition of spirituality involves the following elements (1999, 23):

- In contrast to conventional religion, spirituality is not formal, structured, or organized.

- Spirituality is not denominational.

- Spirituality is broadly inclusive; it embraces everyone.

- Spirituality is universal and timeless.

- Spirituality is the ultimate source and provider of meaning and purpose in our lives.

- Spirituality expresses the awe we feel in the presence of the transcendent.

- Spirituality is the sacredness of everything, including the ordinariness of daily life.

- Spirituality is the deep feeling of the interconnectedness of everything.

- Spirituality is integrally connected to inner peace and calm.

- Spirituality provides one with an inexhaustible source of faith and willpower.

- Spirituality and faith are inseparable.

More succinctly, Block comments that in its simplest form "spirituality is the process of living out a set of deeply held personal values, of honoring forces or a presence greater than ourselves. It expresses our desire to find meaning in, and to treat as an offering, what we do" (1993, 48). In short, Block argues that spirituality in the workplace begins with our willingness and ability to connect our higher-order values to the actual work we perform on a daily basis, and to the roles, relationships, and

responsibilities we hold, build, and accept as members of organizations. Thus,

addressing spirituality in the workplace requires that we investigate and make explicit the

inherently spiritual nature of work on a micro level, and of organizations on a macro

level. Such investigation is performed as part of our overarching quest to make

contemporary organizations and the work completed within them more fulfilling and

meaningful, thereby enhancing individual and organizational effectiveness.

Contemporary Theories and Models for Enhancing Individual and Organizational Effectiveness

Given an overview of the spiritual nature of organizations and work itself we can

turn our attention to an investigation of how spirituality enhances individual and

organizational effectiveness, and what approaches and models are more or less dictated

by a commitment to organizational spirituality. Here is where we attempt to move

beyond the theoretical to the practical, as we endeavor to implement the ideal of

spirituality in the workplace.

Indeed, in one of the most recent and empirical works completed in the arena of

spirituality in the workplace Mitroff and Denton have gone so far as to present "five

major and distinct models that constitute significant alternatives to the current policy of

strictly separating spirituality from the workplace" (1999, 8) that can serve as conceptual

and philosophical blueprints for organizations desiring to become more spiritually

sensitive, boldly ending the first chapter of their important work with the following

statement: "We refuse to accept that whole organizations cannot learn ways to foster soul

and spirituality in the workplace. We believe not only that they can but also that they

must" (1999, 14). Much of the recent literature on the idea of spirituality in the workplace has been in this vein, prefaced by similar claims of the imperative call for organizations to become more spiritually sensitive, and presenting largely philosophical ideals, models, and lists of "musts" for such aspiring organizations to embrace (see Kriger and Hanson, 1999, and Cash and Gray, 2000).

Despite these important recent contributions, there is a need to advance the dialogue concerning spirituality in the workplace in two significant ways. First, an actionable and broadly inclusive definition of organizational spirituality must be developed. Second, the quantifiable benefits of operationalizing organizational spirituality must be investigated.

Statement of the Problem

Much has been written about the "inherently spiritual" nature of organizational life but not to the extent that this inherent spirituality has been codified in operational terms, at least not in an integrated whole. Moreover, there has been no attempt to measure and quantify such a construct at an organizational level. Further, there has yet to be any published studies of statistically supported connections between organizational spirituality and organizational financial performance. Even the most empirical study completed to date (Mitroff and Denton, <u>A Spiritual Audit of Corporate America</u>) makes no attempt to connect organizational spirituality with organizational performance. These gaps served as the catalysts for this research project. It was expected that the project and any resulting papers/presentations would be a unique contribution to the existing

spirituality in the workplace literature/academy, regardless of the resulting affirmation or rejection of the ideal of organizational spirituality.

Significance of the Study

Despite the abundance of philosophical and conceptual arguments that have been posited over the last 12 years the issue as to whether organizational spirituality in particular is truly a source of competitive advantage is still in question. This is in large part the fault of the contemporary theorists that have yet to produce compelling research results to support or not support such an assertion. This is precisely why I was motivated to make this type of an empirical/quantitative study the topic of my dissertation research. While the theory introduced above is compelling, much work needs to be done to operationalize the theory and then empirically connect the theory to actual organizational performance. To this end, I have developed the theoretical construct of Organizational Spiritual Normativity (defined as "the degree to which an organization's overall business activities, individual employee behaviors and beliefs, and commonly employed interventions/practices/policies reflect congruence with widely-held spiritual norms or standards," and discussed in detail in Chapters 4 and 5 as a primary study finding) and related survey instrument (Apendix B), and have tested the hypothesis that strong Organizational Spiritual Normativity leads not only to more satisfied and motivated employees on an individual level (as has already been supported by the recent work of Mitroff and Denton), but, more specifically, to stronger economic performance at the corporate level as well. I strongly believe that this is the next frontier of research concerning spirituality in the workplace.

Some may argue that this study is, at its very core, inconsistent with the idea of spirituality due to the intention of connecting it to economic gain. I would argue that such investigation is necessary in order to for us to better understand the role of spirituality in the workplace, and set our expectations appropriately. I for one expect that the emerging research in this vein will only further strengthen the legitimacy of implementing, and even leveraging as a source of competitive advantage, organizational spirituality.

Research Questions

This study addressed the following research questions concerning the role of spirituality in the workplace and its impact on organizational culture and organizational performance.

1. What are the normative aspects of organizational spirituality (based upon a broadly inclusive view of spirituality)?

2. How reflective of Organizational Spiritual Normativity are the overall business activities, individual employee behaviors and beliefs, and commonly employed interventions/practices/policies of Fortune 500 firms? In short, which Fortune 500 firms are more spiritually normative?

3. Is there a difference in the long-term financial performance of those Fortune 500 firms that are stronger in terms of their organizational spiritual normativity and those firms that are less spiritually normative?

4. Is there a relationship between commonly employed interventions/practices/policies and organizational spiritual normativity?

Research Design

Primary Research

The primary research involved a direct-mail (cover letter included as Appendix A) survey of the top 4 or 5 senior managers (as indicated in public record) from the 500 largest (in terms of annual revenues), American-based corporations (as determined by Fortune Magazine; popularly referred to as the "Fortune 500"). Data from the survey were analyzed to determine an "Organizational Spirituality Score" (OSS) for each organization, as well as a "Spiritually-Related Interventions/Practices/Policies" Score (SIPPS) for each organization. For the purposes of the study the respondent senior executives were considered "key informants," and their responses were thus considered representative of their respective organizations as a whole. Targeting these individuals as being "representative" of their organizations is consistent with the key informant research methodology commonly employed in both quantitative and qualitative organizational and management research (see Judge and Dobbins, 1995, Jehn, 1997, Stevenson and Greenberg, 1998, Gerhart et. al., 2000, Gupta et. al., 2000, and Godard and Delaney, 2000, for representative implementation and/or critical discussion of key informant methodology in organizational contexts). Specifically, Kotter and Heskett's seminal study Corporate Culture and Performance (1992) is an excellent example of the employment of key informant methodology within the context of a quantitative study, and served as a significant source of influence for this research design.

Secondary Research

The secondary research involved computing Annualized Average Growth Rates in Total Revenues (TRG) and Net Income (NIG) for each of the subject organizations over a 10-year period (including fiscal years 1992 through 2000), as well as Average Return on Assets (ROA) for each of the subject organizations over a 3-year period (including fiscal years 1998 through 2000). Because all of the subject organizations file financial disclosures (such as an annual 10-K) with governmental agencies, the necessary financial data were readily available from various sources, including Standard and Poor's, Bloomberg Financial, and the Wall Street Journal.

Survey Instrumentation

The main research tool (developed based on my theoretical construct of Organizational Spiritual Normativity) is an employee survey instrument (Appendix B) that was mailed directly to each of the potential respondents. The survey consists of an opening section of 5 descriptive or demographic questions, a middle section of 20 questions designed to obtain the OSS data, and a final section of 15 questions designed to obtain the SIPPS data. The survey was designed to allow a participant to complete it in less than 15 minutes. The survey instrument is discussed in more detail in Chapter 3.

Assumptions of the Study

This study concerning the role of spirituality in the workplace and its impact on organizational culture and organizational performance is predicated upon the following assumptions.

1. Organizational spirituality is broader than has been heretofore presented in the literature, and involves more than individual employee expression of spirituality.

2. Organizational spirituality can be quantified.

3. The responses of key informants accurately reflect the state of their respective organizations' spiritual normativity.

4. Fortune 500 organizations are the largest, most complex, and most powerful business organizations in America. As such, the findings of this study have relative import for all business organizations, especially as these findings elucidate on-going efforts to leverage human resources as a sustainable source of competitive advantage.

Limitations of the Study

This study concerning the role of spirituality in the workplace and its impact on organizational culture and organizational performance was constrained by the following limitations.

1. The study was conducted without the benefit of a true experimental design.

2. The employment of the key informant methodology significantly reduces the level of granularity with which the respondent organization data can be analyzed, as well as the accuracy of that data (especially in regards to accurately reflecting the respondent's organizational spiritual normativity, and the related OSS). Early research design for this study involved gathering data from a stratified random sample of employees from approximately 20 matched pairs of competitive firms (i.e. General Motors and Honda, Pepsi and Coca Cola), thereby ensuring cross-functional and cross-hierarchical employee representation among the study participants. Given the

nature of the study and the difficulty of gaining widespread access to a reasonably large sample of Fortune 500 firms this approach was abandoned in favor of the key informant approach.

3. Annualized Average Growth Rate in Total Revenues (TRG), Annualized Average Growth Rate in Net Income (NIG), and Average Return on Assets (ROA) are only three out of a multitude of performance measures that can be employed to assess organizational performance.

4. The survey instrument employed in conjunction with the study was researcher developed, based largely upon the literature review and resultant re-conceptualization of spirituality in the workplace. As such, the survey has not yet been proven to be a valid measure of organizational spirituality. However, the internal reliability of the instrument was tested, as discussed in Chapters 4 and 5.

5. Given changes in ownership structure or firm historical differences, a full ten years of financial performance data related to the TRG and NIG measures was not always available for each of the respondent organizations. In those cases the financial performance computations for TRG and NIG were based on as much data as was available. However, this was necessary for only 4 of the 80 respondent organizations.

Definition of Key Terms

The following key terms must be highlighted and defined in conjunction with this study of spirituality in the workplace and its impact on organizational culture and organizational performance.

Net Income Growth (NIG) – Reflects the degree to which a firm's net income is growing from one performance period to another. NIG is commonly regarded as a strong indicator of organizational performance, particularly in relationship to overall firm profitability. For this study, NIG was calculated on a percentage basis from fiscal year x to fiscal year y, and then averaged for all years (1991 through 2000) to reflect an annualized average NIG rate for the firm in question.

Normative - Dealing with, or based on, widely-held norms or standards.

Organizational Spiritual Normativity - The degree to which an organization's overall business activities, individual employee behaviors and beliefs, and commonly employed interventions/practices/policies reflect congruence with widely-held spiritual norms or standards.

Return on Assets (ROA) - Reflects the degree to which a firm generates net income from currently held assets. ROA is commonly regarded as a strong indicator of organizational performance, particularly in relationship to overall firm profitability. For this study, ROA was calculated by dividing the firm's net income for year x by the firm's total current assets for year x, and then averaged for all years (1998 through 2000) to reflect an annualized average ROA rate for the firm in question.

Spirit - From the Latin "spirare," meaning "to breathe." Thus, at its core, spirit is what is alive in us when we are breathing and are full of life, and is inherently connected to "God" or a "Higher-Power." On the survey instrument spirit was therefore defined as a "life-giving force that exists at the center of every human being that is created by and/or connected to God, or a Higher Power."

Spirituality - Having to do with purposefully living out a belief in the spirit. On the survey instrument spirituality was thus defined as "intentionally living out a belief in the spirit so as to maximize the meaning, quality, and purpose of one's life *and* the lives of others."

Total Revenue Growth (TRG) - Reflects the degree to which a firm's revenue base is growing from one performance period to another. TRG is commonly regarded as a strong indicator of organizational performance, particularly in relationship to overall firm growth. For this study, TRG was calculated on a percentage basis from fiscal year x to fiscal year y, and then averaged for all years (1991 through 2000) to reflect an annualized average TRG rate for the firm in question.

CHAPTER 2 - REVIEW OF THE LITERATURE

Contributions From The Classics

"The new workplace is being forged on the themes of empowerment, involvement, flexibility, and self-management. And rather than naively believe that we are now reinventing management practice, it may be better to recognize the historical roots of many modern ideas and admit that we are still tying to perfect them."

John R. Schermerhorn

Ohio University College of Business

As the evolution of management and organizational theory continues into the 21st century the truthfulness of Schermerhorn's words (1999, 71) becomes obvious. It is academically insufficient to consider the contemporary state of the dialogue on spirituality in the workplace without first investigating, and giving credit to, the work of management thought-leaders of the past. To this end, a targeted analysis of the work of Mary Parker Follett, Abraham Maslow, and Robert Greenleaf is presented. These three individuals are being singled out as perhaps the greatest sources of historical management and organizational theory influence on the ideal of spirituality in the workplace.

Mary Parker Follett – "Prophet of Management"

A classically trained (Thayer Academy and Radcliffe College) philosopher and political scientist, Mary Parker Follett became interested in vocational guidance, adult education, and in the emerging discipline of social psychology in the beginning stages of her career. As early as 1918 Follett was writing about organizational philosophies and

theories that have now proven to be 50 to 75 years ahead of their time. Among the most important ideals proposed by Follett were organizational integration (the equivalent of empowerment and participative management), organizational interweaving and coordination (systems thinking), and purposeful leadership (servant leadership or visionary/transformational leadership).

Organizational Integration

In her work Creative Conflict (1924) Follett developed the notion of organizational integration as a means of ensuring that all parts of the organization were working together towards the same goals. Central to this idea was a recognition that the historically antagonistic relationship that existed between management and labor was at the core of most organizational ills. The model of being forced to chose a side, either pro-management or pro-labor, was antithetical to her notion of the organization as an integrated community. Follett even went so far as to denounce collective bargaining as a damaging practice that only resulted in management and labor staking out turf, fighting it out, and inevitable compromise on the part of one or both parties. The ultimate outcome was both management and labor losing sight of what Follett called the "functional whole" of the organization, for which they had joint responsibility. Rather than follow this traditional model of power and control, Follett championed the idea of "collective responsibility" where management would push responsibility, power, and goals down to the individual employee and work-group levels, commenting that "when you have made your employees feel that they are in some sense partners in the business, they...improve the quality of their work...because their interests are the same as yours (the managers)"

(1924, 82). The similarities between Folett's thinking here and the contemporary focus on empowerment and participative management are clear.

Organizational Interweaving and Coordination

Folett also took management thinking directly towards the contemporary theory of systems thinking with her thoughts on organizational interweaving and correlation. In The Evolution of Management Thought (long considered to be the authoritative work on the history of management theory up to the 1970s) Daniel A. Wren (1972) shares as illustration of this idea the "age-old conflict between the purchasing agent who desired to reduce the cost of purchased materials and the production manager who maintained that he needed better material with which to work." In this case each of the parties has an apparent total conflict with the other. However, Wren goes on, "if they followed the principal of early and continuous coordination, each could see the reciprocal problems and would turn their search toward finding or developing a material which met both of their requirements. Neither sacrificed his goals and unity was achieved for their particular departments, for the firm, and for the consumer or the community" (1972, 308). In short, Folett was a very early voice for the elimination of functional or departmental boundaries through the employment of cross-functional and/or cross-departmental work groups, the end result of which is the fostering of systems thinking (understanding the "interconnectedness" of organizational life and work) on both a micro (individual employee) and a macro (department or organization) level.

Purposeful Leadership

Lastly, Folett spoke directly to the contemporary model of a leader as servant and/or visionary, knowing that such a leadership style was necessary for any of her other management theories to work. Folett saw the leader as the shepherd of the organization's purpose (mission/vision), commenting that the leader should "make his co-workers see that it is not *his* purpose which is to be achieved, but a common purpose, born of the desires and the activities of the group. The best leader does not ask people to serve him, but the common end. The best leader has not followers, but men and women working with him" (Metcalf and Urwick. 1940, 262). Folett went so far as to approach using the specific language associated with servant leadership, commenting that leaders have "power-with" and not "power-over" their employees, further illustrating her point with the analogy that "you have rights *over* a slave, you have rights *with* a servant" (Metcalf and Urwick, 1940, 101). Her point here is clear: effective leadership requires an intentional humility and strength of mission/vision on the part of the leader that causes employees to become willing "servants", rather than conscripted "slaves", of the organization.

Connections Between Folett's Work and Spirituality

Clearly Folett's thinking appears to have been strongly influenced by her acknowledgement of the "higher purpose" of work and organizational life. The following quote captures this well: "We work for profit, for service, for our own development, for the love of creating something...professional men are eager enough for large incomes; but they have other motives as well, and they are often willing to sacrifice

a good slice of income for the sake of these other things...we all want the richness of life in the terms of our deepest desire" (Metcalf and Urwick, 1940, 145). Mary Parker Folett was truly decades ahead of her time, and only now is the piercing light of her thinking coming to play in the broad arena of organizational and management theory, and specifically in the context of spirituality in the workplace.

Abraham Maslow –Toward Theory Z

Abraham Maslow had significant influence on thinking surrounding human potential in organizational settings, perhaps more so any other management theorist prior to the 1980's. Often referred to as the Father of Humanistic Psychology, Maslow spent the majority of his career dealing with issues of human psychology in general societal contexts, with his most popular book Toward a Psychology of Being resulting in his idea of "self-actualization" becoming widespread knowledge. Later in his career Maslow turned his attention to business organizations as subjects for thought and research. This was a world that was entirely new for him, and his thinking and theorizing in this arena resulted in a series of essays originally published in 1961 as Eupsychian Management. This earlier work fell mostly on deaf ears as far as business practitioners are concerned, perhaps in part due to the eccentric title, but more likely due to the fact that American business executives were not ready to hear Dr. Maslow's calling. Only recently has the full insight of Maslow's thinking on work and organizational life come into focus with the "re-packaging" of his earlier work as Maslow on Management, in which we are presented with articulate and penetrating thinking on the application of self-actualization to organizational settings, enlightened management, and theory z.

<u>Self Actualization</u>

Perhaps Maslow's best known work surrounds his theory of human needs and

ultimate desire for self-actualization. Maslow canonized this theory in the Hierarchy of

Needs which presents a series of needs that all human beings desire to fulfill, beginning

with physiological (food, clothing), and ending with self-actualization (complete

intellectual, emotional, and "spiritual" fulfillment). Maslow makes a specific and

powerful connection to the ideal of self-actualization and organizational spirituality when

he comments on the universal human search for "salvation" (a term which Maslow

clearly uses interchangeably here with self-actualization) as being simply a "by-product

of self-actualizing work and self-actualizing duty" (1998, 9). Maslow goes on to infer

quite forcefully that such self-actualizing work must be meaningful and important in the

mind of the worker, and that providing such a work environment is the responsibility of

the organization and/or manager. Thus, Maslow was an early proponent of marrying job

design and motivational theory, a charge canonized by Herzberg's Motivation/Hygiene

Theory (Herzberg, Mausner, and Synderman, 1959), and Hackman and Oldham's Job

Characteristics Model (1975, 1976, 1980).

More important to this discussion, Maslow took the step of connecting this human

need for meaningful work to the spiritual nature of organizational life and work,

commenting that "self-actualizing work is simultaneously a seeking and fulfilling of the

self and also an achieving of the selflessness which is the ultimate expression of real self.

It resolves the dichotomy between selfish and unselfish. Also between inner and outer –

because the cause for which one works in self-actualizing work is introjected and

becomes part of the self so that the world and the self are no longer different" (1998, 9).

It is clear that Maslow's contention here is that self-actualization is dependent on human beings performing work that is connected to a "higher purpose" that is outside of, and much bigger than, any one individual person. Maslow's initial research on self-actualization supported this contention, with Maslow himself commenting that "this was the universal truth for all my self-actualizing subjects. They were metamotivated by metaneeds (B-values) expressed in their devotion to, dedication to, and identification with some great and important job. This was true of every case" (1998, 9).

Enlightened Management

Like Follett, Maslow realized that in order for self-actualization to occur in organizational settings a different management model than the traditional command and control paradigm would have to be advanced. Thus, Maslow presented his model of enlightened management. Such a management style is much like that proposed by Follett in her comments on purposeful leadership and organizational integration discussed above, and likewise is consistent with contemporary thinking on empowerment and participative management. In presenting his model Maslow appeals to the findings of the emerging research of his time that was beginning to show empirical support for the hypothesis that "superior managers" (i.e. those that produce higher productivity and/or stronger economic performance within their area of responsibility) are "more democratic, more compassionate, more friendly, more helpful, more loyal," requiring that "even the most tough-minded person in the world would have to draw the same conclusion as the most tender-minded in the world from these data, that a certain kind of democratic manager makes more profit for the firm as well as making everybody happier and

healthier" (1998, 103). Thus, Maslow presents a strong case for the necessity of embracing a management style that is focused on others as both a means to aggregate self-actualization, as well as to improved organizational performance, and that one does not occur without the other.

Theory Z

Although Maslow's writings about McGregor's theory x and theory y indicate a respect for both the man and the work he desired to take the idea a step further with theory z. Maslow hoped to break new ground in the arena of organizational and management theory with this idea, which unfortunately never came to pass due to his untimely death early in the genesis of this important work. The basic premise behind theory z was Maslow's belief that people were becoming increasingly "evolved" in their attitude towards work and organizational life, and as a result, were beginning to desire self-actualization in the workplace through the integration of higher order values and higher needs into their work-life. While this premise is strongly inferred in Maslow's earlier work on self-actualization and enlightened management (as discussed above), it was within the context of theory z that Maslow intended to make the implicit explicit. Despite the undeveloped state of Maslow's work on theory z we can now clearly see that this thinking was 30 years ahead of its time, specifically when we consider the growing interest in leveraging employees higher order values and meeting their higher order needs via increased spiritual sensitivity in the workplace.

<u>Connections Between Maslow's Work and Spirituality</u>

While the spiritual aspect of Maslow's work is clear and directly addressed in the above sections Maslow squarely addressed the macro-level influence of his thinking on work and organizational life in this vein. Exhorting his readers to take seriously his thoughts in this arena Maslow comments that his ideas such as enlightened management and self-actualizing work are ways of "taking religion seriously, profoundly, deeply, and earnestly. Of course, for those who define religion as going to a particular building on Sunday and hearing a particular kind of formula repeated, this is all irrelevant. But for those who define religion not necessarily in terms of the supernatural, or ceremonies, or rituals, but in terms of deep concern with the problems of human beings, with the problems of ethics, of the future of man, then this kind of philosophy, translated into the work life, turns out to be very much like the new style of management and of organization" (1998, 83). As Maslow rightly foresaw, the more deeply organizations look into the human element of work and organizational life, the closer they get to embracing spirituality in the workplace.

Robert Greenleaf – Toward Institutional Theology

Like Follett and Maslow, Robert Greenleaf was largely ignored by his contemporaries but today is regarded as the father of servant leadership, one of the most popular leadership theories in play in modern-day organizations, as well as a significant source of early influence regarding spirituality in the workplace. The impact of his thinking and life's work that spanned both a practitioner career (AT&T) and an

academic/consultant career (MIT, among others) springs mostly from his thoughts on servant leadership and institutional theology.

Servant Leadership

Greenleaf's seminal work The Servant as Leader was first published in 1970. In that work Greenleaf proposed his idea of a leader as a servant of his or her followers, rather than the traditional paradigm of the followers being servants of the leader, commenting that "the servant leader is servant first...It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to lead...The difference manifests itself in the care taken by the servant – first to make sure that other people's highest priority needs are being served. The best test, and the most difficult to administer, is: Do those served become healthier, wiser, freer, more autonomous, more likely to become servants? And, what is the effect on the least privileged in society; will they benefit or, at least, not be further deprived" (1970, 7)? The higher-order implications of Greenleaf's words are clear as he exhorts leaders to serve the "higher needs" of their followers and improve not only the work-life of those followers, but potentially society at large as well.

Institutional Theology

In order for servant leaders to develop and thrive in organizational contexts Greenleaf saw the concurrent need for a "theology of institutions" to be developed. Greenleaf argued that such a theology would provide accountability for leaders and trustees in organizations to ensure that they did in fact strive to improve society at large

rather than merely serve the selfish interests of the organization itself and of the individual owners and managers within it.

Connections Between Greenleaf's Work and Spirituality

Once again, as with Follett and Maslow, the connections between Greenleaf's work and spirituality are clear. The motivation behind his proposals to develop servant-hearted leaders and institutions whose theologies hold them accountable to higher-order values was his steadfast belief in the positive role that organizations could play in improving society in general. In his work Spirituality as Leadership Greenleaf addresses the issue head on, commenting that most societal caring was once done "person to person." However, Greenleaf goes on to say, "now much of it is mediated through institutions – often large, powerful, impersonal; not always competent; sometimes corrupt. If a better society is to be built, one more just and caring and providing opportunity for people to grow, the most effective and economical way, while supportive of the social order, is to raise the performance as servant of as many institutions as possible by new voluntary regenerative forces initiated within them by committed individuals, servants. Such servants may never predominate or even be numerous; but their influence may form a leaven that makes possible a reasonably civilized society" (1988, 1). Apparently enough servants have infiltrated organizations and served as "leaven" to motivate a ground-swell of interest in the higher order purposes of organizational life, a natural by-product of which is the contemporary focus on spirituality in the workplace.

Historical Context

We have reached a point in the evolution of organizational and management theory where we are simply being forced to face the ultimate question; that is, "what is the ultimate purpose of work and organizational life." With fairly widespread affluence among the developed nations of the world all but a given, workers are no longer motivated or satisfied by the traditional view of work as simply a means to a material end.

Workforce Demographics and Values

Lee and Zemke (1993), Neal (1997), and others have argued that such an assertion is supported by the demographics and values of today's workforce. With the baby boomers and the generation X-ers now making up the majority of the workforce it's no wonder that these former flower children and independent-minded employees are searching for deeper meaning in their work. In fact, some studies show that they are in fact *demanding* what Hackman and Oldham (1976) referred to as "experienced meaningfulness of work," or they simply find another organization that will provide them with such an environment. One recent study cited by *Business Week* and conducted by the Gallup Organization indicated that 78% of Americans feel the need to experience spiritual growth as part of their everyday lives, up from just 20% in 1994 (Conlin, 1999). This same study also showed that 48% of Americans had spoken of their religious faith in the workplace within the past 24 hours.

Organizational Downsizing and the New Millennium

Neal goes on to posit that the abundance of organizational downsizing that occurred between the mid 1980s and mid 1990s in corporate America, combined with the coming of the new millennium, have resulted in a workforce that is spiritually hungry. The former because it has caused employees to desire stability and meaning in their organizations, and spiritual values often serve as this solid and constant "rock" of purpose, and the latter because the change of the century gives us cause as employees, organizations, and even as a societal whole to reflect on where we have been and imagine new possibilities for where we are headed. Thus, Neal (1997) argues, there is an overt openness to spirituality in the workplace at this unique point in history.

Toward Contemporary Thinking

Neal's assertions appear to be well supported by the abundance of work conducted by organizational and management theorists on the topic of spirituality in the workplace over the last 12 years. Up to approximately 1990 such theory was relegated to a handful of voices "crying in the wilderness" (such as Follett, Maslow, Greenleaf) but since then we have seen spirituality in the workplace receive long-deserved attention and validity in both academic and popular literature, resulting in a number of models and theories coming onto the scene of organizational and management theory. The first step that many of these theorists have taken is to tackle the difficult question of defining exactly what it is we mean when we talk about spirituality in the context of work and organizational life, which is the launching point for the next major section of this review.

Contemporary Thinking On Spirituality In The Workplace

Defining Spirit and Spirituality

The Latin origin/equivalent of the word spirit is "spirare," meaning "to breathe." Thus, at its core, spirit is what is alive in us when we are breathing and are full of life. Without it, there is no life. Hawley (1993), Scott (1994), Kanungo and Mendoca (1994), and Mitroff and Denton (1999) have proposed definitions of spirit or soul within the context of work or organizational life that are consistent with the meaning of the original Latin; that is, that spirit or soul is the very center or essence of a human being, out of which springs all creative, intellectual, and "life-giving" work. The implication here is that failing to address the spirit or the soul of an employee results in less than optimum performance because you fail to engage the very center and "life-giving" force of that employee. Agreement on this appears to be widespread among theorists in this arena.

However, as Neal points out, "spirituality is more difficult to define, and many of the people writing on spirituality in the workplace don't even attempt to try" (1997, 122). Perhaps this is because spirituality has more to do with the form and function of acknowledging the spirit, that is, the practice of living out a belief in the spirit. This clearly becomes more difficult because of the inherent connections to varying religious beliefs and practices, a subject that is decidedly more "sticky" in organizational settings than merely acknowledging the existence of a human spirit or soul. However, in one of the more recent and empirically founded contributions to the arena of spirituality in the workplace Mitroff and Denton contend that such a definition can be posited without fear

of connections to any one religious perspective. Their thorough definition of spirituality involves the following elements (1999, 23):

- In contrast to conventional religion, spirituality is not formal, structured, or organized.

- Spirituality is not denominational.

- Spirituality is broadly inclusive; it embraces everyone.

- Spirituality is universal and timeless.

- Spirituality is the ultimate source and provider of meaning and purpose in our lives.

- Spirituality expresses the awe we feel in the presence of the transcendent.

- Spirituality is the sacredness of everything, including the ordinariness of everyday life.

- Spirituality is the deep feeling of the interconnectedness of everything.

- Spirituality is integrally connected to inner peace and calm.

- Spirituality provides one with and inexhaustible source of faith and willpower.

- Spirituality and faith are inseparable.

With this definition Mitroff and Denton touch on several aspects of spirituality specific to the inherent nature of work and organizations, as addressed by several other theorists.

The Inherent Spiritual Nature of Work

Many contemporary theorists, including Hardy (1990), Block (1993), Novak (1996), and Neal (2000), have commented on the inherent spirituality of work. Each has sounded an alarm for organizations and the managers within them to heed; that is, that human beings are wired to see their work as a "calling," a divinely mandated conduit

through which to exercise the unique talents and "gifts" endowed to them by a higher source/purpose to whom/which they are accountable. These talents and gifts are "hard-wired" into us at the core, or spirit/soul level, of our being. Thus, we are driven to employ them through our work in harmony with our higher order values/needs as a means of achieving both personal fulfillment (self-actualization), as well as the betterment of society at large. Novak addresses this directly when he comments that "half of the pleasure from the business calling comes from a sense that the system of which it is a part is highly beneficial to the human race, morally sound, and one of the great social achievements of all time. The other half is personal–finding purpose and meaning in what one does" (1996, 38).

The Inherent Spiritual Nature of Organizations

Given that the vast majority of work is done in organizational settings it holds to reason then that organizations themselves are also inherently spiritual. Senge (1990), Vaill (1998), Konz and Ryan (1999), and Porth et al. (1999) have all commented on this reality, as well as the "calling" for organizations to embrace this higher purpose. And once again, the theorists make the case for doing so in light of the impact organizations have on both individual employee lives, as well as on the societal structure in general. Vaill comments specifically that "spirituality is becoming an interesting and attractive source of meaning in today's organizations" (1998, 172).

As more and more organizations begin to align themselves with the contention that work and organizational life are inherently spiritual in nature the natural progression is for them to then seek for ways to acknowledge, or even actively promote, such a belief

through their organizational practices and philosophies. In short, organizations are becoming increasingly interested in fostering spirituality in the workplace. As a result, a number of contemporary thinkers have proposed models and theories to facilitate such efforts, which is where we now turn our attention.

Theories and Models for Enhancing Individual and Organizational Effectiveness

As stated above, a number of contemporary thinkers have written about spirituality in the workplace over the past 12 years, the majority of which has been focused more on presenting philosophical discussion and support for the ideal as opposed to presenting models/theories, and/or analyses of such models/theories, for implementing or operationalizing spirituality. Thus, it has been difficult to cull from the literature those works that are more prescriptive, and hence researchable, in their orientation.

Given that reality, the literature surrounding spirituality that can be reviewed in this light appears to primarily fall into three broad categories: namely, organizational culture and design; learning, creativity and organizational transformation; and leadership. Each of these categories, and a representative sample of the related literature, is addressed below.

Organizational Culture and Design

Cultural Values

Miller (1992), Ferguson (1993), Collins and Porras (1994), Millman et al. (1999), and many others have discussed the imperatives of having close-kit employee community and a higher purpose as central cultural values within organizations that aspire to long-

term economic survival. Given our earlier definitions of spirit and spirituality, it is clear

that establishing such cultural values is consistent with fostering workplace spirituality.

More explicitly, these theorists are arguing that fostering spirituality via close-knit

employee community and connections between business purpose and higher-order

purpose enables stronger organizational performance. They are contending that

employees want to have meaningful relationships with co-workers, meaningful work to

complete, and a feeling that "they can contribute to an organizational mission that makes

a difference in the lives of others" (Milliman et. al, 1999 ,225).

Millman et al. go further to identify employee empowerment, as championed by

many other theorists including Block (1991), Ray (1992), and Jaffee and Scott (1993),

and an emphasis on humor and enthusiasm as other necessary cultural values for

spiritually oriented organizations to articulate. The work of Millman et al. on the issue

of cultural values consistent with organizational spirituality is strengthened by the

application of their theory to a successful organization (Southwest Airlines). Such direct

application and/or analyses of models/theory regarding spirituality in the workplace is

unfortunately all too rare in the literature to date.

Arie de Geus (1997) has also written in this vein by articulating what he posits as

the four central cultural values, or "personality traits," of "living companies" that

emerged from a detailed historical study of the 30 oldest companies in the world. Such

companies have survived through the ages as a direct result of their shared commitment

to fiscal conservatism, marketplace awareness and sensitivity, strong group identity and

commitment, and tolerance of new ideas. The later two values are consistent with

organizational spirituality in that they imply a common commitment to the higher-

purpose of the organization, and a valuing of the ingenuity of the human intellect and spirit.

Models for Organization Design

In one of the most recent and empirically founded studies on spirituality in the workplace completed to date, Mitroff and Denton have taken the step of presenting five prescriptive models for designing spiritually oriented organizations (1999, 8-9).

1. The Religion-Based Organization (i.e. Servicemaster, Chik Fil A)

2. The Evolutionary Organization (i.e. Tom's of Maine, YMCA)

3. The Recovering Organization (i.e. Alcoholics Anonymous)

4. The Socially Responsible Organization (i.e. Ben & Jerry's, Patagonia)

5. The Values-Based Organization (i.e. Southwest Airlines, AES)

Mitroff and Denton then go on to lay out the broad, underlying principles of each organizational model, with the key being a commitment/accountability to a higher source/purpose. While I found these models to be interesting they lack impact due to the extremely limited application of the models to contemporary organizations, a fact which Mitroff and Denton openly acknowledge, commenting that "given the present state of our knowledge, it is vitally important to stress that we do not discuss operational specifics in this book" (1999, 12).

Given this reality, I actually found that the more robust findings associated with Mitroff and Denton's work are those surrounding the attitudes and beliefs of the individual business executives they surveyed and/or interviewed as part of their research. Statistical analyses of the responses given by the research participants (N=215) support

the following assertions (1999, xiv). Those organizations that identify more strongly with spirituality or that have a greater sense of spirituality have employees who:

1. Are less fearful of their organizations.

2. Are less likely to compromise their basic beliefs and values in the workplace.

3. Perceive their organizations as significantly more profitable.

4. Report that they can bring significantly more of their complete selves to work, specifically their creativity and intelligence.

The implications of these findings are significant in that they support the strategic value of fostering spirituality in the workplace, assuming that the attraction, development, and retention of human resources is a central concern of the organization. However, I find point #3 to be particularly weak, and a necessary subject for further quantitative research targeted at attempting to answer the question of whether spirituality *does indeed* translate into stronger financial performance. As previously mentioned, this was a major impetus for this study.

In addition to addressing the cultural values necessary to inculcate organizational spirituality (as previously discussed), Millman et al. (1999) present a larger "spiritual values-based model" that can be employed to design an organization that intentionally fosters spirituality. The four-tiered model, developed as an integration/enhancement of Anderson's (1997) values-based management model and Schuler and Jackson's (1987) strategic HRM framework, is as follows:

1. Articulation of organizational spiritual values

2. Delineation of business and employee plans and goals

3. Employment of HRM practices to reinforce plans/values.

4. Measurement of outcomes in terms of organizational performance and individual employee attitudes and spirituality.

While the model provides an integrated framework of methodology for the analysis and implementation of spirituality in organizations, it does not articulate specifics surrounding actual organizational spiritual values (i.e. what is spiritually normative). Further, no specific and/or universally applicable HRM practices are recommended. Third, while Millman et. al. call for the measurement of outcomes vis-à-vis spirituality they propose no framework or related instrumentation for doing so. Lastly, as of yet Southwest Airlines is the only organization to which the model has been theoretically applied.

Learning, Creativity, and Organizational Transformation

Individual and Organizational Learning

Beginning with Senge's seminal work (1990), research and writing about organizational learning has proliferated, including important contributions and analyses by Garvin (1993), Marquardt (1996), Easterby-Smith (1997), Gilley and Maycunich (2000), and many other theorists too numerous to mention here. Given the fast-moving nature of today's marketplace, the fierce level of competition on a global scale, and the growing scarcity of knowledge workers, these theorists argue that the focus on organizational learning as a strategic imperative is well warranted. More difficult than acknowledging the need for organizations to continuously learn is defining what "organizational learning" really means, what role individual learning plays in the equation, and what are the spiritual aspects of both.

Gilley and Maycunich define a learning organization as one "characterized by a culture, pervasive throughout the firm, dedicated to improving workers, their productivity, and overall business performance via continuous lifelong learning" (2000, 5). I find this definition particularly germane to the topic of spirituality in the workplace because it focuses on the micro, or individual employee level, of the organization, clearly inferring that organizational learning is, in effect, the aggregate of individual learning throughout the organization. Hence, the goal for the organization then is to create an environment within which individual employees can employ and further their gifts and talents in concert with their personal overarching higher-order values, as well as those of the organization as a whole (as discussed in the previous sections dealing with the inherent spirituality of work and organizations). The end result is higher employee motivation and satisfaction, and stronger organizational performance. In a similar vein, Beech et al. (2000) have presented a case study in which a spiritually influenced employee training program called "transfusion" was successful in generating an "evangelical experience" among the individual employees within the subject organization such that a "high impact" was achieved at the aggregate organizational level. These assertions by Gilley and Maycunich and Beech et al. are clearly in harmony with Senge's original notion of "personal mastery" as one of the five core disciplines of the learning organization.

Porth et al. (1999) take up the charge in this same vein, positing that the ideal of the learning organization is replete with spiritual themes, chief among them being employee development and continuous learning within the organization, information sharing and meaningful collaboration, and team building and shared purpose.

Connections to the spiritual values of community, honesty and openness, and self-actualizing work are clear here.

Organizational Transformation

Similarly, according to Neal et al.(1999) organizational transformation is rooted in spiritual influence, and often begins with transformation at the individual employee level. Once individual spiritual transformation is experienced, the employee beings to seek "spiritual integration," searching for new meaning in work, renewed commitment to performance within the organization, and deepening of relationships in the workplace. In the event that the employee is unable to find harmony between their renewed spiritual perspective and that of the organization they typically self-select out in search of a better organizational fit. Thus, the implication for organizational and management theory is clear in that remaining sensitive to individual spiritual transformation may indeed be one of the more powerful means to effect the retention of key performers, in addition to a significant source of leverage for gaining buy-in to aggregate organizational transformation.

Neal et al. go on to assert that the transformation process, at both the individual and the organizational level, is "non-linear" and "non-rational" (1999, 178). As support for their assertion they reference a qualitative study involving nearly a dozen specific examples of organizational transformation efforts guided by noted practitioners Senge, Bill Torbert, and Ellen Wingard. In discussing this research they comment specifically that "in each one, the practitioner/theorist uses their theory to diagnose and design the initial stages of a change process. Their theory provides a rational logic for pushing the

organization to the brink of transformation, and the theory offers logical tools to support the overall effort. Yet, in all cases the transformations they helped generate were sparked not through rational efforts at all: the actual 'cause' of transformation, according to the data, was expressed by these practitioners/theorists in terms of 'grace' (Ellen Wingard), 'magic' (Senge), and 'a miracle' (Bill Torbert)" (1999, 180). The inference is clear in that the cause of organizational transformation may actually be spiritual, rather than logical/rational, in nature. Marshak (1993), Jackson (1999), and Dehler and Welsh (1994) make similar assertions, the former arguing that we must redefine Lewin's classic change model in light of the influence of Eastern "confucionism", the second purporting that international business ethics is doomed to bureaucracy and organizational self-centeredness without a "spiritual infusion" to catalyze creative solutions and true moral guidance, and that last positing that the new management paradigm requires that organizational transformation efforts be approached from a holistic perspective.

<u>Leadership</u>

The contemporary literature is replete with individual works and edited collections of writings focused at least in part on forwarding the agenda of spiritually influenced leadership. Notable examples include contributions from Senge (1990), Covey (1990), Depree (1992), Boozer and Maddox (1992), Alderson and McDonnel (1994), Bolman and Deal (1995), Spears (1995), Bhindi and Duignan, (1997), Vaill (1998), Collins (2001), and Gilley et. al. (2001). While each of these works addresses the issue of spirituality in slightly different ways (some much more directly then others), the

theorists all agree on several fundamental principles of what can be called "spiritually normative" leadership:

- Leadership is fundamentally about serving others, and their higher-order values/needs

- Leaders know and clearly articulate their own higher-order values/needs

- Leaders provide a compelling vision and develop core values for the organizations and people they lead

- Leaders recognize the interconnectedness of all things, including organizational life

- Leaders hold themselves and those that they lead accountable

- Leaders are primarily focused on unleashing the human potential within their organizations

- Leaders openly address and deal with issues of both the heart and spirit within their organizations.

- Leaders intentionally build close-knit employee communities within their organizations.

Bolman and Deal capture the essence of this list nicely when they comment that "heart, hope, and faith, rooted in soul and spirit, are necessary for today's managers to become tomorrow's leaders...leading with soul requires giving gifts from the heart that breathe spirit and passion into your life and organization" (1995, 12). With these words Bolman and Deal exhort leaders in organizational contexts to selflessly give of the "gifts" that reside at the very center ("heart" or "soul") of their being, and thus bring us full-circle to our earlier discussion of the inherent spirituality of work and organizational life.

Toward a Definition of Organizational Spiritual Normativity

As previously discussed, I believe that the academy must advance the dialogue concerning spirituality in the workplace by codifying what organizational spirituality really is. To return to the words of Greenleaf, we must articulate how organizational and management theory has evolved to delineate a "theology of institutions" (with "theo" here being applicable to both "God" and/or a more universal concept of a "Higher Power/Purpose") consistent with a spiritually enlightened view of organizational life. To do so, we must first identify and articulate the common themes emerging from the spirituality in the workplace literature, as has been presented above. In addition, we must undertake a directed analysis of both the long established and the contemporary emerging spiritual faith traditions under-girding the spirituality at work movement, with an eye towards surfacing the common threads, or normative values and standards (as applied to organizational contexts), that weave among them.

In terms of investigating the long established faith traditions (aligned with the major organized religions), several works prove helpful, including those of Smith (1992) and Beckwith (2001). However, a recent and important work that most directly facilitates such an analysis is the edited collection entitled <u>Spiritual Goods: Faith Traditions and the Practice of Business</u> (Herman and Schaefer, 2001). Indeed, the contributors to the work were asked to draft their essays primarily as a means of answering the following query: "does your tradition nurture particular attitudes, practices, virtues relevant to the conduct of business" (Herman and Schaefer, 18)? The essays contained in this anthology cover 11 distinct faith traditions, both Western and Eastern in origin, and in its aggregate gives an excellent overview of spiritual normativity across

four of the five major world religions; namely, Buddhism, Christianity, Islam, and

Judaism (while Hinduism is not directly addressed in the book, Buddhism is closely

related). According to the editors, in doing so the contemporary interest in spirituality in

the workplace is placed squarely within the context of "its major source...those traditions

that stretch back hundreds, if not more than a thousand, or two thousand, years" (Herman

and Schaefer, 1). Thus, this work presents an excellent backdrop for understanding

organizational spirituality from the perspective of organized religion.

However, as previously discussed, in order to fully surface the normative aspects

of organizational spirituality the emerging contemporary faith traditions must be

investigated as well. Once again, several works prove helpful to this endeavor, including

that of Henegraaff (1998) and an edited anthology from Ferguson (1996). The former is

considered the authoritative and most comprehensive analysis of new age religion and

spirituality from the standpoint of historicity and theoretical underpinnings, and the latter

a decidedly unbiased assessment of the range of thought and practice within the

contemporary new age spirituality movement. Most helpful is a recent and important

contribution from Ken Wilber (2001), widely regarded as one of the thought leaders

within the new age spirituality movement. In his work A Theory of Everything: An

Integral Vision for Business, Politics, Science, and Spirituality Wilber presents a

sweeping overview of new age spirituality as it applies to the major forces of

contemporary society, including business and organizational life. Indeed, his stated goal

in writing the book is to encourage those that long for a "second-tier" transformation

regarding the integration of their spiritual and material lives, with new age spirituality as

the enabler (Wilber, 33). The work captures very well the spirit and normative values of

the non-organized religion camp within the spirituality at work movement, and thus was extremely helpful in my efforts to articulate the theoretical construct of Organizational Spiritual Normativity. This formulated construct is presented in Chapter 4 as the initial finding associated with this study, and the one upon which the other primary findings rest. It is then discussed in further detail in Chapter 5.

Concluding Thoughts

Spirituality and the Evolution of Organizational and Management Theory

It is interesting to note that, with an eye back to the beginning of the American industrial revolution of the 20th century, Maslow's hierarchy of needs (itself an inherently spiritual theoretical construct, as previously discussed) can be imposed as a metaphor upon the progression of organizational and management thought quite nicely.

Taylor, Weber, and Fayol established management as a true "science" by challenging firms to maximize productivity while minimizing costs, with the focus of most workers of that time clearly on satisfying the lower-order needs (physiological, safety). Mayo, Simon, McGregor, Maslow, Follett, and others then began to shift the focus from merely manipulating workers to understanding and motivating them, acknowledging the social and psychological dynamics of organizational life. This clearly corresponded with workers becoming increasingly desirous of satisfying the transitional/middle-order needs of social belonging and self esteem within a work context. And finally, contemporary theorists such as Senge, Block, Greenleaf, Mitroff and Denton, Neal, de Geus, Vaill, and others are exhorting us to build organizations that are proactive, values-based, holistic, and focused on leveraging and honoring human

resources as a true source of competitive advantage. In short, to build spiritually

normative organizations that effectively engage a workforce that is increasingly focused

on meeting the highest-order need of self-actualization.

CHAPTER 3 – METHODOLOGY

This chapter outlines the methodology employed in conjunction with this study of organizational spirituality and its impact on organizational culture and organizational performance. The study primarily employed a non-experimental, quantitative design. All statistical analysis was conducted using SPSS for Windows, Version 10.1.3.

Research Questions

The overall study methodology was designed to address the following major research questions.

1. What are the normative aspects of organizational spirituality (based upon a broadly inclusive view of spirituality)?

2. How reflective of Organizational Spiritual Normativity are the overall business activities, individual employee behaviors and beliefs, and commonly employed interventions/practices/policies of Fortune 500 firms? In short, which Fortune 500 firms are more spiritually normative?

3. Is there a difference in the long-term financial performance of those Fortune 500 firms that are stronger in terms of their Organizational Spiritual Normativity and those firms that are less spiritually normative?

4. Is there a relationship between commonly employed interventions/practices/policies and Organizational Spiritual Normativity?

Methods Employed to Address the Research Questions

Research Question One – Definition of Widely-Held Organizational Spiritual Norms

The literature review provided the basis upon which to answer this question. As previously discussed, the theoretical construct of Organizational Spiritual Normativity represents a significant re-conceptualization of spirituality in the workplace. Thus, the qualitative inquiry of this theory was considered the initial research question for the study. Further discussion surrounding the findings associated with this research question follows in Chapter 4.

Research Question Two – Measuring Organizational Spiritual Normativity

To measure the Organizational Spiritual Normativity of potential respondent organizations a survey tool was developed and administered to gather data surrounding organizational congruence with widely-held spiritual norms.

Organization/Human Subjects

As previously discussed, the research involved the potential participation of human subjects from 500 different subject organizations. The intended subject organizations were chosen based on their inclusion in Fortune Magazine's annual ranking of the 500 largest, publicly-held, American-based corporations for the year 2001 (popularly referred to as the "Fortune 500"). The human subjects were chosen based on public records indicating that they were one of the top 4 or 5 senior-level executives in each company. These individuals were identified via a variety of publicly available sources, including SEC filings and company annual reports. A total of 2,272 surveys

were mailed directly to these individuals on August 8, 2001 (cover letter included as Appendix A).

Survey Instrument

The main research tool is a researcher-developed employee survey instrument (Appendix B) that was mailed directly to each of the potential respondents. The survey consists of an opening section of 5 descriptive or demographic questions, a middle section of 20 questions designed to obtain the Organizational Spirituality Score (OSS) data, and a final section of 15 questions designed to obtain the Spirtually-Related Interventions/Practices/Policies (SIPPS) data. The survey was designed to allow for a participant to complete it in less than 15 minutes.

Each of the 20 questions in the middle section of the survey have response options worth from 1 to 5 points, based on the provided Likert-type scales. Thus, the highest possible OSS that a firm may receive from a respondent is 100 (20*5), and the lowest OSS that a firm may receive is 20 (20*1). As previously discussed, the OSS computed from the individual key informant was then considered an accurate representation of that particular organization's spiritual normativity. Additionally, all of the individual responses provided to the 20 questions in the middle section of the survey were analyzed to measure the internal reliability/consistency of the survey instrument. Cronbach's Alpha was employed for this test, and the results are discussed in Chapter 4.

The 15 questions in the 3rd and final section of the survey have response options of either "yes" or "no," with a "yes" (indicated by the respondent checking a box next to the Spiritually-Related Intervention/Practice/Policy in question) being worth 1 point and

a "no" (indicated by the absence of a check in the same box) being worth 0 points. Thus, the highest SIPPS that a firm may receive is 15 (15*1), and the lowest SIPPS that a firm may receive is 0 (15*0). The respondents were also asked to provide their personal rating of each intervention/practice/policy and its respective impact on organizational spirituality. This data will likely be analyzed within the context of a subsequent study, as discussed in further detail in Chapter 5.

Detailed results regarding the organization/human subjects, including survey response rates (both individual and organizational), respondent demographics (both individual and organizational), and descriptive statistics for both the OSS and SIPPS measures follow in Chapter 4. In appreciation for their participation the individual respondents were sent an executive summary of the study findings (cover letter attached as Appendix C).

Research Question Three – Analyzing the Statistical Relationship Between Organizational Spiritual Normativity and Organizational Performance

As previously discussed, a driving force for this study was to test empirically the relationship between organizational spirituality and organizational performance among Fortune 500 firms. The selected organizational performance measures included Annualized Average Growth Rate in Total Revenues (TRG), Annualized Average Growth Rate in Net Income (NIG), and Average Return on Assets (ROA). The procedure involved computing TRG and NIG rates for each of the respondent subject organizations over a 10-year period (including fiscal years 1991 through 2000), and ROA rates over a 3-year period (including fiscal years 1998 through 2000). Because all of the

subject organizations file financial disclosures (such as an annual 10-K) with governmental agencies, the necessary financial data were readily available from various sources, including Standard and Poor's, Bloomberg Financial, and the Wall Street Journal. When a full ten-year compliment of TRG and NIG related data were not available for a respondent organization the same computations were conducted using as much data as was available (this was necessary for only 4 of the 80 respondent organizations). These computed organizational performance measures were than analyzed to address the following research hypotheses. Detailed discussion of the results of each test, including descriptive and inferential statistics, follows in Chapter 4.

Hypothesis 3a

There is no significant relationship between the organizational performance measure of Annualized Average Growth in Total Revenues (TRG) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS).

Correlation analysis and One Way ANOVA were employed to test this research hypothesis. For the One Way ANOVA analysis, the respondent organizations were assigned to three groups (High OSS, Medium OSS, and Low OSS) based on their computed OSS and the observed mean and standard deviation for the OSS measure. Thus, OSS served as the independent variable, and the computed TRG served as the dependent variable.

Hypothesis 3b

There is no significant relationship between the organizational performance measure of Annualized Average Growth in Net Income (NIG) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS).

Correlation analysis and One Way ANOVA were employed to test this research hypothesis. For the One Way ANOVA analysis, the respondent organizations were assigned to three groups (High OSS, Medium OSS, and Low OSS) based on their computed OSS and the observed mean and standard deviation for the OSS measure. Thus, OSS served as the independent variable, and the computed NIG served as the dependent variable.

Hypothesis 3c

There is no significant relationship between the organizational performance measure of Average Return on Assets (ROA) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS).

Correlation analysis and One Way ANOVA were employed to test this research hypothesis. For the One Way ANOVA analysis, the respondent organizations were assigned to three groups (High OSS, Medium OSS, and Low OSS) based on their computed OSS and the observed mean and standard deviation for the OSS measure. Thus, OSS served as the independent variable, and the computed ROA served as the dependent variable.

Research Question Four – Analyzing the Statistical Relationship Between Commonly Employed Interventions/Practices/Policies and Organizational Spiritual Normativity

Lastly, the relationship between Organizational Spiritual Normativity and a number of commonly employed interventions/practices/policies was investigated. It was expected that this analysis would test the soundness of the re-conceptualization of spirituality in the workplace as the broader Organizational Spiritual Normativity theoretical construct, as well as the related content validity of the survey instrument. The 15 specific interventions/practices/policies included in the 3rd section of the survey instrument (designed to allow for the computation of an organization's Spiritually-Related Intervention/Practice/Policy Score, or SIPPS, as discussed above) were as follows:

1. Training with spiritual content
2. Spiritually influenced vision/mission statements
3. Paid time-off for religious/community service activities
4. Work-group or departmental retreats
5. Self-managed work teams
6. 360-degree performance evaluation
7. "Open" physical work environment
8. Company-wide meetings/celebrations
9. Team-based performance evaluation
10. Compensation ratios (for highest to lowest paid employees)
11. Corporate sponsorship of charities/causes
12. Employee wellness program
13. Mentor program
14. Flexible work hours
15. Company counselor/chaplain/spiritual moderator

These specific interventions/practices/policies were chosen based on the literature review and the related surfacing of widely-held spiritual norms and standards (as applied to

organizational contexts). These computed SIPPS were than analyzed to address the following research hypothesis. Detailed discussion of the results of the test, including descriptive and inferential statistics, follows in Chapter 4.

Hypothesis 4

There is no significant relationship between the Organizational Spiritual Normativity measure of Spiritually-Related Interventions/Practices/Policies (SIPPS) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS).

Correlation analysis and One Way ANOVA were employed to test this research hypothesis. For the One Way ANOVA analysis, the respondent organizations were assigned to three groups (High SIPPS, Medium SIPPS, and Low SIPPS) based on their computed SIPPS and the observed mean and standard deviation for the SIPPS measure. Thus, SIPPS served as the independent variable, and the computed OSS served as the dependent variable.

CHAPTER 4 – RESEARCH RESULTS

The primary purpose of this study was to investigate the relationship between organizational spirituality and organizational performance. The methods employed to conduct this investigation are outlined in Chapter 3. This chapter presents the results associated with the study, organized around the 4 primary research questions.

Results Obtained in Relationship with the Research Questions

Results for Research Question One – Definition of Widely-Held Organizational Spiritual Norms

The literature review served as the means by which widely-held spiritual norms were surfaced and synthesized into an integrated theoretical construct applicable to organizational contexts. As previously discussed, such a construct has yet to be presented in the spirituality at work literature, and served as the starting point for addressing the remaining three research questions.

Based on this close review and analysis of the literature (as presented in Chapter 2), the most widely-held spiritual norms (as applied to organizational settings) are as follows:

Shared and Intentional Mission/Vision/Values – the formal articulation and integration of mission, vision, and values into every aspect of the organizational system is of the utmost importance, essentially serving to outline the "orthodoxy" of the organization.

Individual and Group Transparency – open, honest, and non-defensive communication is valued and expected at all levels of the organization, and is not limited to work matters.

Equity and Justice – fairness, particularly surrounding performance management, compensation, and employee discipline, is of critical importance.

Personal Consciousness and Accountability – awareness of individual and aggregate group/corporate behavior and related consequences (both positive and negative) is continually reinforced throughout the organization.

Ethical Clarity and Soundness – the ethical code of the organization is unequivocally clear, and consistent with natural and moral law (i.e. the "golden rule").

Task Significance – the organization constantly reinforces the "higher-order" purpose of the organization, and the individual and corporate tasks completed therein.

Individual/Organizational/Societal Interconnectedness – the belief that organizational life is not a "zero-sum" game is widely propagated throughout the organization, reinforcing the symbiotic nature of open organizational systems.

Inclusiveness – the organization intentionally embraces and leverages people from all walks of life, without unnecessary regard for individual personal differences surrounding race, national origin, gender, age, or spirituality/religion.

Servanthood – the ideal of leadership as servantship is widely embraced and embodied by the senior management of the organization.

Sacredness of Organizational Life – the mindset that all organizational activity is inherently "sacred" as opposed to mundanely "secular" is widely shared throughout the organization.

Active Individual and Organizational Spiritual Practice/Expression – the organization fosters individual, group, and even corporate practice and expression of spirituality in the regular course of daily organizational life.

Thus, according to this proposed theoretical construct, the degree to which an organization's overall business activities, individual employee behaviors and beliefs, and commonly employed interventions/practices/policies reflect congruence with these widely-held spiritual norms or standards is a measure of that firm's Organizational Spiritual Normativity. The survey instrument employed to address research question two was built around these same organizational spiritual norms.**Results for Research Question Two – Measuring Organizational Spiritual Normativity**

The results obtained regarding research question two, including survey response rates (both individual and organizational), respondent demographics (both individual and organizational), and descriptive statistics for both the OSS and SIPPS measures follow.

Response Rates

The statistical analysis was performed with a total sample size of 80 cases obtained via the direct mail survey. A total of 2,272 surveys were mailed to potential respondents, of which 167 were returned as "undeliverable" for a variety of reasons. Thus, the effective response rate on an individual human subject basis was 3.8%, or 80/(2272-167). Of these 80 cases, 9 represented second cases from the same firm. Thus, the effective response rate on an organizational subject basis was 14.2%, or 71/500. The minimum sample size required to maintain power of 0.80 with alpha set at 0.05 and the effect size of interest set at 0.14 (R-squared convention for a significant relationship) using 3 groups for One Way ANOVA is 66.

Individual and Organizational Respondent Demographics

The first section of the survey instrument was designed to obtain a variety of general demographic information about the individual respondents. This demographic profile is found in Table 4.1.

Table 4.1 – Demographic Profile of Individual Respondents

Demographic Categories	N	Percentages
Gender		
Female	7	9%
Male	73	91%
Years of Experience in Current Industry		
0 to 5	6	7.5%
5 to 10	6	7.5%
10 to 20	16	20%
More than 20	52	65%
Years Employed by Current Organization		
0 to 5	14	17.5%
5 to 10	15	19%
10 to 20	21	26%
More than 20	30	37.5%
Functional Area		
Production/Operations Management	6	7.5%
Sales and Marketing	6	7.5%
Finance and Accounting	19	24%
Human Resource Management	6	8%
Information Systems	4	5%
General Management	31	39%
Legal Counsel	7	9%
Research and Development	1	1%
"I am a spiritual person"		
Mean Response	4.325	

Additionally, each of the surveys was coded with a unique identifier to enable the researcher to track organizational demographic information. This organizational respondent demographic profile is found in Table 4.2.

Table 4.2 – Demographic Profile of Organizational Respondents

Demographic Categories	N	Percentages
Industry Classification		
Services	31	44%
Manufacturing	40	56%
Company Size		
Fortune 1 to 100	13	18%
Fortune 101 to 200	9	13%
Fortune 201 to 300	14	20%
Fortune 301 to 400	20	28%
Fortune 401 to 500	15	21%

A complete listing of the firms that participated in the study is included as Appendix D. To guarantee the confidentiality of the respondent organizations none of the study variables or findings are connected directly to any of the individual organizations.

Organizational Spirituality Score (OSS) Descriptive Statistics

The second section of the survey instrument was designed to obtain the necessary data to calculate an Organizational Spirituality Score (OSS) based on each individual respondent's answers. The results indicate a mean OSS of 65.6 (lowest possible score = 20, highest possible score = 100), with a standard deviation of 12.04. Figure 4.1 provides a histogram of the observed OSS results.

Figure 4.1 – Histogram of Observed Organizational Spirituality Score (OSS) Results
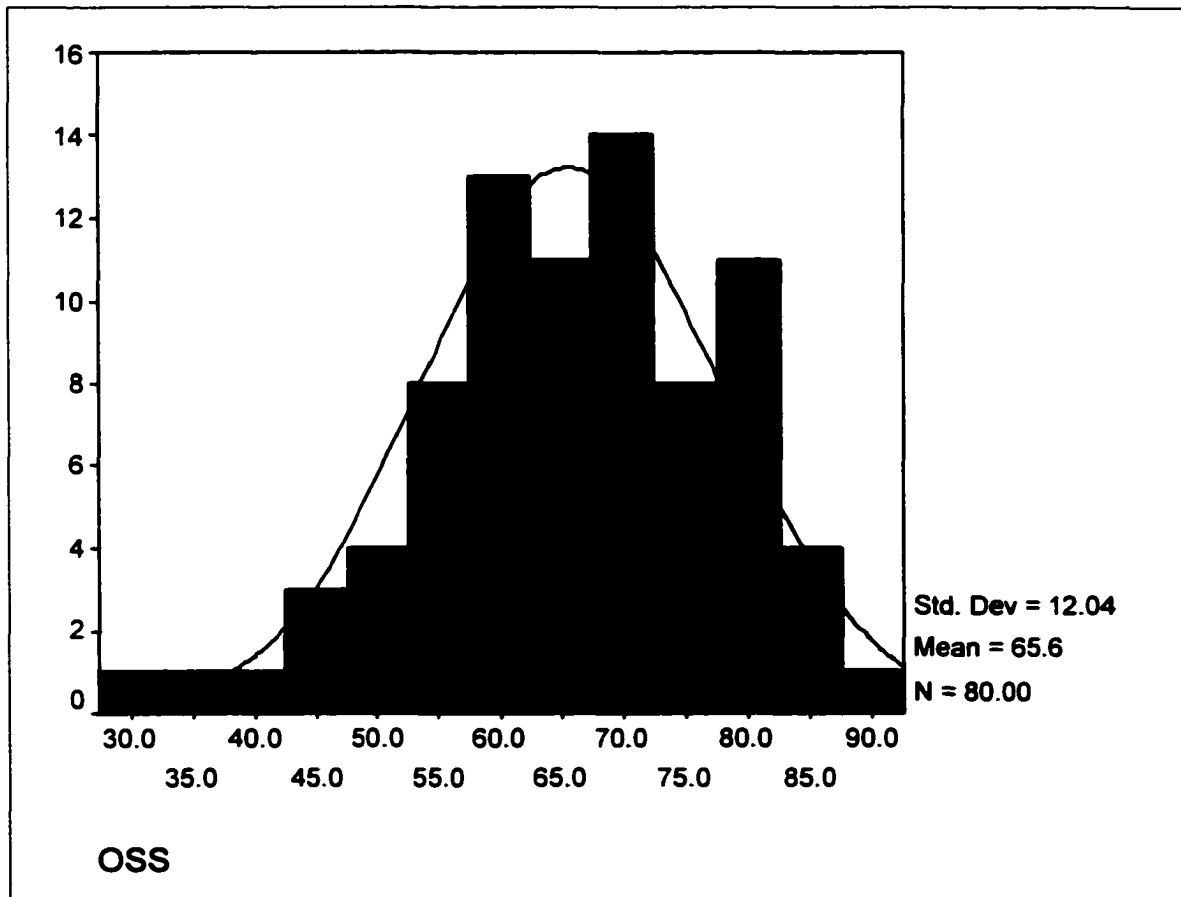
Additionally, all of the individual responses provided to the 20 questions in the middle section of the survey were analyzed to measure the internal reliability/consistency of the survey instrument. Cronbach's Alpha was employed for this test. The results obtained in this test are Alpha = 0.8821, indicating that the survey instrument is indeed internally reliable/consistent and thus measures Organizational Spiritual Normativity in a useful way.

Spiritually-Related Interventions/Practices/Policies Score (SIPPS) Descriptive Statistics

The third section of the survey instrument was designed to obtain the necessary

data to calculate a Spiritually-Related Interventions/Practices/Policies Score (SIPPS)

based on each individual respondent's answers. The results indicate a mean SIPPS of 7.9

(lowest possible score =0, highest possible score = 15), with a standard deviation of 2.43.

Figure 4.2 provides a histogram of the observed OSS results.

Figure 4.2 – Histogram of Observed Spiritually-Related Interventions/Practices/Policies Score (SIPPS) Results
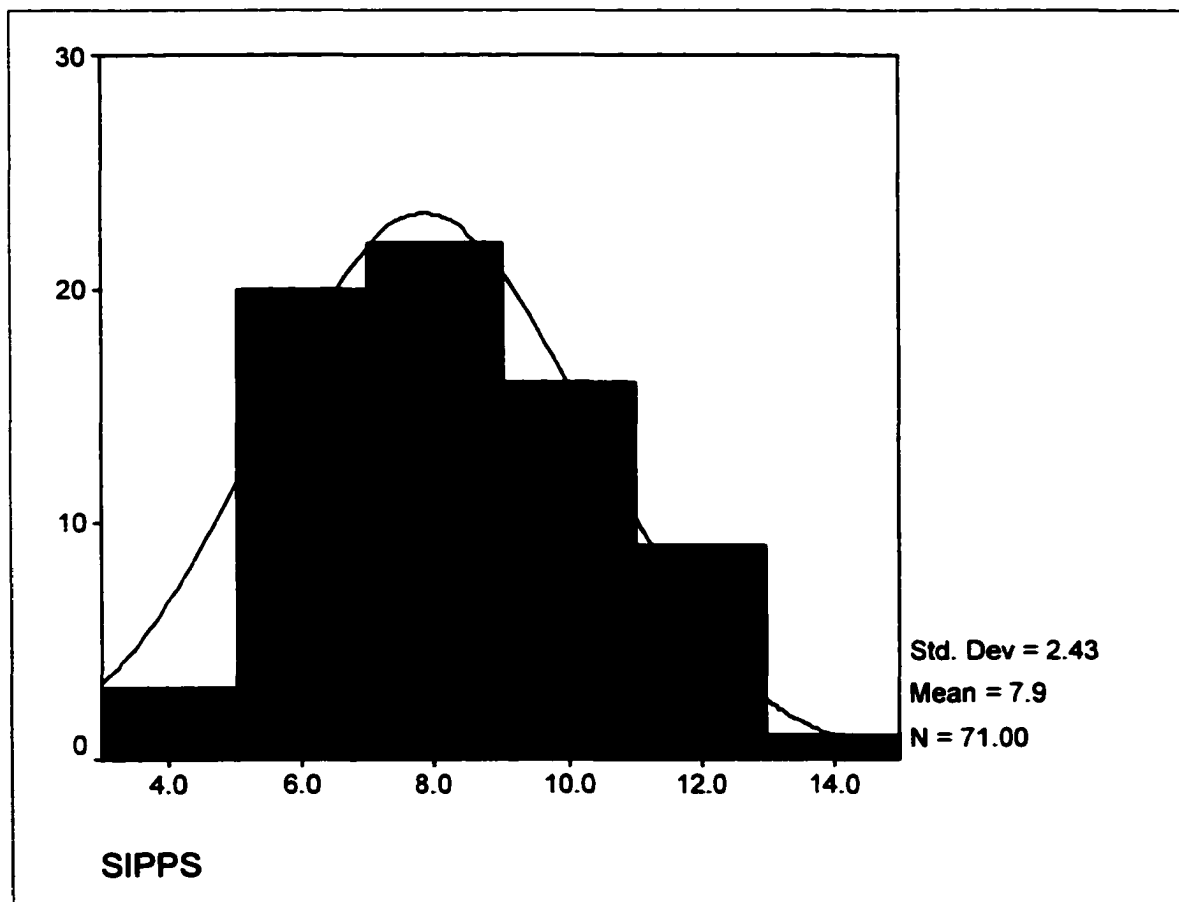
Std. Dev = 2.43
Mean = 7.9
N = 71.00

Results for Research Question Three – Analyzing the Statistical Relationship

Between Organizational Spiritual Normativity and Organizational Performance

The results obtained regarding research question three, including descriptive

statistics for the TRG, NIG, and ROA measures, as well as inferential statistics

concerning the relationship between these variables and the OSS measure, are detailed

below. A complete copy of the study data set employed to derive inferential statistics

(excluding individual OSS question responses) is attached as Appendix E.

Annualized Average Total Revenue Growth (TRG) Results

TRG Descriptive Statistics

The secondary research involved computing performance measures for each of

the respondent organizations, including TRG. The results indicate a mean TRG of 0.23,

with a standard deviation of 0.38. Figure 4.3 provides a histogram of the TRG measure.

Figure 4.3 – Histogram of Computed Annualized Average Total Revenue Growth (TRG) Measure
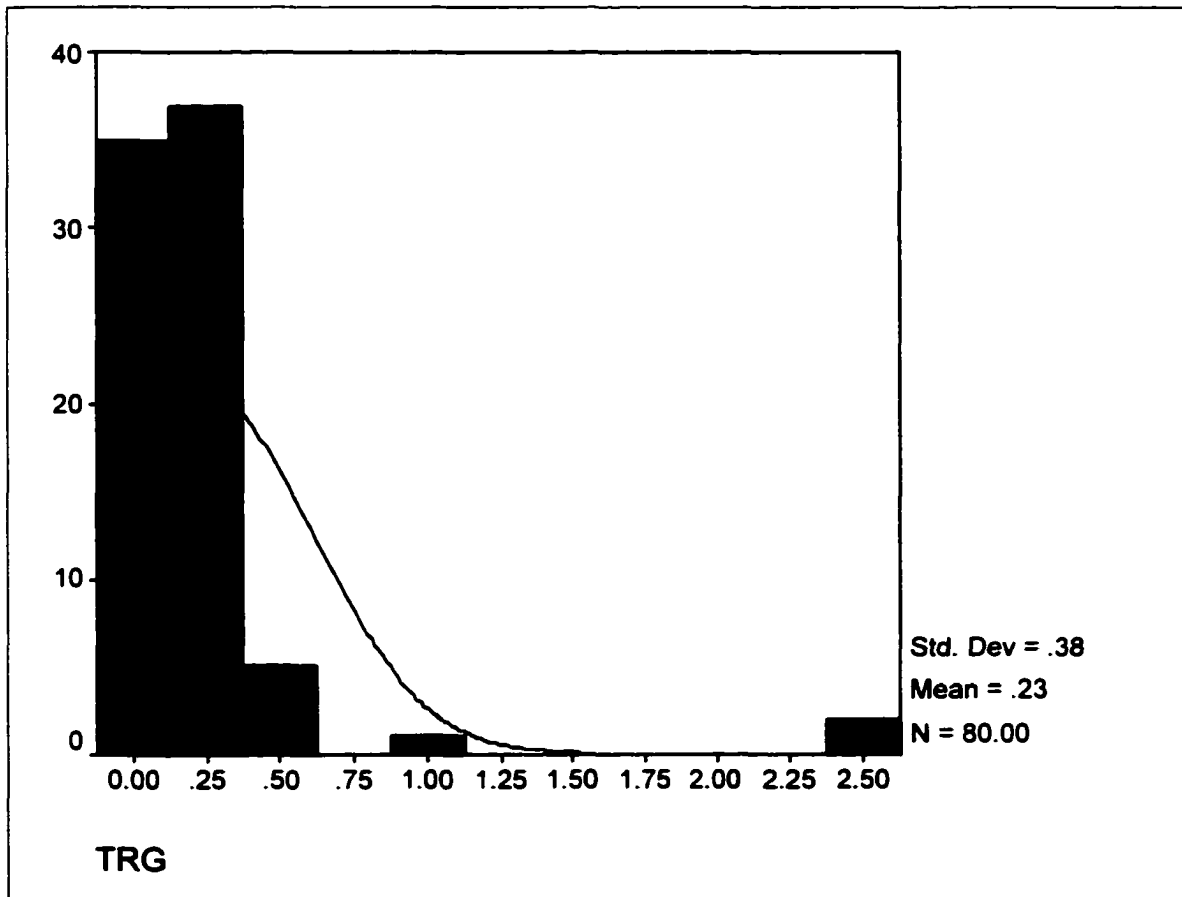
Test of Research Hypothesis 3a

The following research hypothesis was tested: There is no significant relationship between the organizational performance measure of Annualized Average Growth in Total Revenues (TRG) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS). An initial correlation analysis was performed to determine the linear relationship that exists between the OSS and TRG variables. This yielded a Pearson's Product-Moment Correlation Coefficient of - 0.03. Table 4.3 presents these results.

Table 4.3 – Correlation of Organizational Spirituality Score (OSS) and Annualized Average Total Revenue Growth (TRG) Measure

		OSS	TRG
OSS	Pearson Correlation	1	-0.030
	Sig.		0.790
	N	80	80
TRG	Pearson Correlation	-0.030	1
	Sig.	0.790	
	N	80	80

Given the weakness of the correlation ($p > 0.05$) the null hypothesis concerning the relationship between OSS and TRG could not be rejected. Thus, further investigation via One Way ANOVA was not warranted.

Sensitivity Study

To rule out the undue influence of outlier observations a sensitivity study was conducted. This involved the temporary removal of cases where the dependent variable observations had a standardized residual (indicating the number of standard deviations that an observation lies from its group mean) in excess of an absolute value of 3.0. This resulted in no significant changes to study findings associated with research hypothesis 3a.

Annualized Average Net Income Growth (NIG) Results

NIG Descriptive Statistics

The secondary research involved computing performance measures for each of the respondent organizations, including NIG. The results indicate a mean NIG of 1.10, with a standard deviation of 4.66. Figure 4.4 provides a histogram of the TRG measure.

Figure 4.4 – Histogram of Computed Annualized Average Net Income Growth (NIG) Measure

Std. Dev = 4.66
Mean = 1.1
N = 80.00

NIG
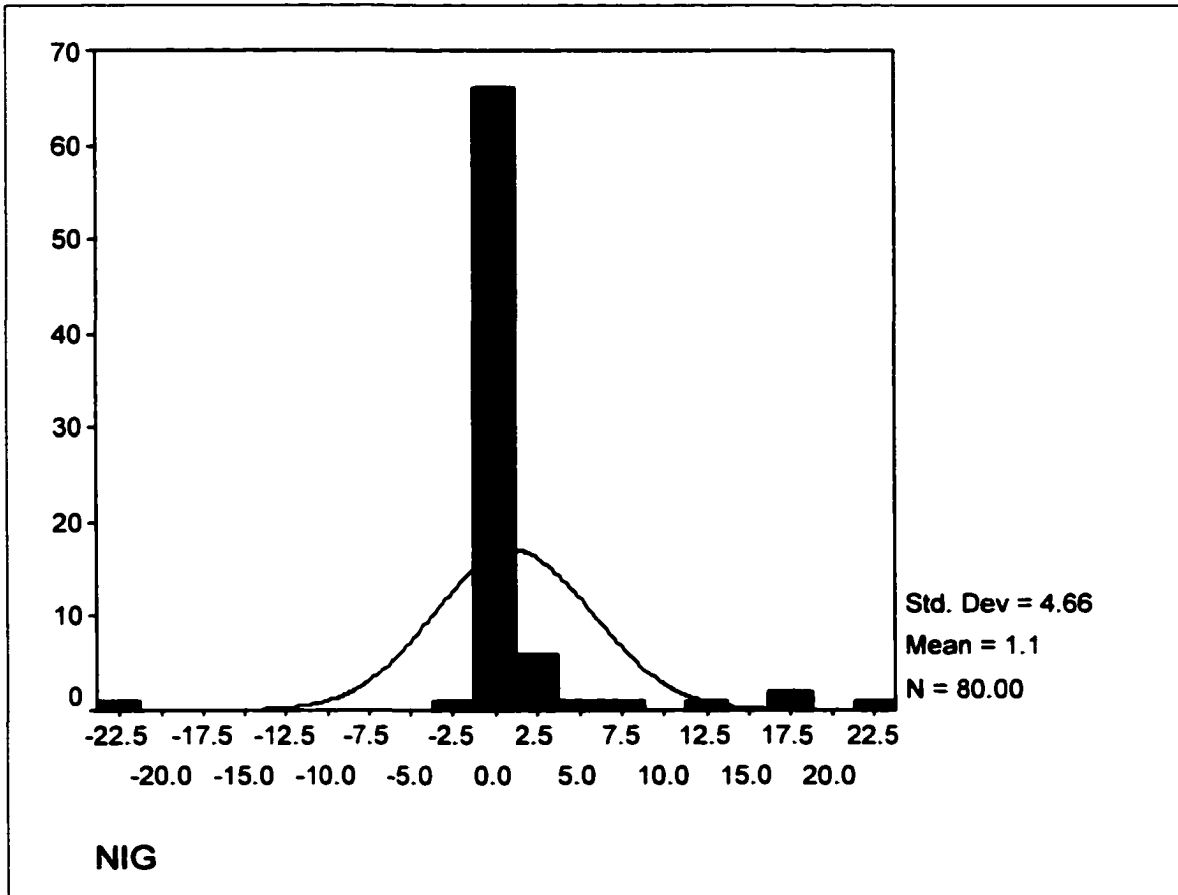
Test of Research Hypothesis 3b

The following research hypothesis was tested: There is no significant relationship between the organizational performance measure of Annualized Average Growth in Net Income (NIG) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS). An initial correlation analysis was performed to determine the linear relationship that exists between the OSS and NIG variables. This yielded a

Pearson's Product-Moment Correlation Coefficient of 0.370. Table 4.4 presents these results.

Table 4.4 – Correlation of Organizational Spirituality Score (OSS) and Annualized Average Net Income Growth (NIG) Measure

		OSS	NIG
OSS	Pearson Correlation	1	0.370
	Sig.		0.001
	N	80	80
NIG	Pearson Correlation	0.370	1
	Sig.	0.001	
	N	80	80

Given the strength of the correlation ($p < 0.01$) the null hypothesis concerning the relationship between OSS and NIG was subject. Thus, further investigation via One Way ANOVA was warranted. The cases were assigned to three groups based on the observed mean and standard deviation (65.6 and 12.04, respectively) for the OSS measure (High = 78 or above, Medium = 55 to 77, and Low = 54 or below). The ANOVA results indicate that a significant proportion of the outcome variance for NIG is attributable to the OSS variable. The overall F statistic was 7.920, which is significant at the $p < 0.01$ level. Thus, the null hypothesis is rejected. The R Squared result was 0.171, indicating that approximately 17% of the variance in NIG is uniquely attributable to OSS. The relationship between OSS and NIG is strong (using the standard convention of R Squared greater than 0.14), and thus it is concluded that the finding has statistical significance. It is further assumed that the finding also has practical importance given that no other published study concerning the relationship between OSS and NIG has been presented in the literature to date. The ANOVA results are highlighted in Table 4.5.

Table 4.5 – ANOVA for Organizational Spirituality Score (OSS) and Annualized Average Net Income Growth (NIG) Measure

Tests of Between-Subjects Effects					
Independent Variable = OSS, Dependent Variable = NIG					
Source	Sum of Squares	df	Mean Square	F	Sig.
OSS Group	292.838	2	146.191	7.920	0.001
Error	1421.240	77	18.458		
Total	1713.623	79			
R Squared = 0.171					

Given the rejection of the overall null hypothesis, post hoc analysis of pairwise contrasts for the three OSS groups was conducted. Tukey's procedure was employed for this analysis. The test showed a significant difference in the observed NIG means for the High OSS Group (4.807) versus both the Medium OSS Group (0.346) and the Low OSS Group (-0.8655), indicating that those firms in the High OSS Group achieved a NIG rate 4.460 higher than did those firms in the Medium OSS Group, and 5.672 higher than did those firms in the Low OSS Group (all significant at the $p < 0.01$ level). In short, the firms with strong Organizational Spiritual Normativity achieved a significantly higher growth rate in net income than did those firms with moderate or weak Organizational Spiritual Normativity. Table 4.6 presents these results.

Table 4.6 – Organizational Spirituality Score (OSS) Group Comparisons for Annualized Average Net Income Growth (NIG) Measure

OSS Group Pairwise Comparisons Independent Variable = OSS, Dependent Variable = NIG				95% Confidence Interval	
Baseline Group	Comparison Group	Mean Difference	Sig.	Lower Bound	Upper Bound
High	Medium	4.460*	0.001	1.532	7.389
	Low	5.672*	0.003	1.651	9.694
Medium	High	-4.460*	0.001	-7.389	-1.532
	Low	1.212	0.672	-2.190	4.614
Low	High	-5.672*	0.003	-9.694	-1.651
	Medium	-1.212	0.672	-4.614	2.190
Based on observed means. * The mean difference is significant at the 0.01 level.					

Sensitivity Study

To rule out the undue influence of outlier observations a sensitivity study was conducted. This involved the temporary removal of cases where the dependent variable observations had a standardized residual (indicating the number of standard deviations that an observation lies from its group mean) in excess of an absolute value of 3.0. This resulted in no significant changes to study findings associated with research hypothesis 3b.

Annualized Average Return on Assets (ROA) Results

ROA Descriptive Statistics

The secondary research involved computing performance measures for each of the respondent organizations, including ROA. The results indicate a mean ROA of 0.041, with a standard deviation of 0.04. Figure 4.5 provides a histogram of the ROA measure.

Figure 4.5 – Histogram of Computed Average Return on Assets (ROA) Measure
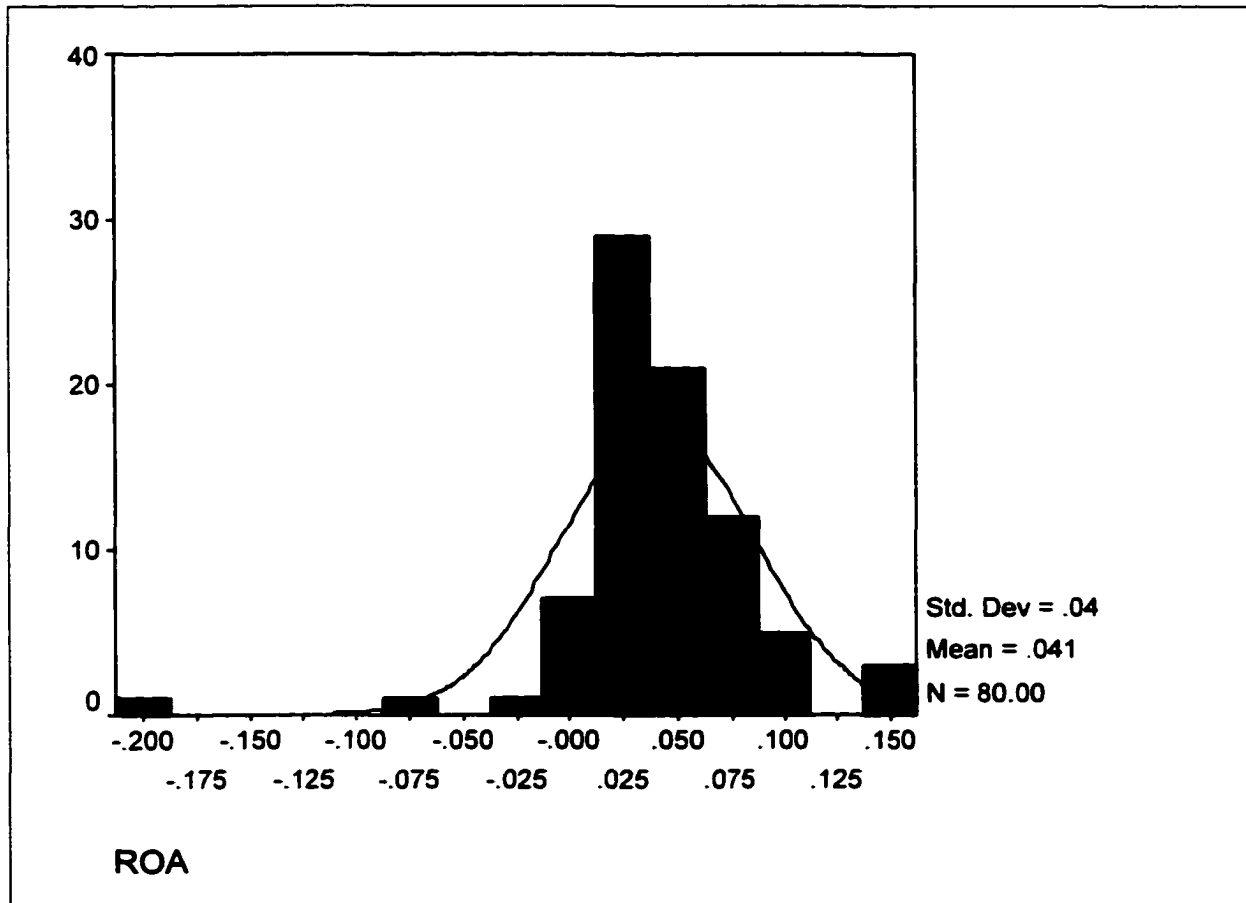
Test of Research Hypothesis 3c

The following research hypothesis was tested: There is no significant relationship

between the organizational performance measure of Annualized Average Return on

Assets (ROA) and the Organizational Spiritual Normativity measure of Organizational

Spirituality Score (OSS). An initial correlation analysis was performed to determine the

linear relationship that exists between the OSS and ROA variables. This yielded a

Pearson's Product-Moment Correlation Coefficient of 0.353. Table 4.7 presents these

results.

Table 4.7 – Correlation of Organizational Spirituality Score (OSS) and Average Return on Assets (ROA) Measure

		OSS	ROA
OSS	Pearson Correlation	1	0.353
	Sig.		0.001
	N	80	80
ROA	Pearson Correlation	0.353	1
	Sig.	0.001	
	N	80	80

Given the strength of the correlation (p < 0.01) the null hypothesis concerning the relationship between OSS and ROA was subject. Thus, further investigation via One Way ANOVA was warranted. The cases were assigned to three groups based on the observed mean and standard deviation (65.6 and 12.04, respectively) for the OSS measure (High = 78 or above, Medium = 55 to 77, and Low = 54 or below). The ANOVA results indicate that a significant proportion of the outcome variance for ROA is attributable to the OSS variable. The overall F statistic was 6.152, which is significant at the p < 0.01 level. Thus, the null hypothesis is rejected. The R Squared result was 0.138, indicating that approximately 14% of the variance in ROA is uniquely attributable to OSS. The relationship between OSS and ROA is moderate to strong (using the standard conventions of R Squared greater than 0.06 = moderate and 0.14 = strong), and thus it is concluded that the finding has statistical significance. It is further assumed that the finding also has practical importance given that no other published study concerning the relationship between OSS and ROA has been presented in the literature to date. The ANOVA results are highlighted in Table 4.8.

Table 4.8 – ANOVA for Organizational Spirituality Score (OSS) and Average Return on Assets (ROA) Measure

Tests of Between-Subjects Effects Independent Variable = OSS, Dependent Variable = ROA					
Source	Sum of Squares	df	Mean Square	F	Sig.
OSS Group	0.022	2	0.011	6.152	0.003
Error	0.137	77	0.002		
Total	0.159	79			
R Squared = 0.138					

Given the rejection of the overall null hypothesis, post hoc analysis of pairwise

contrasts for the three OSS groups was conducted. Tukey's procedure was employed for

this analysis. The test showed a significant difference in the observed ROA means for

the High OSS Group (0.0644) versus the Low OSS Group (0.0064), as well as the

Medium OSS Group (0.0413) versus the Low OSS Group (0.0064). The test results

specifically indicate that those firms in the High OSS Group achieved a ROA rate 0.0580

higher than did those firms in the Low OSS Group, and the firms in the Medium OSS

Group achieved a ROA rate 0.0349 higher than did those firms in the Low OSS Group

(both significant at the $p < 0.05$ level). In short, the firms with strong and moderate

Organizational Spiritual Normativity achieved a significantly higher rate of return on

assets than did those firms with weak Organizational Spiritual Normativity. Table 4.9

presents these results.

Table 4.9 – Organizational Spirituality Score (OSS) Group Comparisons for Average Return on Assets (ROA) Measure

OSS Group Pairwise Comparisons Independent Variable = OSS, Dependent Variable = ROA				95% Confidence Interval	
Baseline Group	**Comparison Group**	**Mean Difference**	**Sig.**	**Lower Bound**	**Upper Bound**
High	Medium	0.0231	0.141	-0.0057	0.0519
	Low	0.0580*	0.002	0.0185	0.0975
Medium	High	-0.0231	0.141	-0.0519	0.0057
	Low	0.0349*	0.039	0.0015	0.0684
Low	High	-0.0580*	0.002	-0.0975	-0.0185
	Medium	-0.0349*	0.039	-0.0684	-0.0015
Based on observed means. * The mean difference is significant at the 0.05 level.					

Sensitivity Study

To rule out the undue influence of outlier observations a sensitivity study was conducted. This involved the temporary removal of cases where the dependent variable observations had a standardized residual (indicating the number of standard deviations that an observation lies from its group mean) in excess of an absolute value of 3.0. This resulted in no significant changes to study findings associated with research hypothesis 3c.

Results for Research Question Four – Analyzing the Statistical Relationship Between Commonly Employed Interventions/Practices/Policies and Organizational Spiritual Normativity

The results obtained regarding research question four, including descriptive statistics for the SIPPS measure, as well as inferential statistics concerning the relationship between the SIPPS and OSS measures, are detailed below.

SIPPS Descriptive Statistics

The third section of the survey instrument was designed to obtain the necessary data to calculate a Spiritually-Related Interventions/Practices/Policies Score (SIPPS) based on each individual respondent's answers. The results indicate a mean SIPPS of 7.9 (lowest possible score =0, highest possible score = 15), with a standard deviation of 2.43. A histogram reflecting this obtained result is provided in the previous section outlining the results associated with research question two (Measuring Organizational Spiritual Normativity).

Test of Research Hypothesis 4

The following research hypothesis was tested: There is no significant relationship between the Organizational Spiritual Normativity measure of Spiritually-Related Interventions/Practices/Policies (SIPPS) and the Organizational Spiritual Normativity measure of Organizational Spirituality Score (OSS). An initial correlation analysis was performed to determine the linear relationship that exists between the SIPPS and OSS variables. This yielded a Pearson's Product-Moment Correlation Coefficient of 0.710. Table 4.4 presents these results.

Table 4.10 – Correlation of Spiritually-Related Interventions/Practices/Policies Score (SIPPS) and Organizational Spirituality Score (OSS)

		SIPPS	OSS
SIPPS	Pearson Correlation	1	0.710
	Sig.		0.000
	N	80	80
OSS	Pearson Correlation	0.710	1
	Sig.	0.000	
	N	80	80

Given the strength of the correlation (p < 0.001) the null hypothesis concerning

the relationship between SIPPS and OSS was subject. Thus, further investigation via

One Way ANOVA was warranted. The cases were assigned to three groups based on the

observed mean and standard deviation (7.9 and 2.43, respectively) for the SIPPS measure

(High = 10 or above, Medium = 6 to 9, and Low = 5 or below). The ANOVA results

indicate that a significant proportion of the outcome variance for OSS is attributable to

the SIPPS variable. The overall F statistic was 28.748, which is significant at the

p < 0.001 level. Thus, the null hypothesis is rejected. The R Squared result was 0.458,

indicating that approximately 46% of the variance in OSS is attributable to SIPPS. The

relationship between SIPPS and OSS is strong (using the standard convention of R

Squared greater than 0.14), and thus it is concluded that the finding has statistical

significance. It is further assumed that the finding also has practical importance given

that no other published study concerning the relationship between SIPPS and OSS has

been presented in the literature to date. The ANOVA results are highlighted in Table

4.11.

Table 4.11 – ANOVA for Spiritually-Related Interventions/Practices/Policies Score (SIPPS) and Organizational Spirituality Score (OSS)

Tests of Between-Subjects Effects Independent Variable = SIPPS, Dependent Variable = OSS					
Source	Sum of Squares	df	Mean Square	F	Sig.
SIPPS Group	4850.672	2	2425.336	28.748	0.000
Error	5736.793	68	84.365		
Total	10587.465	70			
R Squared = 0.458					

Given the rejection of the overall null hypothesis, post hoc analysis of pairwise

contrasts for the three SIPPS groups was conducted. Tukey's procedure was employed

for this analysis. The test showed a significant difference in the observed OSS means for

the High SIPPS Group (76.16) versus both the Medium SIPPS Group (65.16) and the

Low SIPPS Group (51.64), indicating that those firms in the High SIPPS Group achieved

an OSS 11.00 higher than did those firms in the Medium OSS Group, and 24.52 higher

than did those firms in the Low OSS Group (both significant at the $p < 0.001$ level).

Additionally, the observed OSS means were also significantly different between the

Medium SIPPS Group and the Low SIPPS Group, indicating that those firms in the

Medium SIPPS Group achieved an OSS 13.52 higher than did those firms in the Low

SIPPS Group (significant at the $p < 0.001$ level). In short, the firms that employed a

greater number of the spiritually-related interventions/practices/policies achieved a

significantly higher level of Organizational Spiritual Normativity. Table 4.12 presents

these results.

**Table 4.12 – Spiritually-Related Interventions/Practices/Policies Score (SIPPS)
Group Comparisons for Organizational Spirituality Score (OSS)**

SIPPS Group Pairwise Comparisons Independent Variable = SIPPS, Dependent Variable = OSS				95% Confidence Interval	
Baseline Group	Comparison Group	Mean Difference	Sig.	Lower Bound	Upper Bound
High	Medium	11.00*	0.000	4.82	17.18
	Low	24.52*	0.000	16.76	32.27
Medium	High	-11.00*	0.000	-17.18	-4.82
	Low	13.52*	0.000	6.63	20.40
Low	High	-24.52*	0.000	-32.27	-16.76
	Medium	-13.52*	0.000	-20.40	-6.63
Based on observed means. * The mean difference is significant at the 0.001 level.					

Sensitivity Study

To rule out the undue influence of outlier observations a sensitivity study was conducted. This involved the temporary removal of cases where the dependent variable observations had a standardized residual (indicating the number of standard deviations that an observation lies from its group mean) in excess of an absolute value of 3.0. This resulted in no significant changes to study findings associated with research hypothesis 4.

CHAPTER 5 – CONCLUSIONS AND RECOMMENDATIONS

The purpose of this study was to formally codify organizational spirituality and investigate its impact on organizational culture and organizational performance. Chapter one introduced the study, including an articulation of the four primary research questions. Chapter two presented a comprehensive review of the spirituality in the workplace literature. Chapters three and four outlined the methodology employed and related findings associated with the four primary research questions. The first section of this final chapter presents conclusions related to the study, organized around the four primary research questions. The second and third sections present recommendations for practitioners and for future research efforts surrounding organizational spirituality, respectively.

Conclusions Reached in Relationship with the Research Questions

Conclusions for Research Question One – Definition of Widely-Held Organizational Spiritual Norms

What are the normative aspects of organizational spirituality (based upon a broadly inclusive view of spirituality)?

Based upon a comprehensive review and analysis of the literature it is concluded that the following are the most widely-held spiritual norms (as applied to organizational contexts).

<u>Shared and Intentional Mission/Vision/Values</u> – the formal articulation and integration of mission, vision, and values into every aspect of the organizational system is of the utmost importance, essentially serving to outline the "orthodoxy" of the organization.

<u>Individual and Group Transparency</u> – open, honest, and non-defensive communication is valued and expected at all levels of the organization, and is not limited to work matters.

<u>Equity and Justice</u> – fairness, particularly surrounding performance management, compensation, and employee discipline, is of critical importance.

<u>Personal Consciousness and Accountability</u> – awareness of individual and aggregate group/corporate behavior and related consequences (both positive and negative) is continually reinforced throughout the organization.

<u>Ethical Clarity and Soundness</u> – the ethical code of the organization is unequivocally clear, and consistent with natural and moral law (i.e. the "golden rule").

<u>Task Significance</u> – the organization constantly reinforces the "higher-order" purpose of the organization, and the individual and corporate tasks completed therein.

<u>Individual/Organizational/Societal Interconnectedness</u> – the belief that organizational life is not a "zero-sum" game is widely propagated throughout the organization, reinforcing the symbiotic nature of open organizational systems.

<u>Inclusiveness</u> – the organization intentionally embraces and leverages people from all walks of life, without unnecessary regard for individual personal differences surrounding race, national origin, gender, age, or spirituality/religion.

<u>Servanthood</u> – the ideal of leadership as servantship is widely embraced and embodied by the senior management of the organization.

Sacredness of Organizational Life – the mindset that all organizational activity is inherently "sacred" as opposed to mundanely "secular" is widely shared throughout the organization.

Active Individual and Organizational Spiritual Practice/Expression – the organization fosters individual, group, and even corporate practice and expression of spirituality in the regular course of daily organizational life.

Together these values and standards provide an integrated model for understanding and evaluating organizational spirituality; namely, a Model for Codifying and Assessing Organizational Spiritual Normativity. Figure 5.1 presents this construct in graphic form.

Figure 5.1 – A Model for Codifying and Assessing Organizational Spiritual Normativity

A Model for Codifying and Assessing Organizational Spiritual Normativity

The Sources of Influence

The Normative Standards

The Core Influences on Organizational Spirituality

World Religions

Emerging Spiritual Faith Traditions

Contemporary Organizational Practice

The Universal Norms for Assessing Organizational Spirituality

• Shared and Intentional Mission/Vision/Core Values
• Individual and Group Transparency
• Equity and Justice
• Personal Consciousness and Accountability
• Ethical Clarity and Soundness
• Task Significance
• Individual/Organizational/Societal Interconnectedness
• Inclusiveness
• Servanthood
• Sacredness of Organizational Life
• Active Individual and Organizational Spiritual Practice

Viewed through the lens of the Organizational Spiritual Normativity construct, it is clear that several of the contemporary norms in organizational theory and practice (i.e. emphasis on mission/vision/core values, 360-degree evaluations, diversity management) have inherently spiritual underpinnings. Further, it is concluded that these norms would not have emerged as such outside of the influence of spiritual faith traditions. Stated another way, it is precisely due to the influence of broad-based spirituality and related philosophies that many of today's commonly employed organizational interventions/practices/policies have become standard practice.

This represents a significant re-conceptualization and broadening of what has heretofore been regarded as organizational spirituality. At the same time, several of the organizational spirituality norms contained in the proposed model are more consistent with what has been widely discussed in the spirituality at work literature (i.e. open systems theory, dialogos, accommodation/fostering of spiritual faith practice at work). However, these norms have yet to be articulated in a unified and universally applicable construct. Thus, for these reasons the conceptualization of the herein applied Organizational Spiritual Normativity construct is considered an important study conclusion in that there has yet to be such a model proposed in the spirituality at work literature.

Conclusions for Research Question Two – Measuring Organizational Spiritual Normativity

How reflective of Organizational Spiritual Normativity are the overall business activities, individual employee behaviors and beliefs, and commonly employed interventions/practices/policies of Fortune 500 firms? In short, which Fortune 500 firms are more spiritually normative?

The normative aspects of organizational spirituality (outlined above) were successfully integrated into the researcher developed survey instrument. An analysis of the data gathered via this instrument led to the following important conclusions:

- The survey instrument does indeed measure Organizational Spiritual Normativity in a meaningful and consistent manner. In short, it has been established that the instrument is internally reliable.

- Organizational Spiritual Normativity can apparently be objectively measured and quantified via the Organizational Spirituality Score (OSS) derived from the survey responses.

- Fortune 500 firms demonstrate varying levels of Organizational Spiritual Normativity. Specifically, 20% of the firms that participated in the study can be characterized as strongly spiritually normative, 66% can be characterized as moderately spiritually normative, and 14% as demonstrating weak spiritual normativity. The statistical evidence suggests these findings can be generalized to the entire population of Fortune 500 firms.

- Fortune 500 firms vary significantly in their implementation of common Spiritually-Related Interventions/Practice/Policies (SIPPS). Specifically, 27% of the firms that

participated in the study employ a high number of spiritually-related interventions/practices/policies, 53% employ a moderate number of spiritually-related interventions/practices/policies, and 20% employ very few spiritually-related interventions/practices/policies. Once again, the statistical evidence suggests that these findings can be generalized to the entire population of Fortune 500 firms.

Thus, the most important conclusions that can be drawn from the study regarding research question two are that Organizational Spiritual Normativity can be objectively measured and quantified, and that Fortune 500 firms differ significantly on this measure.

Conclusions for Research Question Three – Analyzing the Statistical Relationship Between Organizational Spiritual Normativity and Organizational Performance

Is there a difference in the long-term financial performance of those Fortune 500 firms that are stronger in terms of their Organizational Spiritual Normativity and those firms that are less spiritually normative?

An analysis of the Organizational Spiritual Normativity data gathered via the survey instrument in relationship to computed long-term organizational performance measures led to the following important conclusions:

- Organizational Spiritual Normativity does not influence growth in total revenues among Fortune 500 firms. Specifically, the analysis showed no significant differences in total revenue growth rates for those firms that demonstrate stronger Organizational Spiritual Normativity versus those firms that demonstrate moderate and/or weak Organizational Spiritual Normativity. The statistical evidence suggests these findings can be generalized to the entire population of Fortune 500 firms.

- Organizational Spiritual Normativity influences firm profitability among Fortune 500 firms. Specifically, it is concluded that those firms characterized by strong Organizational Spiritual Normativity achieve significantly higher rates of profitability growth than do their less spiritually normative peer organizations. Moreover, it is further concluded that those firms characterized by moderate to strong Organizational Spiritual Normativity achieve significantly higher rates of return on assets than do firms characterized by weak Organizational Spiritual Normativity. The statistical evidence suggests these findings can be generalized to the entire population of Fortune 500 firms.

Thus, the most important conclusions that can be drawn from the study regarding research question three are that Organizational Spiritual Normativity significantly influences organizational performance among Fortune 500 firms, and that those firms characterized by moderate to strong Organizational Spiritual Normativity are more profitable than are those firms characterized by weak Organizational Spiritual Normativity.

Conclusions for Research Question Four – Analyzing the Statistical Relationship Between Commonly Employed Interventions/Practices/Policies and Organizational Spiritual Normativity

Is there a relationship between commonly employed interventions/practices/policies and Organizational Spiritual Normativity?

An analysis of the commonly employed interventions/practices/policies data gathered via the survey instrument in relationship to Organizational Spiritual Normativity led to the following important conclusion:

- Employment of spiritually-related interventions, practices, and policies influences Organizational Spiritual Normativity within Fortune 500 firms. Specifically, it is concluded that those firms that employ a high number of the spiritually-related interventions/practices/policies achieve a significantly higher level of Organizational Spiritual Normativity than do those firms that employ either a moderate number, or very few, of these same interventions/practices/policies. The statistical evidence suggests these findings can be generalized to the entire population of Fortune 500 firms.

- The strong causal relationship between the implementation of these spiritually-related interventions/practices/policies and Organizational Spiritual Normativity supports the preliminary conclusion that the survey instrument, and the theoretical construct of Organizational Spiritual Normativity applied therein, is valid in terms of its content.

Thus, the most important conclusions that can be drawn from the study regarding research question number four are that the implementation of commonly employed spiritually-related interventions, practices, and policies results in significantly higher Organizational Spiritual Normativity among Fortune 500 firms, and the theoretical construct of Organizational Spiritual Normativity and related survey instrument demonstrate content validity.

Recommendations for Practitioners

Based on the findings of this study of Organizational Spiritual Normativity and its impact on organizational culture and performance the following recommendations are offered to organizational practitioners, particularly those with general management, strategic human resource management, and organizational development responsibilities:

- **Embrace Spirituality as Standard Practice** – A review of the contemporary landscape clearly indicates that organizational life is intimately interwoven with, and influenced by, spiritual values and beliefs. Thus, organizations must once and for all remove the stigma of spirituality not being applicable to the "secular" world of business. Like it or not, normative contemporary business practices are strongly shaped by spirituality-based philosophies and worldviews.

- **Conduct an Organizational Spirituality Audit** – Using the Model for Codifying and Assessing Organizational Spiritual Normativity (see Figure 5.1) as a guide, organizations must conduct an assessment of their current business practices and individual employee beliefs and actions to gauge the current level of congruence with the articulated spiritual norms.

- **Intentionally and Thoughtfully Leverage Organizational Spiritual Normativity as a Sustainable Source of Competitive Advantage** – Given the demonstrated connection between organizational spirituality and profitability it becomes clear that organizations must strive to achieve a high level of Organizational Spiritual Normativity. However, it is important that organizations not jump on the spirituality bandwagon as simply a means to a more profitable end. Such efforts must be motivated first and foremost by a sincere desire to more holistically engage an

increasingly sophisticated, spiritually-motivated, and valuable workforce – the ultimate source of all truly sustainable competitive advantage. With holistic employee engagement as the primary focus, increased profitability simply comes as a by-product of nobler end.

Recommendations for Future Research

While this study has resulted in several significant findings and conclusions regarding connections between spirituality and organizational performance, it has merely scratched the surface in terms of what can be done to further the research agenda in this vein. Thus, the following recommendations are offered regarding opportunities for continued research, both for this researcher as well as for members of the management and organizational theory and spirituality at work academies at large:

- **Further Investigate the Lack of Relationship Between Organizational Spirituality and Total Revenue Growth** – The lack of significant relationship between Organizational Spiritual Normativity and average total revenue growth demands further attention, particularly in light of the observed relationship between measures of organizational profitability and organizational spirituality. One possible explanation is that simply increasing revenues is one thing, but increasing profitability is an altogether different matter. This potential explanation appears to be supported by the study data, at least preliminarily. That is, while virtually all of the firms that participated in the study enjoyed relative prosperity in terms of revenue growth during the 1991-2000 time period, these same firms demonstrated significant variance in terms of profitability during the same time period. Put simply, virtually

all of the firms grew, but only selected organizations did so in an increasingly profitable manner.

- **Expand the Size and Scope of the Study Sample** – While 14% of the firms listed in the Fortune 500 participated in the study, and the statistical evidence supports generalization of study findings to the entire population of Fortune 500 firms, a larger sample of data should be gathered to augment the original data set. This will only serve to enhance and strengthen the study findings. Specifically, it would be helpful to expand the study to include the participation of a greater number of Fortune 500 firms, in addition to non-Fortune 500 firms as well. Moreover, the sample must be augmented to include individual respondent data from all functional areas and hierarchical levels. Assuming that the population of organizations is accurately represented by Fortune 500 firms (in terms of subject attributes) and that key informant responses accurately represent the beliefs and actions of their organizational co-workers, the study findings should prove universally applicable to all organizations.

- **Analyze the Study Data in Greater Detail** – The study data, either original or augmented, must be analyzed in greater detail. This should include an investigation of geographic and industry differences. Additionally, it may prove profitable to develop sub-groupings and related sub-grouping scores for the Organizational Spirituality Score (OSS) related questions from the survey instrument (i.e. a "task significance" grouping, a "transparency" grouping, etc.), and further investigate relationships between the grouping scores and organizational performance measures. However, this would most probably require that additional questions be added to the

survey. Moreover, the data gathered concerning the implementation of Spiritually-Related Interventions/Practices/Policies (SIPPS) must be further analyzed to identify the strength of relationship that exists between the individual (as opposed to the aggregate) interventions/practices/policies and organizational spirituality. Along these lines, it may also be helpful to more directly investigate the relationship between SIPPS and organizational performance measures.

- **Add More Dependent Variables** – Lastly, the set of dependent variables included in the study must be enlarged. The list of potentially related measures is endless, but among the most compelling are employee turnover rate, revenues per employee, return on sales, return on equity, earnings per share, and general stock performance.

APPENDIX A – SURVEY COVER LETTER

August 8, 2001

Ms. Senior Executive
Chairman and CEO
Fortune 500 Firm, Inc.
111 Company Way
New York, New York 10020

Dear Ms. Executive,

As you know, the topic of spirituality in the workplace has gained prominence over the last several years. In fact, the July 9, 2001 Fortune Magazine cover story references some striking figures:

* 95% of Americans believe in "God", or a "Higher Power"
* 78% of Americans desire daily "Spiritual Growth", up from just 20% in 1994

As the largest and most influential members of the American business landscape, it is clearly incumbent upon Fortune 500 firms to address these realities head on.

To this end, I am conducting an academic study of "organizational spirituality" as an element of organizational culture and as an influence on organizational performance within Fortune 500 firms. Only the top five executives from each firm are being asked to participate – thus, your response is very important. The enclosed survey has been designed to allow for completion in less than 15 minutes. In all cases the confidentiality of survey respondents and their employer organizations in relationship to study findings will be maintained. Thank you in advance for your partnership in this effort. In return, I will be willing to provide you with an executive summary of the research findings.

Sincerely,

Scott A. Quatro
Instructor of Management

APPENDIX B – ORGANIZATIONAL SPIRITUALITY SURVEY

Organizational Spirituality

Fortune 500 Senior Executive Survey

The purpose of this research project is to provide Fortune 500 senior executives with information that can be leveraged to improve overall organizational performance. The focus is on "organizational spirituality" as an element of organizational culture and as an influence on organizational practices, policies, procedures, and operational performance. While the survey asks several questions pertaining to individual expressions of spirituality it is in no way connected to any one specific faith or religious perspective. Moreover, participation in the study is on a completely voluntary basis and failure to complete the survey on the part of an individual subject will in no way be prejudicial to said subject. In all cases the confidentiality of individual subjects and their employer organizations in relationship to study findings will be strictly maintained. The survey has been designed to allow for completion in less than 15 minutes. Thank you in advance for your contribution to this effort. Any questions or concerns may be directed to Scott A. Quatro (principal investigator) by phone at (712) 722-6325 or via e-mail to quatro@dordt.edu, or to Jerry W. Gilley (research advisor) by phone at (970) 377-9298 or via e-mail to jerry.gilley@cahs.colostate.edu.

Section 1 – General Background Information

Please provide some general background information about yourself.

1. Gender: Male _____   Female _____

2. Number of years of experience in current industry: 0 to 5   _____

     5 to 10   _____

     10 to 20   _____

     More than 20   _____

3. Number of years employed by current organization: 0 to 5   _____

     5 to 10   _____

     10 to 20   _____

     More than 20   _____

4. Which functional area best describes your current role within your organization?

    a. Production or Operations Management _____

    b. Sales and Marketing   _____

    c. Finance and Accounting   _____

    d. Human Resource Management   _____

    e. Information Systems   _____

    f. General Management   _____

    g. Legal Counsel   _____

    h. Research and Development   _____

5. For the *purposes of this study only*, "spirit" is defined as a "life-giving force that exists at the center of every human being that is created by and/or connected to God, or a Higher Power". "Spirituality" is defined as "intentionally living out a belief in the spirit so as to maximize the meaning, quality, and purpose of one's life *and* the lives of others". Based on this definition, to what extent do you agree with the statement "I am a spiritual person"?

Completely Disagree	Somewhat Agree	Completely Agree

<— ———————————————————————————————— —>

| 1 | 2 | 3 | 4 | 5 |
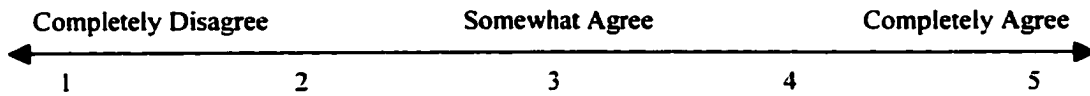
Section 2 – Organizational Characteristics Information

Please provide some information based on your personal experiences and/or impressions concerning your current organization.

For questions 6 through 21 please indicate the extent to which you agree with the following statements:

6. The jobs at all levels in my current organization are designed in such a way as to be holistically (hands, heart, mind, and spirit) engaging.
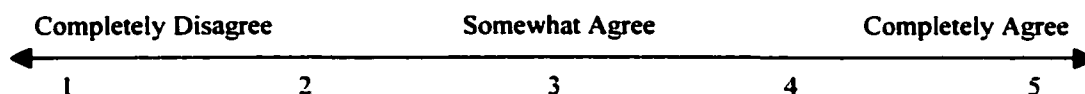
Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5

7. The employees in my current organization have a clear and detailed understanding of how the work that they perform on a daily basis fits into the "bigger picture" of the organization.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
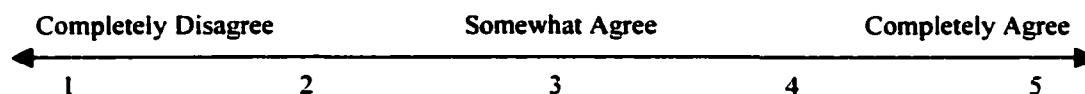
8. The employees in my current organization feel comfortable in freely speaking their minds and hearts without fear of negative repercussions.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
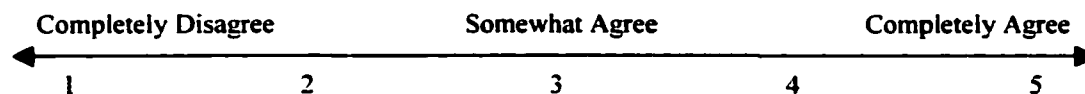
9. Performance shortfalls are handled in a transparent and just manner within my current organization.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
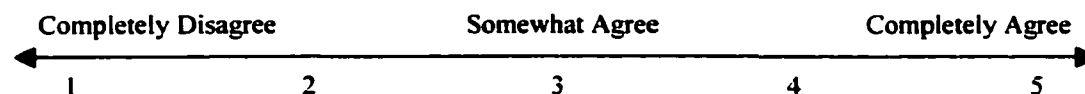
10. My current organization has a meaningful mission (purpose for existing) that is clearly articulated and well known at all levels of the organization.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
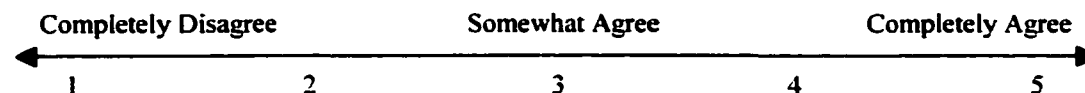
11. My current organization has a compelling vision (goal for the future) that is clearly articulated and well known at all levels of the organization.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
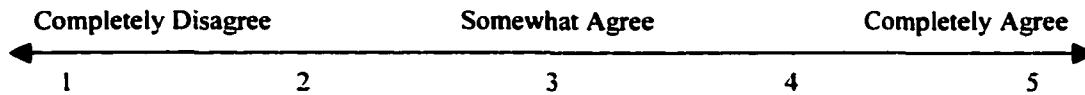
12. My current organization has a set of "non-negotiable" central or core values that guide the behavior of employees at all levels of the organization.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
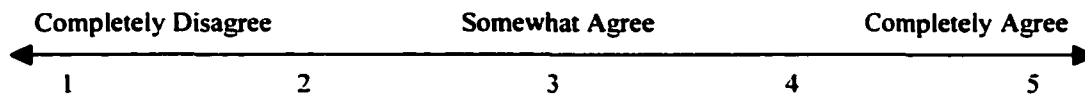
13. The monetary wealth generated by my current organization is equitably distributed to employees at all levels of the organization.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
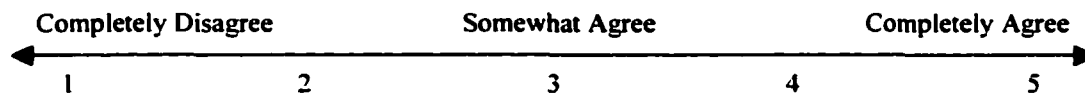
14. The culture of my current organization reinforces personal consciousness of, and accountability for, individual employee words and actions.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
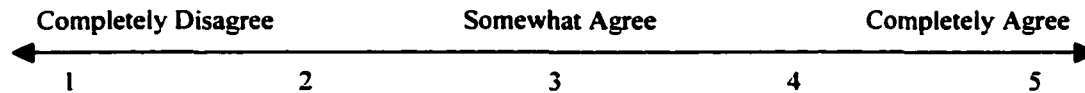
15. The culture of my current organization reinforces ethically and morally sound behavior as the expected norm.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
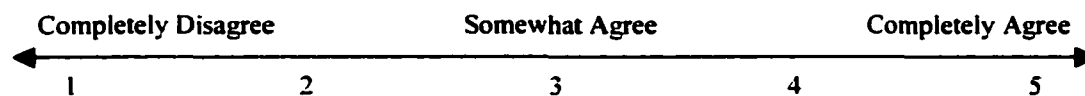
16. The employees in my current organization have deeply meaningful relationships with colleagues.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
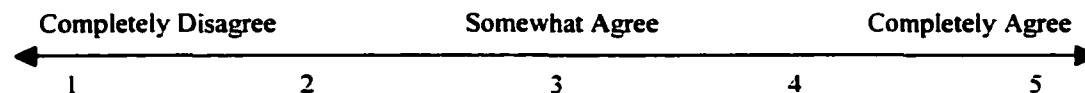
17. The employees in my current organization are comfortable discussing "matters of the heart" (e.g. emotions, feelings) with colleagues on the work premises.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
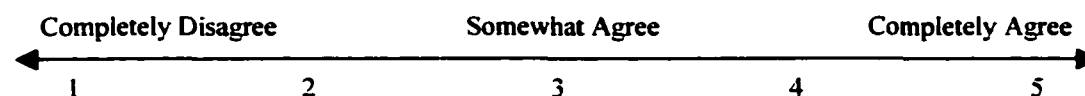
18. The employees in my current organization are comfortable discussing "matters of the spirit" (e.g. prayer, meaning of sacred writings, ultimate purpose in life, connectedness of the universe) with colleagues on the work premises.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
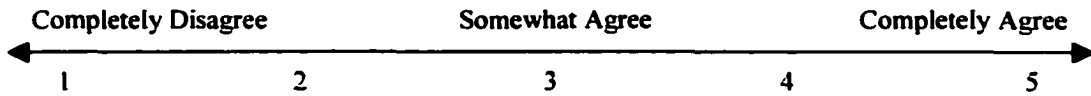
19. The culture of my current organization reinforces inclusiveness in regards to individual employee differences.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
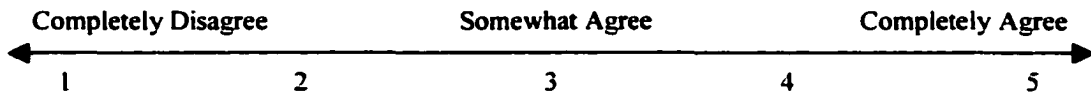
20. The work that the employees in my current organization perform is meaningful and serves to fulfill a "higher purpose" in the community, nation, or world.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
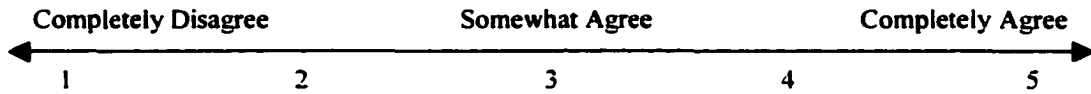
21. The employees in my current organization are more concerned with contributing to societal benefit as a whole than they are with personal success or gain.

Completely Disagree		Somewhat Agree		Completely Agree
1	2	3	4	5
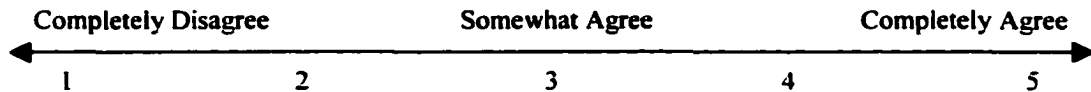
For questions 22 through 25 please indicate your personal experience/response:

22. I consult the Koran, Bible, Torah, Book of Mormon, or some other similar "sacred writings" for guidance in conducting my work activities within my current organization.

Never		Monthly		Daily
1	2	3	4	5
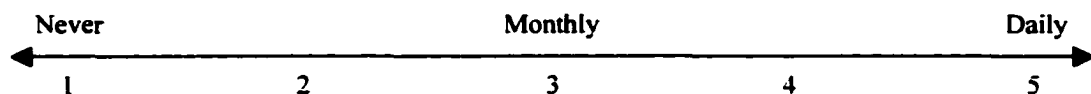
23. I meditate, pray, channel, or conduct some other similar activity on the premises of my current organization.

Never		Monthly		Daily
1	2	3	4	5

24. I have meditated, prayed, channeled, or conducted some other similar activity with a colleague on the premises of my current organization.

Never		Once		More than Once
1	2	3	4	5

25. For each pair of words listed below, please choose the one that is *most descriptive* of your current organization. Please choose *only one* word from each pair.

Caring	_____	or	Impersonal	_____
Principled	_____	or	Flexible	_____
Proud	_____	or	Humble	_____
Optimistic	_____	or	Rational	_____
Aggressive	_____	or	Intentional	_____

Section 3 – Organizational Interventions/Practices/Policies Information

Please provide some information concerning the interventions/practices/policies employed by your current organization.

For each of the organizational interventions/practices/policies listed below please indicate if your current organization employs them, as well as *your personal assessment* of the impact each has on your firm's organizational spirituality. For instance, if your organization only employs 6 of the 15 choices listed only mark those six, and then rank them from 1 (most significant) to 6 (least significant) in terms of their impact.

Intervention/Practice/Policy	Employed? (Check if Yes)	Ranking
1. Training with spiritual content		
2. Spiritually influenced vision/mission statements		
3. Paid time-off for religious/community service activities		
4. Work-group or departmental retreats		
5. Self-managed work teams		
6. 360-degree performance evaluation		
7. "Open" physical work environment		
8. Company-wide meetings/celebrations		
9. Team-based performance evaluation		
10. Compensation ratios (for highest to lowest paid employees)		
11. Corporate sponsorship of charities/causes		
12. Employee wellness program		
13. Mentor program		
14. Flexible work hours		
15. Company counselor/chaplain/spiritual moderator		

****

Would you like to be provided with an executive summary of the research findings?

Yes _____   No _____

It is anticipated that these findings will be available sometime prior to June 1, 2002. Thank you again for your partnership in this effort.

****

APPENDIX C – RESPONDENT FOLLOW-UP COVER LETTER

June 12, 2002

Ms. Senior Executive
Chairman and CEO
Fortune 500 Firm, Inc.
111 Company Way
New York, New York 10020

Dear Ms. Executive,

Thank you for participating in my research study of "organizational spirituality" as an element of organizational culture and as an influence on organizational performance within Fortune 500 firms.

As promised I am enclosing an executive summary of the study findings. I believe the results of the project are striking, and present a compelling case for America's largest business organizations to intentionally address organizational spirituality as a strategic imperative. To guarantee the confidentiality of the organizations that participated in this endeavor none of the study variables or findings are connected directly to any of the individual organizations.

Please feel free to contact me to further discuss the project or my on-going research agenda. My contact information is as follows:

Prior to July 15, 2002	After July 15, 2002
Dordt College	Grand Canyon University
Business Administration Department	College of Business
498 4th Avenue NE	3300 West Camelback Road
Sioux Center, Iowa 51250	Phoenix, Arizona 85017
Voice: (712) 722-2561	Voice: (602) 589-2823
Fax: (712) 722-1198	Fax: (602) 589-2054
E-Mail: quarto@dordt.edu	E-Mail: squatro@grand-canyon.edu

Sincerely,

Scott A. Quatro
Assistant Professor of Management

APPENDIX D – LIST OF ORGANIZATIONAL RESPONDENTS

Administaff, Inc.	Kroger Co.
Allstate Corporation	Lear Corporation
Ashland Inc.	Lennar Corporation
Avis Group Holdings, Inc.	LTV Corporation
Avnet, Inc.	Manpower Inc.
Ball Corporation	Marriott International, Inc.
Bethlehem Steel Corporation	Merisel, Inc.
Boeing Company	New York Times Company
Brunswick Corporation	Northeast Utilities
Burlington Northern Santa Fe Corporation	OGE Energy Corp.
Cardinal Health, Inc.	ONEOK Inc.
Computer Associates International, Inc.	Owens & Minor, Inc.
Conoco Inc.	PacifiCare Health Systems, Inc.
Costco Wholesale Corporation	PepsiCo, Inc.
Dana Corporation	PPG Industries, Inc.
Darden Restaurants, Inc.	Premcor Inc.
Deere & Company	Puget Energy, Inc.
Delphi Automotive Systems Corporation	Regions Financial Corporation
Dollar General Corporation	Ryder System, Inc.
Dominion Resources, Inc.	SBC Communications Inc.
Dover Corporation	SCI Systems, Inc.
DTE Energy Company	ServiceMaster Company
Dynegy Inc.	Sherwin-Williams Company
Eaton Corporation	Smurfit-Stone Container Corporation
Encompass Services Corporation	Sodexho, Inc.
Engelhard Corporation	Southwest Airlines Co.
FedEx Corporation	Spherion Corporation
First Data Corporation	Tenet Healthcare Corporation
FirstEnergy Corp.	Tenneco Automotive Inc.
FMC Corporation	TXU Corp.
Gannett Co., Inc.	Tyson Foods
Hughes Supply, Inc.	United Auto Group, Inc.
Interpublic Group of Companies, Inc.	United Stationers Inc.
Johnson & Johnson	USX Corporation
Kellogg Company	Williams Companies, Inc.
KeySpan Corporation	

* N = 71, with 9 organizations that had 2 respondents each

APPENDIX E – STUDY DATA SET

Case #	OSS	NIG	TRG	ROA	SIPPS	Case #	OSS	NIG	TRG	ROA	SIPPS
56	90	0.36	0.22	0.153	12	46	67	1.54	0.10	0.063	5
5	85	0.34	0.13	0.060	12	62	67	0.47	2.39	0.043	5
40	84	0.12	0.12	0.050	12	11	66	1.49	0.01	0.037	6
43	84	1.51	0.18	0.087	13	3	65	0.36	0.11	0.030	8
69	84	21.51	0.33	0.063	9	22	65	0.11	0.16	0.030	9
16	80	0.44	0.08	0.053	9	59	65	0.69	0.28	0.011	6
34	80	12.46	0.07	0.025	9	28	64	0.12	0.11	0.063	8
77	80	16.52	0.24	0.030	12	41	64	-0.60	0.09	-0.003	10
2	79	0.96	0.11	0.047	8	18	63	-2.25	0.07	0.030	8
19	79	0.46	0.13	0.043	10	26	62	0.18	0.09	0.047	7
24	79	0.23	0.12	0.093	10	65	62	3.28	0.17	0.060	6
6	78	0.34	0.13	0.060	8	63	61	0.47	2.39	0.043	5
20	78	0.90	0.22	0.010	11	79	61	0.03	0.17	0.042	9
57	78	0.36	0.22	0.153	6	17	60	0.40	0.34	0.027	6
75	78	3.88	0.08	0.093	10	60	60	0.69	0.28	0.011	6
78	78	16.52	0.24	0.030	10	61	60	-0.02	-0.01	-0.010	7
27	76	0.17	0.24	0.050	12	1	59	0.63	0.88	0.093	9
21	75	1.15	0.30	0.043	12	35	59	0.13	0.16	0.027	7
58	75	0.30	0.07	0.013	7	44	59	0.19	0.15	0.035	5
8	74	0.52	0.52	0.060	7	4	58	-0.11	0.03	0.013	5
12	74	0.17	0.10	0.083	8	38	58	0.42	0.07	0.063	7
45	74	0.00	0.05	0.040	8	66	58	0.03	0.01	0.037	6
55	74	0.33	0.36	0.073	7	9	57	0.52	0.52	0.060	7
71	73	0.77	0.06	0.027	9	39	57	0.83	0.14	0.025	8
49	72	0.09	0.09	0.075	7	67	57	0.24	0.24	0.012	7
25	71	0.03	0.13	0.020	6	80	57	0.03	0.17	0.042	9
68	71	0.29	0.29	0.030	8	76	56	0.06	0.17	0.041	5
73	71	0.12	0.16	0.033	5	37	55	0.20	0.42	0.023	5
7	70	0.38	0.22	0.063	10	10	54	0.50	0.39	0.026	4
23	70	0.46	0.17	0.050	12	74	53	0.12	0.16	0.033	5
42	70	1.10	0.27	0.050	7	51	52	0.11	0.36	0.017	12
50	70	0.11	0.36	0.017	5	64	52	-1.11	0.10	-0.200	6
52	70	-0.72	0.03	-0.067	10	72	52	-0.14	-0.11	-0.033	6
70	70	0.07	0.05	0.083	10	31	49	1.10	0.32	0.063	5
15	69	0.36	0.02	0.110	6	30	47	2.42	0.05	0.080	9
47	69	0.25	0.11	0.143	8	32	44	0.57	0.01	0.030	8
13	68	0.33	0.10	0.021	8	48	44	1.62	0.01	0.040	5
54	68	0.50	0.09	0.033	5	33	38	0.34	0.01	0.013	5
14	67	0.90	0.20	0.020	10	53	33	8.12	0.41	0.020	3
36	67	0.05	0.02	0.097	8	29	28	-22.67	0.19	0.007	3

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