

A Model for Organizational Identity: Exploring the Path to Sustainability During Change

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Mergers and other change events dramatically transform organizational life, often altering an organization's essential nature—its identity. In an effort to more effectively manage the change process, it is important to understand the impact of change and those aspects that, if changed, put the organization's identity at greatest peril. This study qualitatively explored these issues by examining the content of identity and the effects of change in a commercial aviation company that was undergoing a merger. Drawing upon Albert and Whetten's definition of organizational identity, a model of organizational attributes emerged that consisted of core attributes and application attributes. The data illustrate that the organization's core attributes—its central purpose and distinctive philosophy—constitute organizational identity. The second category of application attributes—priorities, practices, and projections—have varying degrees of fluidity and may be altered without losing the central, distinctive, and enduring essence of the organization. The article concludes with propositions for future research.

Change, an inescapable phenomenon of modern organizational life, dramatically transforms the landscape of organizations and creates an environment of incertitude (Bastien, Hostager, & Miles, 1996). Even when organizational change is an avenue for survival, it has the power to stir up emotions and produce feelings of loss and uncertainty (Mirvis & Marks, 1992; Overmyer Day, 1993; Schweiger, Csiszar, & Napier, 1994). Much of this imbalance is rooted in employees' fears about the sustainability of the organization's identity. These fears can be exacerbated when employees possess strong feelings of identification with the content of the identity that is being altered.

The essence of an organization is its identity. It is a source of stability, a definition for its members, and a basis for action (Albert & Whetten, 1985; Ashforth & Mael, 1996). Given the potential for this loss, certain questions

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about identity become significant, especially during times of change. In particular, what aspects of an organization must be preserved to sustain its very nature? Likewise, is there a way to undergo change without destroying an organization's essence? These are key questions for the human resource development (HRD) professional who often guides the organizational change process.

Although theorists see identity loss as an important issue, little inquiry has occurred in an actual merger environment (McEntire, 1994). Within the context of a merger, this study examines the identity construct using Albert and Whetten's (1985) definition. This change event was a useful context for studying identity content because mergers often ignite feelings of loss of identity, making the content of that identity more easily discussed. The primary purpose of this case study was to illuminate and develop organizational identity theory, which in turn can improve HRD practice.

Theoretical Frame

A review of the literature on the human issues in mergers (Buono & Bowditch, 1990; McEntire, 1994; Napier, 1989; Schweiger, Csiszar, & Napier, 1993) revealed that feelings of identity loss often cripple people emotionally not only during the change but also long into the future (Cartwright & Cooper, 1996; McEntire & Bentley, 1996; Nahavandi & Malekzadeh, 1993). Most of the research that touches on this loss is embedded in varying definitions of organizational identity. A great deal of literature on organizational identity exists that is theoretical (Albert & Whetten, 1985; Ashforth & Mael, 1996; Bouchikhi & Kimberly, 1996; Dutton, Dukerich, & Harquail, 1994; Dutton & Penner, 1993; Fiol & Kooor-Misra, 1997; Hatch & Schultz, 1997; Whetten & Godfrey, 1998). However, there is a limited but growing body of organizational identity research (Dutton & Dukerich, 1991; Elsbach & Kramer, 1996; Gioia & Thomas, 1996; Golden-Biddle & Rao, 1997; Gustafson, 1995; Gustafson & Reger, 1995). Much of this work is based on a noted article by Albert and Whetten (1985) that defines the three essential criteria for organizational identity: central character, distinctiveness, and temporal continuity. "Identity goes to the core of what something *is*, what fundamentally defines that entity" (Ashforth & Mael, 1996, p. 20).

From an organizational identity theory perspective, there has been limited research on the shared aspects of organizational identity (Dutton & Dukerich, 1991; Gustafson, 1995), what Dutton and Penner (1993) have labeled as "the collective version of organizational identity" (p. 104). A case study by Dutton and Dukerich (1991) revealed six attributes that members used to characterize the identity of the Port Authority of New York and New Jersey. One of these characteristics was similarly described by all informants—a professional organization with a uniquely technical expertise, ill

suiting to social services activities. The remaining five characteristics were each suggested by fewer than half of the informants. Research by Gustafson (1995) revealed three organizational identity categories shared by a majority of the respondents, although two of these may have been biased upward because they were related to elements used in the instrument. Gustafson (1995) offered a preliminary classification of organizational identity attributes consisting of a limited number of intangible identity attributes that address “why and how things are done” and many more specific substantive identity attributes that deal with “what things are done” (p. 180).

Morgan (1997) stated that autopoiesis is a useful metaphor when thinking about how to achieve change in a social system. According to this biological model of a living system (Kickert, 1993), created by Humberto Maturana and Francisco Varela, relationships with the environment are structured to maintain identity. Rather than adapting to the environment, the autopoietic organization sees the environment as a projection of itself; therefore, change can best be understood as an evolution of self-identity. The system must reorganize its perspective to the environment to align its actions with its essence.

Without understanding the underlying assumptions (Schein, 1990) that are the essence of the organization and the core of the culture, organizational change will be met with resistance and difficulty. As Schein explained, “As individuals do not easily give up the elements of their identity . . . so groups do not easily give up some of their basic underlying assumptions” (p. 116).

But what are the elements of identity? It appears that scholars possess a variety of perspectives on how they define the concept. There are disagreements about the definition of identity (Barney et al., 1998), the enduring nature of identity within a context of change (Gioia & Thomas, 1996), and the need to discuss dimensions of identity (Barney et al., 1998). This lack of agreement gives need to build theory to offer greater precision in clarifying the fundamentals of this construct.

With these theoretical issues as a frame, the following focus questions guided this study: (a) What organizational attributes constitute organizational identity, based on the Albert and Whetten (1985) definition? and (b) How does an organization sustain its very essence when undergoing change? The focus of this research was on the content of identity and how organizational change can take place without altering members’ perceptions of what is central, distinctive, and enduring about their organization.

Method

Using an inductive and emergent process, this qualitative case study provided an opportunity to uncover insiders’ perceptions of organizational identity within the context of a merger experience. The identity definition by Albert and Whetten (1985) guided this study’s research design. The case

offered a unique setting because the organization used a merger to transform its image in order to remove the stigma attached to its name.

Context of the Study

The setting for this research was a company that we labeled Company A. Company A was a public company in the business of commercial air transportation, which offered low-fare passenger air service. Company A was extremely profitable and growing until its accident. The crash, which the study's participants referred to as "the accident," not only resulted in the loss of all lives on board but also led to extensive negative media coverage. The accident was followed by a massive reduction in service and then a 15-week shutdown and furlough of employees. After scheduled service resumed, losses continued to accumulate in spite of efforts to attract customers back to the company. Just 14 months after the accident and with continuing declines in profits, the company announced a merger. This holding company merger with the parent of another small airline was specifically targeted as the best vehicle for transforming the company's image that had been damaged because of the intense and unrelenting negative media exposure since the accident. Although this change was defined as a merger, Company A was the dominant player in the deal, with more than 4 times the number of employees, more than 3 times the sales, and 3 times the fleet of aircraft. This was viewed as a necessary change to keep the company in business. The local newspapers described the merger as a "marriage of convenience" because Company A needed a fresh image and the company it was merging with needed cash. Company A was forced to lose its name because of the tarnished image attached to it. This change was significant in that as the premerger advertising of Company A indicated, "Our name says it all!" Even 2 months prior to the official merger, the company enacted the name change. The new merged company extensively publicized many of the changes through its advertising and marketing; in fact, the new marketing phrase was "It's something else." Data collection began 2 months after the merger was announced and was concluded 3 months after the merger went into effect, totaling a 6-month period.

Participants and Interview Protocol

A semistructured interview process was employed by the study's lead author to conduct 52 interviews with company employees. The study's focus questions framed the interview guide. The questions were derived from the three major dimensions in the identity definition (Albert & Whetten, 1985): central character, distinctiveness, and temporal continuity.

A broad question asking for words to describe the organization initiated the questions used in the interview. This was followed by questions that asked informants what was the central character or essence of this airline and then what was distinctive about this airline that distinguished it from others with which it may be compared. Of those attributes described as either central or distinctive, informants were then asked whether each of the attributes had been and continued to be enduring to the airline. For each of the three dimensions—central character, distinctiveness, and temporal continuity—questions were also asked using synonyms for each dimension to ensure reliability in the informants' responses. For all attribute responses, informants were asked for examples of what they meant by the attribute. Members were asked to describe the changes that were taking place in their organization and the impact of those changes on their perceptions of what was central, distinctive, and enduring to the organization.

A senior officer at Company A served as the study's key "gatekeeper" (Bogdan & Biklen, 1992, p. 81), providing access to the company to conduct the study. This individual had knowledge of all aspects of the company and quickly introduced the lead author to the managers in the various departments. These managers who served as the key informants (Spradley, 1979) for their areas helped schedule the employee interviews and made recommendations for opportunities for observations.

Interview procedures consisted of three rounds of employee interviews. The first round ($n = 22$) took place after the merger announcement but before the name change and merger; the second round ($n = 15$) took place after the name change but before the merger was official. The third round ($n = 15$) took place after the merger. All interviewees in the first two rounds were chosen based on their job duty and employment that dated prior to the accident. Following the framework of purposeful sampling (Patton, 1990), the employment date was important because of the enduring nature of identity, based on the identity definition. For employees to assess whether attributes were enduring, they needed to have experience with the company over a period of time. Various functional groups in the organization—pilots, in-flight, maintenance, and reservations—were fairly equally represented. The largest personnel group was customer service ($n = 14$) because that category consisted of several subgroups: ticketing, gate, baggage, ramp, transfer, and operations employees. During the final round, criteria for the sample were expanded to include employees who were new (6 months or less in employment) to the company to determine if there was a significant difference in the perceptions of new employees. In this final round, interviews were conducted to revisit and focus on patterns that emerged in the first two rounds. Ten of these interviews were with employees included in the initial rounds of interviews, 2 from each functional area.

Triangulation and Rigor

Triangulation occurred through the use of multiple and different sources and methods (Denzin, 1970). Examples of data from interviews, observations, and document analysis are indicated in the charts in the appendices of this article. In addition to the 52 interviews, there were 21 hours of observations of employee activities, including reservations, gate activities, ticketing, baggage service, and in-flight open house. Another form of triangulation consisted of reviewing company-produced materials, such as annual reports, press releases, brochures, promotions, advertisements, and flight-related documentation. In addition, numerous articles from local and national newspapers and magazines were also examined. Observation (Spradley, 1980) and document review protocols (Merriam, 1998) were followed. Additional rigor was established through prolonged engagement as the data collection was spread over 6 months, totaling 85 hours in the field. All data from the first two rounds of interviews were transcribed and verified for accuracy with the person interviewed.

Member checks were conducted for confirmation of categorical development. Participants in the final round of interviews were asked for feedback on the classification of content, emerging patterns, and interpretations.

Findings

Categorical Development and Classification of Data

In response to the interview questions, observations, and documentation, certain clusters of data emerged. These clusters of informant- and organization-generated data consisted of two main categories and five subcategories. The five subcategories emerged out of the clustering of attributes based on the nature of the content and the presence of the identity dimensions. These five subcategories then were clustered into two main categories: core attributes, which satisfied the organizational identity definition, and application attributes, which did not satisfy the organizational identity definition, based on the Albert and Whetten (1985) criteria.

In the typology of categories that emerged, the first main category, core attributes, included two subcategories, purpose and philosophy, that together as a unit met all of the criteria of the identity definition (see Figure 1). The second main category, application attributes (see Figure 2), included three subcategories, whose content were manifestations of the purpose and philosophy. The three subcategories of application attributes were priorities, practices, and projections. None of the attributes in these three subcategories met the central character criterion of the Albert and Whetten (1985) definition. Members clearly differentiated between those aspects that they believed were the central essence of the organization that defined

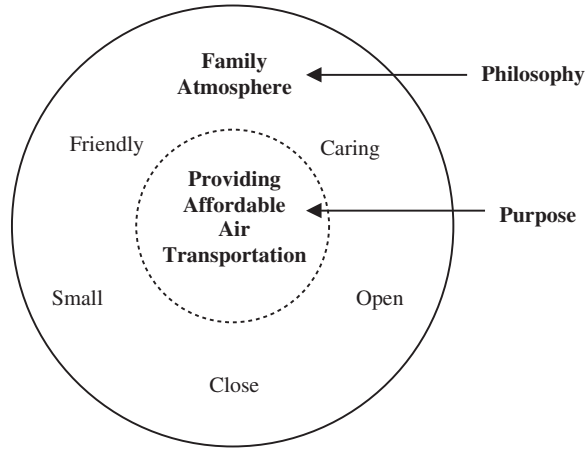


FIGURE 1: Core Attributes for Company A That Constitute Organizational Identity

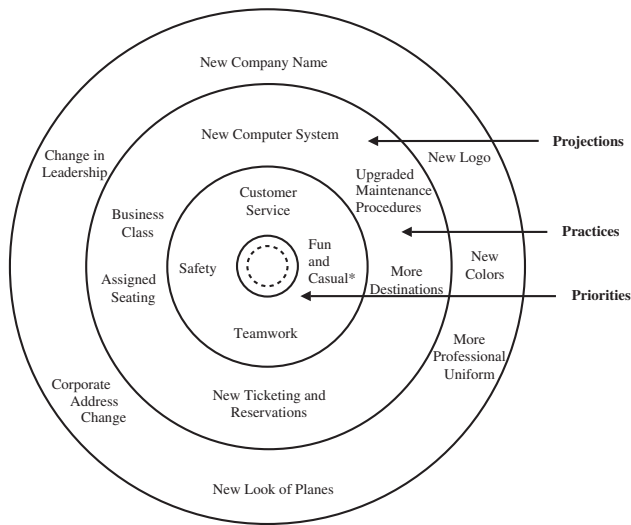


FIGURE 2: Application Attributes for Company A That Do Not Constitute Organizational Identity

Note: *Indicates the priority lost.

its very nature—core attributes—from those attributes that supported that essence and therefore were not inherently the identity—the application attributes. It was in the application attributes that the merger caused significant and immediate change. Therefore, application attributes also did not meet the enduring criterion. Some application attributes were described as distinctive, but with the merger, many of these distinctive features and sym-

bols did not endure. Members did not feel that the essence of the organization was in jeopardy as long as the purpose and philosophy were sustained and as long as any changes in application attributes were viewed as relatively consistent with those core attributes.

The names of the subcategories were generated from the language used by informants in describing the organization. This section will present definitions and examples of each attribute category.

Core Attributes of Organizational Identity

The findings revealed that a small number of attributes constitute organizational identity. The data suggested that the first main category of core attributes was composed of two subcategories: purpose and philosophy. Informants defined the purpose as the reason why it was important for the organization to exist and the philosophy as the source for how members do their work in a distinctive way. Together, the purpose and philosophy met the three organizational identity criteria: central character, distinctiveness, and temporal continuity.

Purpose. Greater than two thirds of the study's interviewees identified the purpose of Company A—to provide affordable air transportation—as what was central and enduring to their organization. All members in the third round of interviews confirmed this view. An interviewee said, “They started the company with that in mind, low-cost transportation out of City A, and that’s been the theme all the way through from the very beginning and still is.” The participants explained that Company A was created for this special “affordable transportation” niche, and even with the merger, this focus was never diminished. The notion of affordability was linked to the need to bring fairness to a transportation system that promoted inequality. Members stated, for example, that it was not right to demand high prices for the privilege of visiting a relative or spending vacation time with one’s family. Fundamentally, members described their company as one that was taking a stand, in spite of the bigger competition, so that it could help families who previously could not afford to fly. This company was also doing what was right, because prices for air transportation were unnecessarily high for all travelers. Even with the addition of business travelers as a target customer, the central purpose since the company’s inception, of providing affordable air transportation, was not altered. This patriotic cause was consistently described in interviews, speeches, and through printed materials as an attribute of the organization that had been central and enduring to who they were as an organization. Throughout the premerger and postmerger period, company leaders consistently delivered this message to the public through significant marketing and advertising activities. The press regularly shared the same broad message when it described the company, although it often used a negative slant in portraying this image.

Philosophy. The philosophy, a subcategory within the main category of core attributes, of Company A that served as the source and framework for how members did their work in a distinctive way was their family philosophy. This family atmosphere was characterized as being friendly, caring, open, close, and small. A majority of the members portrayed the family feeling in terms of their closeness and feeling of genuinely knowing people and sharing special friendships. They described Company A as having an open feeling, even with 2,000 employees. They genuinely had the comfort of knowing almost everyone at all levels of the organization. When individuals met while walking down the hall or the concourse, they regularly hugged each other and spoke using first names. An interviewee made the following remark: "When I came to work here, it was like welcome home. It was almost like going to my new family. It's almost like I was adopted." So many said, "It feels like family." One of the signs at the company open house for prospective employees read, "We are all one family under the same sky." The open house experience promoted and modeled the friendly, caring style. With this nurturing atmosphere, members expressed a trust in management; they felt that all doors were open and that their voices were valued. These employees were a family of workers who cared about each other.

Members considered this family philosophy as the source for the distinctive way they did their work. Members believed that they offered a humanitarian service to other families in a caring manner that was quite distinctive in the industry. In comparing their company's philosophy to that of other airlines, this family emphasis was quite unique. The family philosophy, which was described as central and enduring to the organization, was the distinctive way that their purpose was delivered.

This family feeling was extremely strong prior to and at the time of the name change, but after the merger, although the unique family atmosphere was still present, there were increased concerns as to whether it would continue. This anxiety was the product of significant organizational change that included moving corporate headquarters to a different city, greater formality in corporate structure, and an increase in staff. To support the merger, members accepted the need to alter processes and procedures; however, they were unwilling to sacrifice their family spirit. Members explained that they could deal with change as long as the change did not threaten their family philosophy. The family philosophy along with their purpose defined the distinctive essence of their organization and the core attributes that members were personally connected and devoted to.

Core Attributes Applied

In the typology of categories that emerged from the data, the second main category, labeled application attributes, included three subcategories: priorities, practices, and projections. These application attributes do not constitute organizational identity. Application attributes are not the central char-

acter of the organization; instead, they are manifestations of organizational identity. Application attributes may be stable or variable; a change in priorities, practices, or projections does not have to constitute a change in what members perceive as being the central, distinctive, and enduring essence of the organization. Some application attributes may be perceived as distinctive, but any distinctive feature is not central to the nature of that organization. Each subcategory of application attributes has its own content theme, and the enduring nature of each subcategory varies as one moves from the central core.

Application attributes: Priorities. The data indicated that Company A had priorities that were extremely important to the organization, although they were not organizational identity. These key values—customer service, safety, teamwork, and fun and casual—were manifestations of the purpose and philosophy.

The attribute of providing special customer service was described as a priority and key value of the company by a majority of the interviewees. The friendly atmosphere, rooted so strongly among the employees in how they treated each other, was naturally extended to their customers. An interviewee said when describing the importance of the customer, “We’re pretty close knit. We have flight attendants and customer service agents that naturally exude that exuberance toward the customer.” Employees eagerly shared examples of situations where they went out of their way to deliver that special service. Insiders clearly connected the root of that superior customer service to the feelings that they shared for each other. This exceptional customer service was not in and of itself the central character of the organization; rather, it was a manifestation of their family philosophy to how they did their work. Members believed that the customer service priority had been an enduring value of this organization. With the merger, brochures and advertisements focused on new customer service features, although many interviewees mentioned that poor retention, lower quality new hires, and insufficient training might put this special customer service in jeopardy. To most in the organization, customer service was a clear value that guided how they did their work.

Another aspect of applying the family philosophy was the priority placed on a safe flight. Safety was a key value of Company A, as would be expected in the airline industry. But as many explained, prior to the accident, the public was so excited about their services and prices that issues of safety were downplayed and assumed by the public. It was definitely not a distinctive feature. The increased emphasis on safety was a more recent focus since the accident. Any new safety problem could cause the media to mount a campaign that could severely damage the fragile company. As one member stated, “There’s so many checks and balances now it’s a wonder we get any of them (planes) out.” This priority on safety was a key value that guided how members expressed their family philosophy with each other and their

customers at work. But it was not viewed as a central or enduring feature of the organization. When members were directly asked if safety should be a component of the identity, members consistently responded that they did not believe it merited that central nature.

Employees often described a genuine team effort as another priority or key value of Company A. Numerous situations were given of helping others in their work, without being asked. All groups in the organization noted the importance of teamwork. They described their family bonding as a kind of connectedness that made the priority of teamwork an automatic response and therefore not central, in and of itself, but rather a manifestation of the family philosophy. An interviewee said, "Everybody is pulling the rope in the same direction. There is nobody that ever says that's not my job." One of the questions in their hiring process asked prospective employees to describe when they worked in a group effort or as a team. Any distinctiveness in their team effort was described as a natural application of their family philosophy to their work. Teamwork had been an enduring value that was aligned with their family philosophy.

Fun and casual had been a priority of this organization. Employees viewed Company A as a place where work should be fun. Fun was so important to this organization that it was even a part of their slogan. This fun approach to travel with a casual, laid-back style was carried out predominantly through their casual dress (e.g., shorts, khakis, golf shirts, and sneakers) and the games that they played in the gate area and on flights. Members thought that being fun was important because it helped first-time flyers be more relaxed on their flight.

With the accident, the perception of fun and casual was no longer considered a priority; rather, it was a liability. They would not be able to stay in business if they maintained that casual image. More formal company dress standards for managers had been implemented, fewer games were played with customers, and more traditional employee uniforms were planned. As one interviewee remarked, "Now you don't play games with the customers on the airplane like we use to. The reason they've done that is to get a more professional image." This loss of a fun and casual focus was a necessary change to enhance their image as a safe airline. Members saw this loss as a necessary change in priorities that they could live with if it supported the company's survival.

Fun and casual was a key value, but it was an application of the family philosophy that could not endure. With the loss of fun and casual, the organization was still sufficiently intact according to its members. The loss of the fun and casual priority did not fundamentally change the central, distinctive, and enduring essence of the organization as they viewed it.

Application attributes: Practices. The second subcategory of application attributes was practices. Outside of the priorities were practices that fluctuated

with the needs of the organization in its attempts to be competitive. These practices included new business procedures, products, and services that put purpose, philosophy, and priorities into action. Some of the new practices instituted were upgraded maintenance procedures, increased safety standards, and a new computer system as well as new features such as assigned seating, ticketing, business class, and expanded destinations. The focus of their business in the past was the leisure traveler; but with the name change and upcoming merger, a new customer base was added: the businessperson who traveled more frequently. This was an important, new revenue stream that enabled them to stay in business. This new customer base was a strategic change that did not alter the content of the identity. As one interviewee stated, "We are constantly reinventing."

Changes in practices were ongoing; they began immediately with the merger announcement and continued throughout the time of the research. Practices were less stable than the purpose, philosophy, and priorities that they supported. In most cases, these practices were not seen as central or enduring to the organization, and many of the features that had been considered distinctive were terminated in attempts to appear more like the traditional airlines.

Application attributes: Projections. The third subcategory of application attributes was projections. Outside of practices were the projections or images of the organization that were a reflection of the organization to the public. The most dramatic and obvious changes were in how the company altered its projections to the public. Projected images included the logo, company name, colors, look of the airplanes, and the image of leadership. In particular, the name and logo were symbols of the company that served as images of what the company represented. Changes in these projections were enacted before the merger was even official because they were considered a liability for the organization. These changes were critical for survival because the media had so successfully transformed the company name and image from one of fun and friendly travel to one of a horrific death. Company A used the merger as an opportunity to eradicate this image of death and replace it with the look of something else that was experienced, competent, and professional—a new airline. For many members, it was very painful to lose the logo. It was described as "the death of a best friend" and like "you are losing part of a family." On the day of the name change, one employee showed the face of her watch with a picture of the logo on it. Even though employees were not supposed to be wearing the old logo, it was hard for some to give it up. But many believed, as expressed by an employee, "The image is changed, but the guts are still the same." As another member said, "A lot of people are sentimental in seeing the logo leave, but it's like new life. It is a whole different image, a promise of more good things. We needed a drastic image change." Also, after the merger, corporate headquarters was moved to another state. These changes were quite significant from the perspective of public image and required an emotional detachment by Company A employees. But members

believed that what really mattered—the core attributes of organizational identity—would be preserved. The projected images were not central to who they were; therefore, they did not have to endure. Even with these changes, members still considered the essence of the organization intact.

Discussion

Organizational Identity Theory

Based on the Albert and Whetten (1985) identity definition, this research contributes to the development of organizational identity theory by providing new insights that both alter and extend current theory. Given limited research in this area, this study contributes to the discovery of propositions that can serve as a foundation for future research.

Content of organizational identity. This research supports previous study in suggesting that members of an organization do share a limited number of organizational identity attributes (Dutton & Dukerich, 1991; Gustafson, 1995). This finding supports Gustafson's (1995) initial test of the veracity of collective identity and provides the first examination of the presence of collective identity in a merger environment. This research also presents the first systematic investigation that has identified the core attributes—the purpose and the philosophy of the organization—as organizational identity, adhering to the criteria of the Albert and Whetten (1985) definition.

Prior efforts to understand the meaning of “the essence of the organization” (Albert & Whetten, 1985, p. 265) often included values or practices as organizational identity rather than honing in on the attributes that were truly central, differentiating, and enduring that impacted everything else. Therefore, within the frame of the Albert and Whetten (1985) definition, we suggest the following proposition:

Proposition 1: Organizational identity consists of the organization's purpose, the rationale for why it is important for the organization to exist, and the philosophy, the source for how members do their work in a distinctive way.

The purpose of an organization goes beyond explaining why the organization exists. Instead, the purpose defines why the organization's existence is important and therefore reveals the real meaning underlying work at the organization. Purpose provides the opportunity for emotional connection between work and the individual. It can be the vehicle for making a personal contribution to a cause and having an impact that is greater than what one can singularly achieve. Such connectedness nurtures success as a by-product of action because of the collective intensity of individual commitment to the cause. The purpose statement is typically brief in length while broad in scope, yielding elasticity and therefore

durability because of the capacity to adapt over time while remaining constant in its central focus. The purpose alone is not necessarily unique but combined with the philosophy yields the distinctive and enduring essence of organizational identity. Where the purpose provides the foundation for the organization's existence, the philosophy provides the framework for how that foundation is delivered. Philosophy refers to the organizing principle that is the root for how business is conducted. Philosophy is the central character of the organization. Members believe that this philosophy is the source of the organization's uniqueness, and this attribute along with the purpose is what loyal members are typically connected to. It is the feature that members believe sets the organization apart from their competitors. Philosophy intertwined with the purpose is the basis for everything else. They are the anchors that center an organization and the filters through which all action must be screened. Together, the purpose and philosophy constitute the identity of the organization creating an organizational mind-set that cannot be significantly altered without severely affecting what the organization is and how members relate to it.

This definition of organizational identity is similar to one aspect of the definition by Collins and Porras (1997, p. 73) of core ideology (core values and purpose). Philosophy is defined differently in this research from how core values are presented in the work of Collins and Porras. Organizational identity, based on the research of Company A, is more precise than an organizational creed or statements of objectives and values. Organizational identity is the true essence and source from which other organizational attributes emerge. Organizational identity is the unique product of circumstances in an organization's history. The findings of this study are consistent with the viewpoints expressed by Collins and Porras (1997) that this core is something that naturally emerges from within the organization, strongly influenced by the nature of its founders, not something that can be copied from others.

The concept of purpose is also different from a mission statement that typically includes the organization's products or services and even its customers as a component. Based on this research, even when leadership radically expanded Company A's customer base, members did not interpret this change as an alteration in what was truly the essence of their organization. Instead, it was just a change in the application of that purpose that provided opportunity for growth and increased profits. Organizations must also be open to changes in products and services that ensure flexibility and competitiveness. It is essential that an organization be rooted to a purpose that allows opportunity rather than limits perspective or options.

Enduring nature of organizational identity. There has been some controversy as to whether the core attributes of organizational identity can really be enduring because change is required to be competitive (Gioia, Schultz, & Corley, 2000; Gioia & Thomas, 1996). Albert and Whetten (1985) considered the temporal criterion to be essential to the definition of organizational identity. Company A

was experiencing extensive change; some key facets were eliminated, some were in transition, and the durability of others was in question.

The findings of this study indicate that if one or both of the components of organizational identity significantly change, then this condition would constitute the end of the organization, as members knew it. The organization might still exist, but its essence would be dramatically altered in the minds and hearts of its members. We suggest the following proposition.

Proposition 2: On an organizational level, when a majority of employees perceive the purpose and/or philosophy as being different from what had earlier been perceived, then the organization will have a new identity.

An organization that redefines itself with a new purpose that is significantly different from its previous reason for being in business constitutes an organizational identity change. An organization that eliminates or significantly alters the framework for how members do that business, their distinctive philosophy, constitutes an organizational identity change. Any modification that does not alter members' perceptions of the purpose or the philosophy does not constitute organizational identity change. The extensiveness of an alteration to organizational identity is best judged by the members rather than by outsiders.

For Company A, the organization had lost its fun and casual past. Even with these significant changes, insiders did not feel that the central essence of the organization had changed. But at the postmerger interviews, there was concern about the loss of the family philosophy. This change was having a significant impact on members. If the organization was to be redefined as something significantly different from a family according to the perceptions of a majority of its members, then we suggest that the organization's identity would be altered. If any component of organizational identity is changed, either purpose or philosophy, then there is a funnel effect that can potentially affect all aspects of the organization. Similarly, if there are sufficient changes in priorities, practices, and projections that are inconsistent with the purpose and philosophy, then the stability of the purpose and philosophy may be in question. The application attributes are like "walking the talk." If organizational actions are inconsistent with what members of that organization perceive the organization to be, then the health of the organization will be in question and the stated purpose and philosophy will be in jeopardy.

Based on this research, we recognize that many attributes of an organization can be eliminated or modified to suit the survival needs of the organization. However, it is not organizational identity that is fluid; rather, it is the application attributes that are fluid. The singular transformation of any aspect of one of the three application attribute subcategories does not change the core attributes of the organization in the minds of its members; instead, they are applications of organizational identity. Application attributes consist of priorities, practices, and projections. Thus, we offer the following proposition:

Proposition 3: Application attributes may require modification and change for long-term sustainability.

Priorities are the values that guide how the purpose and distinctive philosophy are delivered. Priorities emerge from organizational identity and set the standards for the organization's practices as well as how it projects itself to the public. For Company A, the priorities were customer service, safety, and teamwork. Priorities are relatively long-lasting application attributes, but they can change to promote organizational sustainability. Such a change in priorities, such as the loss of fun and casual for Company A, will have an impact on the organization, but it does not have to alter organizational identity.

Practices are internal systems, procedures, and processes as well as the company's features, products, services, customers, and suppliers. Company A made significant changes in its practices to survive. These elements of the organization must be adaptable in order to meet the demands required for sustainability. They are not core attributes, and their durability is dependent on organizational direction and environmental challenges. Some practices may be distinctive, offering an organization its competitive features, but these distinctive practices are not central to the essential character of the organization.

Projections are the images of the organization that are projected to the public. These attributes include symbols such as the company name and logo as well as the images that are portrayed by the offices, marketing activities, and even by the individual chosen as the organization's leader. Projections communicate clear messages of what the organization wants outsiders to believe about their organization. Although some projections may have an emotional connection for the members, they are symbolic of organizational identity and are open to change when necessary to achieve long-term sustainability. Projections are reflections of the core attributes and do not constitute aspects that are inherently central and enduring to the organization.

Structure of core attributes and application attributes. Gustafson (1995) offered a preliminary classification of organizational identity attributes for organizations in hypercompetitive environments. Based on this classification scheme, there are limited intangible and many specific substantive identity attributes where not all identity components are central, distinctive, and enduring, which differs from the Albert and Whetten (1985) definition.

Research on Company A indicates a different structure for organizational identity (see Figure 3). First of all, the data indicate that there is a structure to organizational attributes consisting of the core attributes and application attributes. We suggest the following proposition:

Proposition 4: There is a structure to organizational attributes with the core attributes of organizational identity located at the center of the structure and application attributes located outside of the core attributes.

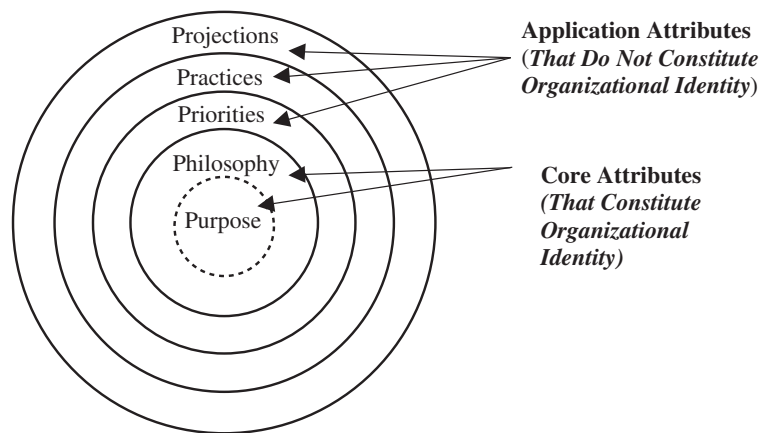


FIGURE 3: Structure of Organizational Attributes

At the center of the structure of organizational attributes is organizational identity. The structure of organizational identity consists of the purpose and philosophy of the organization. The purpose is placed most central in the two-part identity structure because informants described it as the foundation and central focus for all that they do. Purpose defines “why” it is important that the organization exists. Without purpose, there is nothing for behaviors or actions to anchor to. In interviews, observations, and documentation, this purpose was expressed as the enduring and essential reason for their existence. The second component of the identity structure—the philosophy—was placed just outside of, but as a companion with, the purpose. This structure is based on the perspective that the purpose is the foundation for the organization defining why they do their work and the philosophy is the framework for how members do that work. Therefore, the foundation—the cause that justifies the existence of the organization—naturally precedes how that cause is distinctively expressed. The philosophy is the distinctive and enduring central character that frames how the purpose is delivered. These two components, purpose and philosophy, together as a unit define that which is central, distinctive, and enduring to an organization.

In the structure of organizational attributes, outside of the core attributes defined as organizational identity, are the application attributes. The priorities, practices, and projections are typically manifestations of the philosophy in an organization’s efforts to achieve its purpose. Application attributes do not meet all three criteria of the central, distinctive, and enduring dimensions. Application attributes guide, put into practice, or reflect identity, but they are not the content of that identity. Therefore, application attributes are not central in nature, and their capacity to endure depends on the needs of the organization.

In the structure of organizational attributes, priorities are the application attributes that are located closest to the core attributes of organizational identity. Priorities tend to be the most enduring of the application attributes because they are the values that are adopted to bring the core attributes into life. Because priorities set the standards for practices and image projections, any changes in priorities can have significant impact on the organization. Those application attributes that are practices are located outside the priorities and support the implementation of the purpose, philosophy, and priorities. It is important that organizations have flexibility in these practices to ensure competitiveness. Although adjustments are required when implementing practice changes, such alterations are part of organizational life, especially in a constantly changing world. Those attributes that are the images or projections of the organization are application attributes that are most visible to outsiders and the greatest distance from the core attributes of organizational identity. Being a reflection of the central and distinctive nature of the organization, projections often have a lot of emotional attachment for insiders because they symbolize the core attributes of the organization. Projections are also significant from an image perspective to the public, but in and of themselves, they do not constitute the guts of the organization. These reflections of the organization are often the least enduring of all attributes because management can easily manipulate them to influence public perception. Based on this study's findings, those application attributes located further from the core attributes of organizational identity tend to be easier to change than those attributes located closer to the core attributes. For example, it is easier to change a practice than a priority. The only caution is that when changing priorities, practices, or projections, it is important to initiate changes that are consistent and aligned with the purpose and philosophy, if the purpose and philosophy are to be preserved. Otherwise, the organization's identity will eventually be altered if sufficient aspects of the organization's application attributes are changed in ways that are inconsistent with that identity. Organizations must be clear about their purpose and philosophy, and if they choose to maintain them, they must be vigilant about aligning their priorities, practices, and projections to that identity. An organization achieves this alignment by holding values that support the core attributes of organizational identity, having practices that work to put that identity into action, and reflecting images that give outsiders a message that is consistent with the identity.

The labels of intangible and substantive identity offered by Gustafson (1995) to define the structure of organizational identity attributes do not appropriately differentiate identity from that which is not identity. According to Gustafson, substantive identity is the label for those things that could be changed if needed to remain competitive. Based on the research of Company A, organizational identity attributes are central and distinctive in the eyes of the members and should include only those attributes that are endur-

ing, based on the Albert and Whetten (1985) definition. The core attributes of organizational identity are both intangible and substantive. Everything else is a manifestation, application, or reflection of that identity. Over time, new identities do not emerge; rather, new application attributes evolve, as different conditions require different behaviors. These application attributes do not constitute what Albert and Whetten have suggested as being the essence of the organization.

Implications and Limitations

This research offers important implications for organizations, especially when undergoing change. This study's data suggest that the sustainability of organizational identity is critical to the survival of the organization. Likewise, an understanding of what organizational attributes constitute identity and must be sustained in contrast to those that may be altered is valuable in maintaining viability during times of transition as in a merger.

The propositions in this study not only address the limited research in the area of organizational identity but also serve as a foundation for further study. To extend organizational identity theory, future research could continue to examine the content of organizational identity and the content and structure of organizational attributes. Is organizational identity the purpose and philosophy as this research has indicated? If either of those elements is significantly altered, how does it affect an organization? And is modification and change in application attributes required for long-term sustainability? Further study of organizations undergoing change can shed light in these areas.

Managing organizational identity is a critical task, and as change agents, HRD professionals have a key role in this process. Regardless of the type of change event, be it a change in leadership or the introduction of a new set of procedures, or be it a merger as was the case in this study, the effects of the change must be anticipated prior to implementing the change. In the specific case of a merger, all aspects of the change must be planned for prior to the announcement. With HRD guidance, company leaders must ascertain the identity of their present organization as well as their new partner and the identity for the merged organization. If change in the organizational purpose and philosophy is expected, then members must have the opportunity to evaluate their desire to fit with the new identity. There must be a cognizant effort to filter changes through the core attributes of organization identity if the identity is to be preserved. Knowing, for example, that early changes in priorities, practices, and projections will not alter the company's core attributes of organizational identity can reduce anxiety and a premature and perhaps unnecessary sense of organizational identity loss. This process of change requires the leadership and knowledge base of someone who understands the importance of preserving the central, distinctive, and enduring

attributes of an organization through aligned action to that central core. The HRD professional has a critical role to play in enhancing the capacity of an organization to not only survive change but also thrive on it. The propositions and models that emerged from this research can provide the tools to guide the process.

If additional time had permitted, it would have been helpful to see how issues of organizational identity would continue to unfold. Leadership had announced only statements about the continuation of the purpose of Company A. If the philosophy were later altered, as some people feared, it would be interesting to see how this might affect the organization and the employees in it. Second, only members of Company A were interviewed for this research. Attitudes of the merged organization would undoubtedly add complexity to the situation. How this factor further complicates issues related to organizational identity is unknown to us at this time. In addition, only members at the major hub location in City A were interviewed. Subidentities within the organization could also be another area for research. With larger numbers of interviewees from each functional group, the data might have revealed subidentity differences in perceptions. By expanding the interview process to include even larger numbers, it might better expose variations within the organization. Finally, this research is one in-depth case study. The transferability of this research is limited because understandings have been drawn from just this company's experience and our review of the literature. Yet, we believe that the propositions that emerged from the data offer rich opportunities for future study.

Appendix A

Examples of Data Grouped by Core Attribute: Premerger/ Pre-Name Change, Premerger/Post-Name Change, and Postmerger

Purpose: Affordable Air Transportation

Premerger/Pre-Name Change

- They started the company with that in mind, low-cost transportation out of City A, and that's been the theme all the way through from the very beginning and still is. (I)
- It lets grandmothers go visit and lets little kids go visit people that ordinarily they wouldn't be able to do. (I)
- Staff consistently talked about their mission to provide low fares for customers. (O)
- Low fares everyday, everywhere we fly. (D—advertisement)

Premerger/Post-Name Change

- That's the basis of the business—provide a service at a price that has been and hopefully will continue to be considerably less than what most of the competitors can deal with. (I)

- We're still promoting affordable air transportation, but we are trying to give the consumer some of those amenities that they want. (I)
- Continuing to provide affordable fares. (O—comments made at a press conference for the name change)
- We won't stop thinking of ways to make low-fare air travel a more enjoyable experience. (D—company brochure)

Postmerger

- We still provide affordable travel service. (I)
- Affordable air travel is at our core. (I)
- At Company A, the "a" has always stood for affordable. (D—company press release)

Philosophy: Family Atmosphere

Premerger/Pre-Name Change

- There was nothing (at another airline) to compare with the family atmosphere that we've had here. It is very unique here. (I)
- We all just take care of each other. It really is like one big, happy family. (I)
- I've been here 2½ years, and we're right around 2,000 employees now. I can safely say that around 700 or 800 people, I know their names. I mean that's incredible, and it wouldn't happen at other airlines. (I)
- Observed and experienced a warm and open atmosphere among employees where people are friendly, speaking to each other using first names when walking down the halls, and often hugging each other upon greeting. (O)
- Posters filled with photos on the wall of gatherings: picnics, birthday parties, Halloween parties, paint parties, and Christmas parties. Posters were labeled the "Company A Family." (D—wall posters)

Premerger/Post-Name Change

- We have a very caring environment and can get together and shoot the breeze and talk about issues and things like that. (I)
- You can walk into his (CEO's) office as easy as you can walk in the supervisor's office. It's easy to work here. (I)
- It's friendly out here. Even after work, people still hang around each other. (I)
- We are all one family under the same sky. (D—sign on the wall of the area for in-flight open house)

Postmerger

- I think if we continue to grow, it probably will change. But it's still there now. (I)
- Losing a little of the family feel. But it's still more a family than the others (airlines). (I)
- Right now with the merger, there are faces we have not seen before. Before the merger at corporate, I knew everybody's face. Now, (with the move), I didn't know everybody's face. Everybody was still very friendly. But there were a lot of unfamiliar faces. This was unusual. It feels more like a big company. (I)

Note: Data collection methods: The data were collected via interviews (I), observation (O), and document analysis (D).

Appendix B
Examples of Data Illustrating Priorities: Premerger/
Pre-Name Change, Premerger/Post-Name Change, and Postmerger

Priority: Customer Service

Premerger/Pre-Name Change

- We want each customer to feel like they've been treated with personal service, that they were the only person on the flight. (I)
- I volunteered to take a person (home) who didn't have the money for taxi fare. (I)
- One night this lady came in and had misconnected, and she had a baby. They had sent her to a hotel. She couldn't get her bags, and she didn't have a jacket for this baby. I gave her my coat. (I)
- Observed gate agent thoughtfully discussing the best seating for a customer. (O)

Premerger/Post-Name Change

- We are still committed to the personable customer service. So many people have bad service on bigger airlines. We're small enough to where we can give quality customer service. (I)
- Observed CEO at name change press conference say that his vision is to provide better and better service. (O)

Postmerger

- Our customer service is still special. They go out of their way. (I)
- We need more experienced and trained staff to be able to continue our customer service. (I)
- We need to do more customer service training. The gate agents need more customer service skills. (I)

Priority: Safety

Premerger/Pre-Name Change

- Everything about this company now is all contingent on the accident. Unfortunately that's our label. We can't make a single mistake. (I)
- Safety is the number one issue here right now. (I)
- Safety banners, safety signs, and safety newsletters were visible throughout all parts of this organization. (O)
- Company A operates under a special FAA consent order governing its restart following a 15-week grounding last summer for assorted safety violations uncovered after the crash. (D—local newspaper)

Premerger/Postname Change

- A lot of maintenance practices have changed. We're more safety oriented. (I)
- All I can see every single day is the airplane safe and as reliable a piece of equipment as it can be. (I)
- The safety of an airline starts at the top. (D—company brochure)

Postmerger

- Safety was not a special issue in the past. It's important now. (I)
- Now there is a Director of Safety and a safety program; systems are in place. (I)

Priority: Teamwork

Premerger/Pre-Name Change

- I pretty much do anything else they want me to. (I)
- We are a team effort, not a lot of upper management; we work as a team. (I)
- We cross-train. We work different areas. Everybody's equal. (I)
- I've been walking by and saw an agent had a lot of bags at the gate. I was on my way out the door. I missed my bus to go help her take bags down. (I)
- They're (the pilots) doing their paperwork, and if they have time, they start crossing seat belts. (I)
- Signs in offices labeled teamwork. (D)

Premerger/Post-Name Change

- If somebody needs a little help, someone else is there to help them. (I)
- People work well as a team. (I)
- Observed people helping each other do their jobs. (O)

Postmerger

- Teamwork is still strong here, mainly because of the team focus of those who came from Company E. (I)
- When we do training, the whole class is a team. We promote them working together. (I)

Priority: Fun and Casual

Premerger/Pre-Name Change

- It's a fun airline. We don't have first-class and coach; we have fun class. It's a fun airline. (I)
- It's fun. Oh, anytime anybody has a baby or a birthday or a shower. It's a cake and balloons. All the supervisors come down here. I like that. That means a lot to me personally. (I)
- We have one captain who plays the harmonica. (I)
- Observed the casual dress: shorts, khakis, golf shirts, and sneakers. (O)
- Observed play sets between gates. (O)
- We provide a casual setting and offer a fun, hassle-free experience. (D—quote from CEO in news release)

Premerger/Post-Name Change

- We used to play games. We don't play in the gate area anymore. (I)

Postmerger

- There is less of the games. Casual is definitely being de-emphasized. (I)
- There are fewer jokes. Things are more businesslike and professional. (I)

- It's gone, absolutely. This doesn't mean we don't have fun working with each other. (I)
- Observed new, more formal uniforms. (O)

Note: Data collection methods: The data were collected via interviews (I), observation (O), and document analysis (D).

Appendix C
Examples of Data Illustrating Practices and Projections:
Premerger/Pre-Name Change, Premerger/
Post-Name Change, and Postmerger

Practices

Premerger/Pre-Name Change

- We get a different kind of customer. We get the greyhound crew. I was not prepared for the numbers of people that have never flown before. (I)
- Our niche market is the leisure traveler. The people that wouldn't be able to afford to fly unless the fares are cheaper; and to keep the fare cheaper, you don't have first class on the airplanes or hot meals; you give them good friendly service. (I)

Premerger/Post-Name Change

- New services were introduced at the name change press conference prior to the merger: business class, assigned seating, and ticketing. (O)
- Customers will soon be able to enjoy our new business class cabin, assigned seating on every seat, and access our affordable fares through travel agents. (D—brochure)

Postmerger

- Our agents are not used to the new procedures. (I)
- We need better systems for hiring and training people. (I)

Projections

Premerger/Pre-Name Change

- I would like to see them keep it (the name), but reality is you can't. (I)
- The founder (and CEO) did a great job of saving the company initially. Now he's permanently connected to the crash. So, if you're going to change the name to get away from the crash, you don't put him out front again. (D—comment by industry consultant in local newspaper)

Premerger/Post-Name Change

- Everything's changed on the outside of the airplane, but if you sit on the inside, you can't tell the difference. The same thing is with everybody here. Sure, we wear a different uniform and all that—it's superficial. It's the guts; they're still the same. Only now we have a little more hope because we're not being dragged down by the name. (I)
- A new plane with the new name and logo were unveiled to the press at this name change press conference. (O)

Postmerger

- Corporate headquarters was moved to another city after the merger. (O)
- More formalized uniforms were introduced months after the merger was enacted. (O)

Note: Data collection methods: The data were collected via interviews (I), observation (O), and document analysis (D).

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