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Gail Cheney

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UNDERSTANDING THE FUTURE OF NATIVE VALUES AT AN ALASKA NATIVE
CORPORATION

GAIL CHENEY

A DISSERTATION

Submitted to the Ph.D. in Leadership and Change Program
of Antioch University
in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy

February, 2014

This is to certify that the Dissertation entitled:

UNDERSTANDING THE FUTURE OF NATIVE VALUES AT AN ALASKA NATIVE CORPORATION

prepared by

Gail Cheney

is approved in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Leadership and Change.

Approved by:

Carolyn Kenny, Ph.D., Chair

date

Mitch Kusy, Ph.D., Committee Member

date

Jon Wergin, Ph.D., Committee Member

date

Thomas Thornton, Ph.D., External Reader

date

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Although, I can go further and thank many others, I want to close with my inspiration from my grandparents. From my grandmother to earn an education and from my Grandfather who said, “We walk in two worlds, we must take the best of both.”

Abstract

This dissertation frames the first step on a journey toward understanding the current and future place that Native values have in an Alaska Native Corporation, a context of value conflict, resolution, adaptation, and change. My dissertation strives to answer the question, “What is the future of Native Values at Sealaska?” To carry out this study, I utilized the Ethnographic Futures Research Method (EFR) developed by Dr. Robert Textor. EFR, as a method, asks individuals to envision a pessimistic, optimistic, and probable future along with strategies to move the probable future more toward the optimistic vision. EFR is an innovative and unique way to study Native values at a corporate organizational level. I expected the process to result in a collective vision of what Sealaska could be like in 15 years if Native values are integrated as envisioned based on individual interviews and collective discussion of aggregated interview scenario compilation. However, instead it provides the foundation of that strategic foundation for the future of Sealaska. This research revealed a set of tangible, culturally relevant options that can now be discussed and developed into a focus for the future of Sealaska as well as a proposed process to reach that agreement. The dissertation strives to provide meaningful long-range strategic objectives to weave into the evolutionary strategic plan. This dissertation is accompanied by a MP4 video file that is referred to within the text. The video outlines motivation for author’s selection of the topic. The electronic version of this dissertation is at Ohiolink ETD Center, <http://www.ohiolink.edu/etd>

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Leaving_Values_Outside, MP4, 14,765 kb, 1min 57 sec

Chapter I: Introduction

Chapter I provides a general framework and description of my research project. I describe the purpose of this study and my dissertation question as well as my position as an “insider.” I generally describe any gaps in the research literature on the population, topic, and method employed in this project. Finally, I provide a short description of each chapter of the dissertation.

The Purpose and Importance of Research

The purpose of my dissertation is to understand the future of Native values at Sealaska, an Alaska Native for-profit company federally created under the terms of the Alaska Native Claims Settlement Act of 1971. The importance of this research is threefold: first, to all the current and future recipients of benefit from the Alaska Native corporate structure in Alaska; second, to the academic community; and third, to the overall Alaska Native community as it works toward evolving a long-term vision in which Native values are woven into all aspects of our work, conduct, and community. To begin, I will outline the development of Alaska Native Corporations (ANC) since the passage of the Alaska Native Claims Settlement Act (ANCSA) and paint a picture of the progress that has been made. The description of the unique corporate model of ANCSA corporations is meant to illustrate the value conflict inherent in this structure as well as other important aspects relative to it.

It has been 40 years since the passage of the Alaska Native Claims Settlement Claims Act (ANCSA) in 1971. ANCSA created 12 regional and over 200 for-profit companies, incorporated under Alaska state law. From 1971 to present, the Native Corporations have grown and changed in the context of an ever-changing world. Sealaska, as all other Alaska Native Corporations, was created in order to settle the outstanding land claims issues in Alaska. Of the over 420 million

acres of land of Alaska, the settlement reached between the indigenous peoples in Alaska and the U.S. government came in the form of 44 million acres of land and \$962.5 million in cash. For-profit corporations were formed to hold the land in fee simple absolute ownership instead of reservations and the funds were distributed to the Alaska Native Corporations. The ANC corporate structure, funded by settlement land and cash, became the engine through which Alaska Native people were meant to benefit culturally, socially, and economically.

There is ongoing controversy about whether using a for-profit corporate structure is effective and appropriate. Several researchers have identified arguments that indicate weaknesses in the corporate structure to provide the correct vehicle to reach the ANC's stated mission. Anders and Anders (1986) cited other elements of the debate over the terms of the settlement:

the focus was almost solely on the corporation as the vehicle for a settlement. Remarkably, the presettlement debate gave no serious consideration to developing a more democratic entity that would more nearly meet the economic and cultural needs of the Native peoples. As established, the Native corporations leave important decision-making power in the hands of a few corporate leaders. (p. 214)

In addition, Anders and Anders (1986) indicated several other weaknesses to consider such as can these institutions become effective for-profit corporations and can "Native traditional values be successfully integrated within the imposed corporate organizational framework" (p. 213). This dissertation project contributes needed data and analysis in this area. My research adds to a relatively sparse body of research in the Alaska Native context and an even more limited body of research on Alaska Native Corporations. EFR, as a method, has not been used to study organizational values nor has it been used in an ANC context so it offers some unique benefit to the academic community. Most exciting to me, as a shareholder, is the amazing opportunity to facilitate a vision of what Native values will look like at Sealaska in the next 15

years in a way that is accessible, relevant, and actionable and offer a culturally appropriate research method to others working in a similar context.

Alaska Natives have been struggling to make Alaska Native Corporations a success in a manner that honors their original mission and the changing mission over time to ensure that shareholders thrive culturally and economically on their own homelands in perpetuity. The for-profit business structure of the Alaska Native Corporation, the mission like that of a non-profit, and include strong Native values have been in a state of value conflict for 40 years. My dissertation sheds light on the factors at play in this value conflict and proposes scenarios for optimal integration of Native values within an Alaska Native Corporation.

Dissertation Question

My research question is, “What is the future of Native values at Sealaska Corporation?” This question paired with EFR as a method reveals how Alaska Native values could manifest in concrete outcomes over the long term within a corporate structure. It also describes the circumstances that may influence those outcomes, along with the collective value and agreement on those outcomes to our current corporate leadership at the board, executive, and management levels. Given that Sealaska is working through the process of incorporating Native values into the foundation of the company and revising its mission and values, research on the future of Native values at Sealaska is especially relevant and timely. In today’s ANCSA corporations, exploring this question has the potential to provide insight into a possible future and strategic steps to make that future more achievable for the corporation. The values adopted as the founding values for Sealaska center on four concepts: honoring and carefully using our land; considering past, present, and future; building strength, leadership, and balance, including obligation and accountability; and working together. These values offer a powerful foundation

for action. This research process complements such efforts in that it has the potential to surface concrete, attainable steps to reach a collective, shared vision of values in action at Sealaska.

Researcher Positioning

It is important to share with you that I am not unbiased on my dissertation topic nor do I feel it necessary to be unbiased and objective to complete this project. In fact, it would be counter-productive if I did not hold the place in my community and position within the Native corporation that I do. It is my “insider” positioning that has afforded me both the individual and collective knowledge by which my research comes alive. I am passionate, curious, and hopeful that the work I do here will benefit my people. I am Tlingit and Haida, born and raised in a small southeast Alaska village. I am a shareholder in both a local and a regional (Sealaska) corporation. In addition, I am an employee of the corporation. As the below description of my research process illustrates, I conducted research pertaining to my family, tribe, leaders, employer, and myself. In the following paragraphs, I outline my own experience with personal cultural value conflict, my experience with Alaska Native corporations, my experience as an employee in an Alaska Native corporation, and my preferences as a researcher.

As with all research, the first and potentially largest barrier to good research is the researcher. Therefore, the first position I describe is that of my own experience with cultural value conflict. My journey began with assumptions founded in personal experience of understanding and changing personal cultural practices in order to adapt to new contexts. I am Tlingit/Haida from Kake, Alaska. I am Raven/Fresh-water-marked Sockeye on the Tlingit-side and Eagle/Hummingbird on the Haida side. The prior introduction tells people in my Native communities who I am related to, which reflects the obligations and responsibilities I have in large community events, such as at funerals. My introduction thus ties me to a familial map and

provides a relational sense of my standing within the community, standing not as an individual but standing in a collective sense, standing on a foundation that is literally built on the actions and integrity of my ancestors.

I left this knowledge of place, relationship, responsibility, and shared values to go to college at Massachusetts Institute of Technology (MIT). I worked to translate my cultural beliefs into a new context. Some practices did not translate and others were appropriate and embraced. I tried to understand and adapt to the culture I came in contact with where the values of individualism and materialism were basic determinants for success. The hardest step in adapting to an individualistic worldview was to learn to think as an individual in a selfish sense, from the perspective of “me” without community. In the assimilation process my spirit rebelled and rejected some of the new cultural values I was trying to adopt. A perceived lack of “fit” prompted me to look at ways to meld the conflicting cultural values into some combination that would allow peace, integrity, and balance with respect to the way that I walked in the world including a deep investigation of the Alaska Native values that I hold. I examined how those values were embodied in practice historically and what behaviors and practices those values have in my current context. My personal behaviors and practices are different today after engaging in deep reflection, however, the values driving those activities have remained the same. These values include acting as a cultural and economic steward for future generations, taking care of those who cannot care for themselves such as the young, the old, and the sick or families during hard times, taking care not to offend others, and doing my part to keep the balance in our community.

I see my personal struggle to translate and adapt appropriate cultural values mirrored in the corporation. Alaska Native Corporations also struggle to find balance between traditional

Native values and Western corporate values. My understanding and experience is that culture can be changed at the level of behavior and practice. I have not personally changed my Native values but I am consistently aware when my values conflict within other systems. I strive to create the right behavioral alignment for future action when a conflict is perceived. I believe this balance can be achieved in the Alaska Native Corporate structure as well, should it be desirable.

The second position it is important to describe is that of my perspective of the Alaska Native Corporation and my historical experience with this type of institution. Although my perspective has changed over time, it is nevertheless important from a transparency perspective to explain the progress of my relationship with this institution, in a general sense.

As an Alaska Native with both a Western education and cultural and traditional training and influence from birth, I have been an observer of ANCSA corporations since my grade school years. First, I became hypnotized by the family politics in the local ANCSA corporation. I had family members on the board of directors and heard about all the negative things that the corporation did. I heard about corruption in the system. I saw “nepotism,” as I perceived it, through youthful eyes. Initially, I felt that the corporations were not really a benefit to our Native communities, that they broke more things than they fixed. I could not see the values that I felt reflected in those institutions. They did not seem to live up to the words given to us about corporate goals and visions. The corporation felt as though it were a foreigner to my world. For a sense of what this meant to me, please review the digital story I created about my experience with my local corporation.

Over time, as I learned how these institutions came about, I realized that there are reasons that corporations perform as they do, I began to understand the complexity of the context these institutions had to perform in. I was then able to identify how some Native cultural elements

may have seeped into the corporate structure without true intention, as a direct result of the number of Native leaders on the board, the number of CEO's and high managers who were Native, and the unusually high level of involvement of shareholders in the corporation. I began to see infrastructure issues that may have stemmed from a conflict of values that were not resolved. There is evidence that some of the value conflicts are based on Native values. At that point, I began to see the potential of shaping the corporate infrastructure to better serve the mission of these Native corporations, where the bottom line includes both cultural and economic benefit for generations of Alaska Natives; however, in order to realize this potential, these institutions must consciously adopt and integrate the Native values that best align with their cultural and economic stewardship, enhance work effectiveness, and adapt, stop, or reassess why some Native practices interfere with the work of the corporation. I intentionally use the phrase "Native practices" because I believe that whereas values are integral to our people, it is the translation of those values into newer contexts, such as Native corporations, that cause confusion.

As previously indicated, I am a current employee within Sealaska. My views are shaped, in some regards, by the ANC context. I am also in the midst of several projects and discussions around revising our vision, values, and mission, activities that function as shared building blocks for my dissertation project. In addition, as a director with some strategic position and voice, I can influence some of the discussions. It is important to clarify, however, that I work mostly as a facilitator and coordinator in my role as an employee. My work on the "Values-in-Action" process is a consensus process and most others involved have more power, authority, and experience. As a result, there is little to no danger that I will unduly impact the outcome.

Finally, it is important to establish my preference as a researcher. I have noticed that I like to focus on actionable research that inspires or is an impetus for change. I enjoy qualitative research, in particular from the viewpoint of helping others to see the knowledge they hold both individually and collectively. I am anxious to help my corporation, my tribe, my leaders, my family and myself to see the potential we hold to shape the ANC corporate structure to meet our unique needs and to be in alignment with our Native values. To reiterate a previous point, I will be researching my family, tribe, leaders, employer, and myself.

Literature Review Overview

The literature relevant to my dissertation question encompasses several areas. The first area I review consists of an examination of effective research in Alaska Native and indigenous contexts. I then describe and analyze the body of research on value conflict at the organizational level. This area is the largest and most in-depth review because it is the main topic of my research. The final section of the literature review includes a discussion of research on the Ethnographic Futures Method and a description of the method's founding and growth.

In the course of this literature review, I identified gaps in the research in the area of Alaska Native Corporations. Much more can be found on effective research in Indian country, and while not all is directly relevant, it does provide support for qualitative, authentic, inclusive research as the most effective type in this general area. In addition it is difficult to find relevant research that includes values conflict research at the organizational level, especially in areas related to indigenous or ethnic values in a work environment.

Structure of Dissertation

This dissertation includes six sections as follows:

Chapter I, an introduction, covers the purpose and importance of my research, author positioning, the research questions, an overview of the literature to be presented in Chapter II, as well as any gaps in the research identified during the course of the review.

In Chapter II, I present a literature review of value conflict in organizations (more broadly values research at the organization level) and a survey of research on the Ethnographic Futures Method and research in Indigenous or Alaska Native contexts.

Chapter III provides an overview of the chosen methodology, the Ethnographic Futures Method, as well as a description of the reasons why I selected the method as the most suitable tool for addressing my research question. The chapter concludes with a description of the process and participants.

Chapter IV includes a summary of all of the data collected and a detailed description of the process used to analyze the data.

In Chapter V I discuss the themes and ideas that arise from the interviews and provide a final summary of the discussion with participants focused on the aggregation of the data from the interviews along with any specific recommendations for the future.

Chapter VI provides an analysis of the implications of this research, the potential future for further research, and an analysis of the value of the completed research.

Scope and Limitations

I will be conducting my research within Sealaska, a parent company that owns subsidiary operations, with some subsidiary executive representation. My study is intended to help build an understanding of the future of Native values from the perspective of a small group of

representational leadership. While the group is small, it is a representative group with extensive influence. Within Sealaska, each person on the board is Alaska Native, a shareholder, and elected through a corporate shareholder elections process, where there are over 20,000+ shareholders. The executives and managers selected for participation are either at the top of a subsidiary or the parent company, or within two levels of the top executive. All selected participants are Alaska Natives and shareholders of the parent company.

It is important to acknowledge that this is a unique way to study values and value conflict within a Native organization. Generating a vision of what the values will be and what they will manifest in 15 years, along with how the value conflicts are resolved in order to achieve that visions, is a provocative way to study and understand the central role Native values play in the future of Sealaska, a vehicle that can in part help steward our lands, cultures, and economic security into the future. Based on the review of literature, I have not discovered any similar research on values at the organizational level using the EFR methodology. My research should therefore be considered both experimental and exploratory. In addition, this research is actionable because it generates a product that can be used to guide future decision-making and action within the company.

Chapter II: Literature Review

The research question guiding this dissertation is, “What is the future of Native Values at an Alaska Native Corporation (ANC)?” Because there are limited bodies of research relevant to my question, strands and fragments of research are connected to illuminate the landscape, the contours of context, of the previous research that is most relevant and applicable to my question. First, I attempt to understand the research on similar organizations within the population of Alaska Natives who make up the shareholder base of Sealaska—the Tlingit, Haida, and Tsimshian peoples. I then look briefly at indigenous/Alaska Native values research. I then examine how values research has been done at the organizational level in cross-cultural contexts. The final section of literature review will be covered in Chapter III with a description and assessment of the Ethnographic Futures Method used in my research.

Alaska Native Corporation Research-Literature Review

It is important, prior to describing research on ANC's, to provide an overview of the history of Indian policy in Alaska, economic drivers and Alaska Native activism that generated the framework that formed the Alaska Native Corporation, the Alaska Native Claims Settlement Act (ANCSA). A short-description of the main elements of ANCSA will be provided as context for the literature review overall.

In Alaska, there were several relevant factors that are considered to have provided the impetus for the creation of ANCSA. The table (2.1) below outlines interesting timeline elements that help to illustrate four areas that stand out in the history of Alaska as it relates to ANCSA. The timeline visually summarizes historical political and economic context compiled from five authors; Anders (1989), Colt (2001), Flanders (1989) Korsmo (1990), Thornton (2002), Tyler (1973).

Table 2.1

Visual Timeline Leading to Passage of the ANCSA

	Tribal Engagement	Economic Drivers	Alaska Legislation	Indian Policy
1860		1860's gold found in Alaska.		1850's Reservations
		1870's Alaska Salmon industry began.	1867 Alaska purchased from Russia.	1871 end of "Treaty Era"
1880			1887 General Allotment Act (Dawes Act) passed. Reservations were divided and land granted to individuals, land held in trust for 25 years, there were 4 years to make selection or it would be made for individuals, unallotted land could be sold by the government.	The Dawes Act is considered as assimilation.
1900	1912 Creation of Alaska Native Brotherhood. Alaska Native Sisterhood created shortly after.		1912 Territory of Alaska was created.	
1920	1939 Central Council of Tlingit and Haida Indian Tribes of Alaska (CCTHITA) created to handle land claims.		1935 Tlingit and Haida Indians filed claim for taking of aboriginal lands without compensation. Arguing that the treaty acquiring Alaska from Russian did not extinguish land claims.	
1940	1947 CCTHITA filed their land claims. 1959 CCTHITA Land claims settled.		1936 Alaska Reorganization Act passed. Reservations and tribal governments could be created in Alaska.	This is considered by many to be a period of restoration. 1950's are considered the termination era.
1960	1960's ANB relaxed opposition to the perpetuation of traditional native customs. 1st generation of college educated leaders emerged. 1966 Alaska Federation of Natives was created.	1968 Oil discovered on the North Slope of Alaska. Oil was on state lands but would have to be transported across 700 acres of lands that were in contest through Alaska Native Land Claims.	1959 Alaska becomes a state. It begins to select land claimed under Native land claims. 1966 Secretary of Interior Udall halted State land selection until Native land claims were settled. 1967 Governor Hickel formed a Native Claims Task force which presented first draft one year later. 1971 Alaska Native Claims Settlement Act was passed.	
1980	1968 CCTHITA land suit settled for \$7.5m and 2.6M acres of land title was not extinguished which was the basis of the ANCSA settlement.			1975 began an era referred to as Self-Determination.
2000				
2014				

As can be seen, there was a confluence of events that supported the development and implementation of the Alaska Native Claims Settlement Act. What is not evident in the table above or even specifically in the literature, is how the corporate structure became the agreed

upon vehicle to contain this settlement. Anders indicates, “Almost from the beginning, the AFN leadership seemed to insist on corporations as a settlement vehicle. Reasons given for this selection of corporations deal mainly with the Natives’ desire to reduce the bureaucratic control of the Bureau of Indian Affairs (BIA)” (1989, p. 287). Flanders (1989) indicates that the idea to use the corporation as the form for this settlement came from, “advice from Natives in the 48 contiguous states” (p.302), when they were asked what the best institutional form for this settlement was. Colt (2001) indicates that the idea for the corporate structure is found to be rooted in the 1968 Federal Field Commission. Anders also writes, “And, while ANCSA was ratified by the 600 delegates at the AFN annual meeting, in truth the majority of Alaska Natives had little appreciation for the settlement’s highly complex terms” (p. 287). This last sentiment, that of little true understanding of this corporate institution for use in this context and with this population, is a familiar theme across all of these authors.

As can be seen in the timeline, there are accepted phases of Indian policy in the United States, ANCSA was seen as a policy of self-determination initially. When looking back, some call this a refined assimilation. The actual settlement, for reference, is summarized by Colt (2001):

ANCSA transferred 44 million acres of land and \$962.5 million in cash to business corporations owned exclusively by Alaska Natives. The act established 12 regional corporations and approximately 200 village corporations. Each Alaska Native alive at the time of the act (December 17, 1971) was allowed to enroll in a village corporation, which choice automatically enrolled them in the corresponding regional corporation. (p. 64)

In addition, Colt (2001) describes the special elements of ANCSA. The first is that shareholders could not sell their shares years. Under the original act at the end of 1991, “stock was to be liquidated and new stock issued without voting or sale restriction,” (Thomas, 1988). This made these Alaska Native Corporations vulnerable to takeover and all assets transferred to

Alaska Natives under the Alaska Native Claims settlement act open to sale to non-native shareholders. Since the corporations own the land specifically, this was and is a valuable asset. Although, this structure of removing the restrictions on stock sale in 1991 within the original act may not have been intentionally assimilationist, with the context and history of Indian policy in the US, it may be fair to infer that this was the intent. Amendments to ANCSA in 1991 removed this rule. Despite this history, this project is about what we might do moving forward to continue building a corporate form that is in alignment with Alaska Native values. Now that context about the creation of Alaska Native corporations has been established, the next paragraphs will reveal the types of research similar to my project that I was able to find within the ANC sector.

I first sought to understand the breadth and depth of research in this area within the ANC context. The search revealed only three types of information, two of which are not particularly helpful. The search revealed a lot of newspaper and other popular articles based on subjective opinion. The second most prevalent set of materials were legal cases involving ANCs, and the third was material on the Alaska Native Claims Settlement Act (ANCSA) itself or aggregated at the level of ANCSA corporations in general, along with a few specific examples. The third facet of ANC research reviewed here consists of studies covering basic historical aspects of ANCSA, main points of failure in the act, evaluation of the act over time, and vital details of the complex nature of Alaska Native governance of which ANCSA corporations are but one element.

The research focused mainly on debates over whether a corporate structure in the Alaska Native context created by ANCSA is effective. For contextual purposes, this question has existed since ANCSA was being developed. From the perspective of Alaska Natives, the corporate structure was preferable to being under the control of the BIA (Anders & Anders,

1986). Scholars such as Anders and Anders and Hirschfield (1992) have concluded that the corporate structure was yet another assimilationist/termination tactic to move Alaska Natives toward a Western worldview. Hirschfield (1992) posited that, “The unprecedented structure that Congress chose for administering ANCSA benefits reflects ‘a tension between the goal of assimilating Alaska Natives and the goal of safeguarding the ancestral lands and culture of Alaska Natives’” (p. 1340).

Several researchers have asked whether the values and goals of the Alaska Native groups can be reconciled with a for-profit corporate structure. The article most relevant to this topic is Anders and Anders’ (1986) “Incompatible goals in unconventional organization: The politics of Alaska Native Corporations,” which “discusses fundamental differences in values, goals, and operational styles of conventional bureaucratic corporations, and contrasts them with the shared values of Alaska Natives” (p. 213). Thornton (2002) indicated that corporate values can conflict with subsistence lifestyles of Native communities. Another example is provided by Li, Ramirez, and Waller. (2009): “McNabb (1992) argues that the concept of ‘private property’ is alien to the traditional ‘common property’ culture of the Alaska Natives, therefore creating a handicap for them to benefit from the settlement” (p. 8).

Others have looked at performance of the ANCSA corporations over time. Colt (2001) and Flanders (1989) investigated different aspects of ANC financial performance and provide comparison data showing that when ANCs are compared to the typical Western corporation, the ANCSA corporations cannot be considered as generally financially successful. Li et al. (2009) discussed the specific elements of the corporate structure that impede performance such as the lack of ability to sell or consolidate a large number of shares; and the fact that shares are diffused rather than aggregated under the ANCSA system. Despite described barriers to success, ANCSA

corporate performance has been improving since 1991 based on three factors: 1) better experience, 2) better internal controls, and 3) better governance (Li et al., 2009). While describing poor financial results, some question whether these financial comparisons are the right comparisons to make. Colt (2001) asked whether it makes more sense to compare performance to a reservation system instead of for-profit corporations brought many other factors, not relevant to a typical corporation into his analysis, such as shareholder employment. Buchanan (2010) considered whether measures more in line with the corporate purpose should be investigated using cultural and social measures in addition to financial measures. Buchanan's approach offers a more holistic picture of ANCSA performance. Buchanan's research touched on the question of the overall benefits provided by Alaska Native Corporations, such as the benefits that flow to shareholders from 8a contracts.¹ This approach more accurately reflects the progress of Alaska Native Corporations because while many ANCs may not achieve high financial goals, deeper investigation may reveal that the political network, advocacy influence, and capacity development of shareholders, through scholarships and internships as well as the development of shareholders as corporate employees, are more significant than can be captured by just looking at financial results. It is these other types of results, which are harder to measure, that position Alaska Natives for future success.

Finally, one must look at ANCSA corporations and their effectiveness within the larger context of Alaska and other Alaska Native institutions. Thornton (2002) described the added complexity of the governance landscape in Alaska pointing to the Indian Reorganization Act Tribal Councils, ANCSA regional and village corporations, and the Central Council of the Tlingit and Haida Indian Tribes as relatively new layers of complexity to add to an already

¹ 8a is a program within the Small Business Administration intended to improve minority and Native American opportunities in federal contracting.

complex sociopolitical canvas of traditional governance. These institutions, with similar goals to ensure cultural and economic prosperity, serve the population in different ways, with varied resources and capacity to address these goals. If an outsider were to look at the complexity of these institutions, they would see redundant services, overlapping jurisdiction, and extensive tribal, political, and economic complexity or even entanglement.

The review above showcases the limited scope and reach of research completed within Alaska Native Corporations. Indeed, this dissertation is the first study I have been able to identify that focuses deeply on one Alaska Native Corporation. The previous review gives a sense of the state of research and an overview of the Alaska Native Corporate structure, its failings, performance, and context. Next, it is important to review research on indigenous and Alaska Native Values.

Indigenous Values/Alaska Native Values

Providing a glimpse of indigenous values in the literature and narrowing the scope of this broader analysis down to Alaska Native values is useful to draw a distinction between Native values and those values described in most Western or global values research. It is vital to remember that indigenous groups are not homogeneous, however, there are some general indigenous values of use in this case. Indigenous values can be viewed as characterized by Dumont (1993, as cited in Redpath and Nielson, 1997), “The spiritual core of Native values is a vision of wholeness, where all things are interconnected and interrelated” (p. 330). This is an excellent overarching general definition of indigenous values. Each indigenous group has their own more specific set of values that fall within that general definition and those may differ from one another, as you will see below within the next few paragraphs on Alaska Native Values, but do not typically fall outside this general definition.

Most research on Alaska Native values, values of the Tlingit, Haida, and Tsimshian, is presented by a small group of scholars and is found in several main areas. The most ancient and historical body of values research is anthropological research completed on the specific cultures of the Tlingit, Haida, and Tsimshian. Venerable authors in this area include Federica de Laguna and George T. Emmons. These texts offer glimpses of the roots of the practice of the values held today with an emphasis on the importance of providing a sense of what Alaska Native values are generally. To quote from *Tlingit Kusteeyi: The Real Peoples Way of Being* (Sealaska Heritage Institute, 2009):

Haa Aaní: Our Land

Honoring and Utilizing Our Land

- Our ancestors, who have lived in this land for more than 10,000 years, taught us that everything has a Spirit.
- When we utilize our resources, we must acknowledge the Spirits of the Land, Sea and Air and tell them the benefits that their use will bring to our People.
- Our ancestors protected the ownership of our land for their children and grandchildren just as we must do for future generations.

Haa Shagóon: Past, Present and Future Generations

Honoring our Ancestors and Future Generation

- We maintain strong bonds with our ancestors whom we honor through our lives and in our ceremonies.
- We also have responsibilities to our future generations, and we must ensure that we protect our land and culture for our children and grandchildren and those who will follow them.

Haa Latseen: Our Strength

Strength of Body, Mind and Spirit

- The “Way of the Warriors” path is to achieve physical and inner strength. Above all, young men and women are taught to protect and to care for their families and clans.
- They are taught to seek truth and knowledge and to adapt to changing times while maintaining the integrity of our ancient values.

Wooch Yax: Balance

Maintaining Spiritual and Social Balance and Harmony

- Wooch Yax must be maintained to ensure social and spiritual harmony lest ill will goes wondering and causes harm.
- Wooch Yax governs Interrelationships between Eagle and Raven clans
Interrelationships between the Tlingit and others, including tribes, nations and institutions.
- Wooch Yax includes Kaa yaa awuné or Respect for Others and Át yaa awuné or Respect for All Things.
- Wooch Yax requires that our People and our organizations conduct business with Yán gaa doonéekw or “Dignity,” realizing that everything has its rightful place and that all action and business must be done with integrity. (p. 1)

These values give a sense of what is important to the Tlingit, Haida, and Tsimshian. As you see, they do fall under the general definition of indigenous values shared previously. I will not be spending any time reviewing the roots of these values. These general value identifications and definitions are meant to provide a touchstone, a place for the reader to begin in order to see how far we have travelled together at the end of the next section, which captures more of the

global and Western descriptions of values. It is important to share that I am not trying to understand values through understanding each element that makes up these values, but rather to generate a collective vision of what these values will look like within Sealaska in 15 years. Vision, in this case, is the aspirational future state, a detailed picture of Sealaska that reflects the values we hold into the future and how those values manifest themselves in Sealaska and its broader regional context.

The remainder of the chapter focuses on research relevant to value conflict at the organizational level, another key element of my dissertation question.

Values Conflict at the Organizational Level

The remaining literature review is meant to provide an in-depth review of research that touches upon or includes value conflict in an organizational context. The search process will be documented to illustrate that an expansive and thorough search has been completed to uncover all research relevant to the dissertation question. The following pages offer a synthesis describing the dominant area of values research that includes a summary relating these fragments and strands to the dissertation question.

Search Strategy

I reviewed the existing foundational values literature relevant to understanding research on work/social/personal value conflict within an organization or at an organizational level of analysis. The search strategy that I designed and followed included bibliographic indexes, mining, forward citation searching, deep journal searching, and reference to outside resources.

The search began with the main areas of values and the intersection of that search with organizations. When trying to identify a third search term to find the most relevant research, I realized that the third search term was actually not a term but a context conducive to value

conflicts in organizations. I have named that context a cross-cultural arena. Within that arena there is a reasonable expectation for cross-cultural research, for example, research on transnational organizations. Transnational organizations can be expected to be a context for value conflict since they are more likely to cross several different national, ethnic, industrial, and other types of contexts. Figure 2.1 below indicates the types of searching completed during this review of literature.

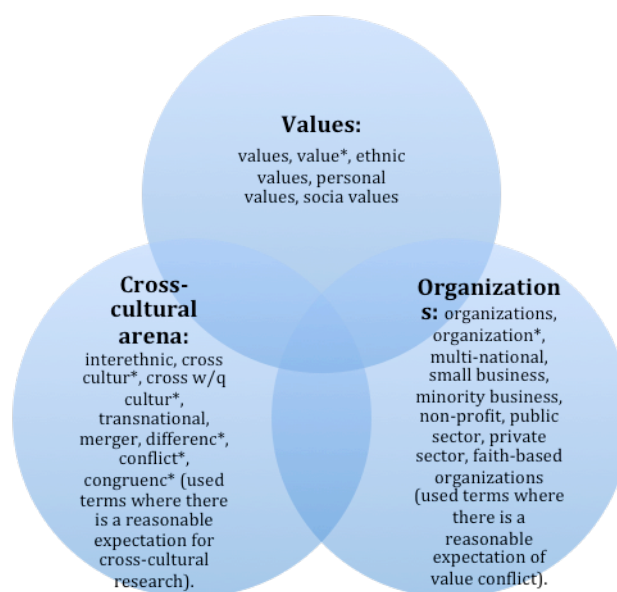


Figure 2.1. Search terms.

One final area searched as an alternate “third term” was “tribes.” The three terms relevant for this review are values, organization, and tribes. Overall, the search identified 579 articles and books in the field of interest, and of those sources 205 articles and books were found to be relevant to this literature review. The search process included looking at bibliographic indexes, data mining, forward citation searching, deep journal searching, and outside strategy.

Gaps in Values Research

My search revealed several gaps in the literature. The first gap was found within the field of research on Alaska Native Corporations. I identified only one article close to the general

topic, specifically on value conflict within Alaska Native Corporations, which was described in the literature review for that topic (Anders & Anders, 1986). The article discussed whether the infrastructure of a corporation could meet the goals of the Native shareholders. The article is a descriptive paper that identifies barriers to ANC success but was not a formal research study. The next gap relevant to my dissertation is the minimal amount of research completed at the ethnic level of value conflict within an organization. I found four peer-reviewed articles that specifically look at incorporating indigenous or Native values into an organization or a business area by Lindsay (2005), Newhouse and Chapman (1996), Redpath and Nielsen (1997), and Rigby, Mueller, and Baker (2011).

Identifying these gaps led me to expand the literature review to include research that is relevant within one or two of the main search criteria but may not meet the third element. For instance, I might find studies examining work values in a cross-cultural arena that is not also at the level of an organization. I am trying, as part of the literature review, to establish a picture of a whole puzzle while missing many of the pieces. The next section includes a description of the definition of terms relevant to this research as well as important distinctions and variations within those definitions, which we can consider taxonomies.

Definitions and Taxonomies

Important definitions of the terms used within values research are covered in the following pages. Terms defined include: values, work values, organizational values, cultural values, and the dimensions and levels to be considered when analyzing values.

Defining values. Values have been defined across anthropological, psychological, and social arenas. The following presentation of common definitions related to this critical review of methods reveals that these definitions are quite varied. As Schwartz and Bilsky (1987) explained:

Although even a cursory review of the literature on human values yields a large number of definitions, there are five features that are common to most of these definitions of values (e.g., Allport, 1961; Levy & Guttman, 1974; Maslow, 1959; Morris, 1956; Pepper, 1958; Rokeach, 1973; Scott, 1965; Smith, 1963; Williams, 1968). According to the literature, values are (a) concepts or beliefs, (b) about desirable end states or behaviors, (c) that transcend specific situations, (d) guide selection or evaluation of behavior and events, and (e) are ordered by relative importance. (p. 551)

Ros, Schwartz, and Sirkiss (1999) indicated that, “The crucial content aspect that distinguishes among values is the type of motivational goals they express” (p. 51). Ros et al. (1999) also created a typology of values that are essential for the “survival of groups” that I refer to in the section identifying the dimensions of values (p. 51).

Dolan, Diez-Pinol, Fernandez-Alles, Martin-Prius, and Martinez-Fierro (2004) provided additional summaries of other foundational scholars in this area indicating that, “values reflect a hierarchy, a preference, from practiced to espoused values.the totality of this order represents the value matrix/system of the person” (p. 159). Dolan et al. (2004) expanded further to explain that “Thus values guide daily actions, bind groups, help resolve conflicts and stimulate development. All cultures contain more-or-less explicit value systems that determine behaviour (Dunkel and Mayrhofer, 2001; Garcia and Dolan, 1997; Schein, 1985)” (p. 159).

Table 2.2 below by Agle and Caldwell (1999) and summarizes the most common definition for values from relevant research:

Table 2.2

Common Definitions of Values and Value Systems

Author(s)	Definition
C. Kluckhohn, 1951, p.395	A conception, explicit or implicit . . . of the desirable, which influences the selection from among available modes, means, and ends of action.
Guth & Tagiuri, 1965, p. 124-125	A value can be viewed as a conception, explicit or implicit, of what an individual or a group regards as desirable, and in terms of which he or they select, from among alternative available modes, the means and ends of action.
Senger, 1971, p. 416	A personal value structure “is a hierarchy of competing, fundamental life directions which act as criteria for psychological behavior.”
Sikula, 1971, p. 281	Personal value system as “a set of individual values that exist in a scale of hierarchy that reveals their degree of importance. Individuals may all possess the same set of values but attach different priorities or degree of importance to them.”
Rokeach, 1973, p. 5	A value is an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence.
Conner & Becker, 1975, p. 19	Values may be thought of as global beliefs about desirable end-states underlying attitudinal and behavioral processes.
Hofstede, 1980, p. 19	A broad tendency to prefer certain states of affairs over others
Ravlin & Meglino, 1987a, p. 667	Social values . . . represent general modes of behavior individuals should or ought to exhibit.
Enz, 1988, p. 287	Organizational values are defined as the beliefs held by an individual or group regarding means and ends organizations "ought to" or "should" identify in the running of the enterprise, in choosing what business actions or objectives are preferable to alternative actions, or in establishing organizational objectives.
Hambrick & Brandon, 1988, p. 5	A broad and relatively enduring preference for some state of affairs.

Note. From “Understanding research on values in business: A level of analysis framework” by (B. R. Agle and C. B. Caldwell, 1999, *Business & Society*, 38(3), 326-387.

Giberson et al. (2009) contributed the following additional foundational definition, “Moreover, values are thought to direct more deeply held individual differences such as

personality traits (McClelland, 1985), and motivate and direct a person's behavior (Locke, 1991)" (p. 128).

It is also important to make the distinction between values and other similar concepts. The differences between values, attitudes, and behavior are stated by Conner and Becker (1994) to be that values "serve as the basis for making choices," whereas attitudes are "orientations toward specific... situations (such as choices)" and behavior is "exercising a choice" (p. 68). Sagie et al. (1996 as cited in Gahan & Abeysekera, 2009) further differentiated values from attitudes indicating that values are stable over time as opposed to attitudes, which "appear to be transitive and context specific" (p. 129).

Because most if not all of the articles reviewed referred to personal values as compared to work values, I have included an additional overview of the definition of personal values provided by Gahan and Abeysekera (2009), foundational researchers in this field, which concludes that personal values have been defined in many different areas and most recently have begun to be used to explain attitudes and behaviors of groups, organizations, and even at a national level. This broader definition of personal values reflects the fact that there is a tendency in the research toward deeper investigation and categorization and typologies of values as well as ongoing discussion of how to measure values, the nature of values, and how they may change over time.

As is shown, there are many definitions of values, most of which are tied to a main theme. It is relevant to discuss these various definitions because they add to the complexity of this research project and cannot be simplified since each definition has been developed related to a research focus or question and all are valid within their individual contexts.

Work values. Work values have sometimes also been called "'work goals' (Ros et al., 1999); 'job orientation' (Manhardt, 1972); and desired 'job characteristics' (Burke, 1966)"

(Gahan & Abeysekera, 2009, p. 130). Dolan and Garcia (2002) defined basic and operating values, in general, in terms of the fact that basic values help a company define the essence of its existence and create aspirational goals for the future, while operating values are the “explicit principles of action that should regulate the daily conduct of individual employees in their work to achieve the vision and mission of the company: mutual trust, customer satisfaction, honesty, teamwork, etc.” (p. 112). Ros et al. (1999) provide the following simple definition, “Work goals or values are seen as expressions of basic values in the work setting. Basic values imply four types of work values—intrinsic, extrinsic, social, and prestige” (p. 49).

Gahan and Abeysekera (2009) indicated that extrinsic values are those related to material benefits of a job such as pay, whereas intrinsic values are those that come from completing the job such as a sense of achievement. These authors share definitional nuances and related concepts offered by other notable researchers, referring to Ros et al. (1999), who suggested that there are four types of work values: intrinsic, extrinsic, social, and “a fourth value which corresponds to the higher order values of power and prestige; namely, achievement, advancement status and recognition” (p. 130).

Business values are differentiated from work values by Watson, Papamarcos, Teague, and Bean (2004), “business values are those criteria used to evaluate the merits of commercial activity... Business values, therefore, are part of the reasons, explanations (social accounts) and objectives for business activity” (p. 339).

Cultural values. Cultural values are most often represented as national culture values; however, it is important to be aware that when looking at a group at a different level, cultural values will be defined differently depending upon the level of analysis being completed. Schwartz (1999) asserted that:

Cultural values represent the implicitly or explicitly shared abstract ideas about what is good, right, and desirable in a society (Williams, 1970). These cultural values (e.g. freedom, prosperity, security) are the bases for the specific norms that tell people what is appropriate in various situations. The ways that societal institutions (e.g. the family, education, economic, political, religious systems) function, their goals and their modes of operation, express cultural value priorities (Bourdieu, 1972; Markus & Kitayama, 1994). (p. 25)

Schwartz (as cited in Dolan et al., 2004) defined culture in relation to cultural values as “The system of meaning—values, beliefs, expectations and goals, shared by members of a particular group of people and that distinguish them from members of other groups” (p. 158).

Giberson et al. (2009) differentiated organizational culture from cultural values:

A number of models of cultural values have been presented in the organizational literature, each offering a different set of values believed to represent organizational culture (e.g., OCI, Cooke and Lafferty 1987; OCP, O’Reilly et al. 1991). Moreover, organizational culture theorists argue that organizations embody a relatively narrow set of values (Kluckhohn 1951; Schein 2004), and suggest that specific values are most helpful in understanding organizational processes (Meglino and Ravlin 1998). (p. 124)

The definition of cultural values is important, as it is defined both at a national and a social group level. Although core cultural values among indigenous peoples are specific by tribe, there are a few values that seem to be accepted as more universal among indigenous people. Harris and Wasilewski (2004) completed a process to reach agreement on these values for multiple indigenous culture areas in the United States. The values put forth from this research process are relationship, responsibility, reciprocity, and redistribution. In general, relationship refers to our interdependence with each other and our environment. Responsibility captures the idea that we must care for each other and our environment, not only today but into the future. Reciprocity captures the idea of exchange and obligation. Redistribution is about the idea of balance within our relationships with others and the land.

Dimensions of values. Schwartz and Bilsky (1987) provide a good summary to help begin to understand the dimensions of values, as quoted earlier in this dissertation, “values are (a) concepts or beliefs, (b) about desirable end states or behaviors, (c) that transcend specific situations, (d) guide selection or evaluation of behavior and events, and (e) are ordered by relative importance” (p. 551). Schwartz and Bilsky go on to define (a) above as:

Values are cognitive representations of three types of universal human requirements: biologically based needs of the organism, social interactional requirements for interpersonal coordination, and social institutional demands for group welfare and survival (cf., Becker, 1950; Kluckhohn, 1951; Parsons, 1957; Rokeach, 1973; Williams, 1968). (p. 551)

Ten motivationally distinct types of values were derived from these three universal requirements (Schwartz, 1992). The following table lists these value types, defining each in terms of its central goal and noting specific single values that primarily represent the value type (Ros et al, 1999, p. 52).

Table 2.3

Value Types

POWER:	Social status and prestige, control or dominance over people and resources (Social Power, Authority, Wealth).
ACHIEVEMENT:	Personal success through demonstrating competence according to social standards (Successful, Capable, Ambitious, Influential).
HEDONISM:	Pleasure and sensuous gratification for oneself (Pleasure, Enjoying Life).
STIMULATION:	Excitement, novelty and challenge in life (Daring, a Varied Life, an Exciting life).
SELF-DIRECTION:	Independent thought and action-choosing, creating, exploring (Creativity, Freedom, Independent, Curious, Choosing own Goals).
UNIVERSALISM:	Understanding, appreciation, tolerance and protection for the welfare of all people and for nature (Broadminded, Wisdom, Social Justice, Equality, A World at Peace, a World of Beauty, Unity with Nature, Protecting the Environment).
BENEVOLENCE:	Preservation and enhancement of the welfare of people with whom one is in frequent personal contact (Helpful, Honest, Forgiving, Loyal, Responsible).
TRADITION:	Respect, commitment and acceptance of the customs and ideas that traditional culture or religion provides (Humble, Accepting my Portion in Life, Devout, Respect for Tradition, Moderate).
CONFORMITY:	Restraint of actions, inclinations and impulses likely to upset or harm others and violate social expectations or norms (Politeness, Obedient, Self discipline, Honouring Parents and Elders).
SECURITY:	Safety, harmony and stability of society, of relationships, and of self (Family Security, National Security, Social Order, Clean, Reciprocation of Favours).

The second facet, (b) above, relates to terminal and instrumental goals. These were summarized by Karabati and Say (2005) as follows, “Values may be categorized into two types: instrumental values versus terminal values (Rokeach, 1979). Briefly, instrumental values refer to desirable modes of behavior while terminal values define end states” (p. 86).

Scholars of course refine or disagree with the above distinctions among themselves.

Schwartz and Bilsky (1987) list these distinctions:

Rokeach (1973) noted that terminal values sometimes serve as means to promote other terminal values (e.g., social recognition serves to promote happiness), thereby functioning as instrumental values. Heath and Fogel (1978) found that respondents who asked to sort values into terminal and instrumental categories did not distinguish sharply between the two categories. (p. 560)

The third facet identified by Schwartz and Bilsky (1987) consisted of the different motivational domains. A summary table based on that originally created by Schwartz and Bilsky shows these domains, the description of the domain, and the values associated with them.

Table 2.4

Motivational Domains

<i>Domain</i>	<i>Description of Domain</i>	<i>Values</i>
Enjoyment Domain	“Every organism must satisfy its physical needs and derives pleasure from doing so.”	“pleasure, a comfortable life, happiness, and cheerful.”
<i>Security Domain</i>	All need to maintain physical integrity and safety.	“inner harmony, family security, national security, and a world at peace”
<i>Achievement Domain</i>	Humans desire to thrive based on ability to succeed in physical and social environments.	“capable, ambitious, and social recognition”
<i>Self-Direction Domain</i>	Humans desire to experience themselves as effectively controlling life events.	“imaginative (daring, creative), independent, intellectual, and logical”
<i>Restrictive-Conformity Domain</i>	Individual actions that might hurt others' interest are inhibited.	“obedient, polite, clean, and self-controlled”
<i>Prosocial Domain</i>	An active concern for the welfare of others is required for collective success.	“helpful, forgiving, loving, and equality”
<i>Social Power Domain</i>	Status differentiation	“power, leadership, and authority”
<i>Maturity Domain</i>	“This is a goal that people reach only through experiencing and coming to terms with life, by learning to understand, to make peace with, and to appreciate the social and physical reality as it is—that is, by becoming mature.”	“wisdom, broadminded, mature love, a world of beauty, and courageous (standing up for your beliefs)”

Note. The above table reflects an attempt to show the main ideas conveyed by Schwartz and Bilsky (1987) and is a generalization not to be taken as direct quotes or language of the authors unless indicated with quote marks as summarized and quoted from pp. 551-553.

Dolan et al. (2004) indicated another way of breaking down the concept of values as shown in the following quote:

Other scholars classify values into three types according to their nature as instrumental, affective, and cognitive (Elizur and Kolowsky, 1996; Zarhi and Elizur, 1996). In organizational behavior, instrumental values include relationships with others such as colleagues and superiors; affective values are responsibility, influence, feedback, the importance of work, etc.; and cognitive ones include status and contribution to society. Elizur (1984) describes terms this classification as “work outcomes.” (p. 160)

In summary, the complexity of definition and the multiple layers of dimensions within each definition of values are evident based on this review of the research. Such complexity requires that a research question based on values be carefully aligned with the correct focus, definition, and dimension of values to be investigated. In addition, it is easy when looking at these values in comparison to the Alaska Native values to see that there are distinct differences. The review of the literature on various aspects of values pertaining to my study thus indicates that values within global, indigenous, and Western research are complex and vary by level of analysis and context of research.

Levels of Values Analysis

This review of the literature brought to light the ways in which the subject of values is studied at various levels. The levels scholars used to approach values analysis ranges from individual to national to universal in nature. When looking at individual, organizational, occupational, ethnic, or subcultural (minimally defined under cultural values), national, or universal values as compared to one another it is easy to see how confusion could develop. Conner and Becker (1994) argued that:

we suggest caution in the use of the term values. The yield will be the richer for investigators' adopting Kluckhohn/ Rokeach/Williams view of values as (abstract) desirable modes of conduct or end states of existence- with the notion of desirability referring to the exercise of choice. Frankly, this means that the term should not be used as a label for situation-specific concepts; it should not be used to describe attributes,

rewards, or importances that are associated with a particular object or situation, as a job. (p. 71)

Agle and Caldwell (1999) offer the most detail around the concept of level of analysis in values research. Their process is to actually develop a framework for levels of analysis. They provided an excellent overview of the levels of analysis that must be considered, indicating that one can, “distinguish the level at which the values are held or exercised (i.e., are the values individual, organizational, institutional, societal, or global)” (p. 329). Agle and Caldwell (1999) quoted several authors over several paragraphs:

Is the value held- or is it such that it ought to be held—by a person or by a group, and then what sort of a group? Further indicating that initially values were studied...at the level of greatest interest to the field’s founders (i.e., personal values as studied by Rokeach, 1968; Spranger, 1928). As the study of values expanded to areas outside psychology and philosophy, the level of analysis was expanded from individual to organizational and beyond...A custom approach to values research is encouraged, because values exist at all levels and interact with values at all other levels. (p. 330)

Agle and Caldwell (1999) found that “five levels should be considered: individual, organizational, institutional, societal, and global” (p. 331). A thorough understanding of the level of values is essential to my research as I will be comparing and contrasting research that has been completed at different levels.

Examples of Relevant Research

As stated earlier, it is important to understand how this type of research has been completed in the past. In the process of this deep investigation of research I therefore narrowed my review to 12 exemplars that show the wider context of research and provide insight into my dissertation question. The following section contains a description of the selection process and the justification for inclusion of the final eight research projects.

Selection of relevant examples. When determining which articles to critique at a deeper level, it made sense to select the articles most relevant to resolving cross-cultural value conflict

at the a level that offered up material relevant to the question, “What is the future of Native Values at an Alaska Native Corporation?” Below is a figure that shows the values and context of the research question.

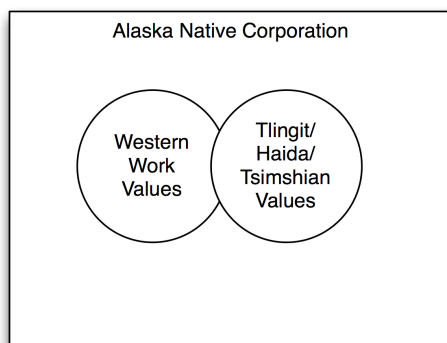


Figure 2.2. Research question.

It was surprisingly difficult to find articles at the intersection of these terms relevant to my question. My search revealed four articles that are directly relevant to my question and on research completed within an indigenous context. There is a large body of research that is based on the national level of cultural values and the organization, and not much that informs the intersection of a subculture/organization/ work values. Therefore, to find additional research relevant to work values and cross-cultural values I focused on value congruence, ethics, value conflict over time within one industry, integration of national cultural elements into work values, work value conflict produced by multi-faceted cultural value context, multiple ethnic groups and their values within one profession, value conflict within religious organizations, and international alliances or mergers. Each exemplar is relevant for different reasons and is directly related to my study as will be shown. The articles selected reflect the contours and gaps, the “map” of research with respect to the intersection of values from both a work and cross-cultural perspective. The table below shows the 12 selected articles, the area the research was completed in, the level (national, organizational, professional, ethnic, or personal) the research focused on, and the

method used. Criteria for selection included the relevancy of the question and method to my research question, whether the research helped to reflect the total body of literature, and whether the article represented the diversity of methods identified within this search.

Table 2.5

Research Matrix

Title	Area of Research	Level of Research	Method of Research
Differences in values, practices,, and systems among Hungarian managers and Western expatriates: an organizir framework and typology	Merger/ Partnership	Organizational	Qualitative Case Study
A dynamic model interpreting work-related values of multi-faceted cultures: the case of Iran.	Work Values	National/ Cultural	Qualitative
An examination of the relationship between commitment and culture among five cultural groups of Israeli teachers	Org Commitment	Industry or Profession	Quantitative
The Jesuit difference (?): Narratives of negotiating spiritual values and secular practices.	Religion	Organizational	Qualitative Narratives
Promoting traditional values in design-driven innovation in Chinese business strategies	Work Values	National/ Cultural	Qualitative Case Study
Interplay of values in the functioning of Indian organizations	Work Values National Org International Org	Organizational Personal	Mixed Method
Structure and/or culture: Explaining racial differences in work values	Work Values	Ethnic Subculture	Quantitative
Values congruence and differences between the interplay of personal and organizational value systems.	Congruency	Organizational	Mixed Method
The Integration of Maori indigenous culture into corporate social responsibility strategies at Air New Zealand	Indigenous Values	Organizational	Mixed Method
Toward a cultural model of indigenous entrepreneurial attitude	Indigenous Values	Industry or Profession	Qualitative
A comparison of Native culture, non-Native culture and new management ideology	Indigenous Values	Organization	Qualitative Case Study
Organizational transformation: A case study of two aboriginal organizations	Indigenous Values	Organization	Qualitative Case Study

The figure below shows some of the factors considered when deciding whether the article is relevant to the research question and reflects relevant foundational research on values.

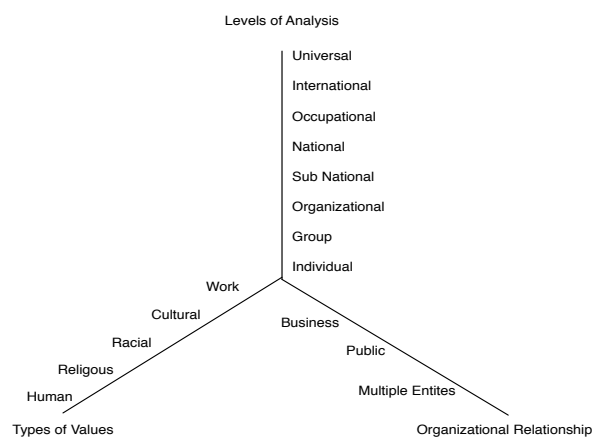


Figure 2.3. Description of selection factors.

The first article, in the list (Danis, 2003) was chosen for its focus on Hungarian and Western differences in values, practices, and systems when joining as international partners. This research shows how cultural and organizational conflicts arise when cultures clash. Values conflict is observable and a matter of importance in the business world. The study looks at merger and partnership, which inherently requires resolution of value differences in real time. The study was chosen because the research focused on the organization level and was repeated multiple times in 17 international cooperative ventures, studying two organizations from different countries and how they integrate. The study provides an examination of the intersection of national level values (Western and Hungarian) and managerial values, a subset of work values, within a multiple entity/organizational context. It is thus relevant as an example of cultural conflict at an organizational level between two nationally different companies.

I selected the Latifi (2006) article on multi-faceted cultures in Iran because of its relevance in showing that there are subcultures and cultural aspects of a country below the national level that connect to work values. The author attempted to build a model within the

structure of Hofstede's work that helps to define the additional facets of cultures within a nation. Latifi's study is significant for my research as it provides an example of the level of analysis, analysis of subculture or multi-faceted aspects of national culture, more closely related to a level of analysis relevant to looking at an indigenous culture and work values.

Cohen's (2007) article focuses on organizational commitment, specifically examining how different types of commitment (i.e., organizational commitment) are related to cultural values as defined by Hofstede (i.e., individualism vs. collectivism) among teachers in Israel across five cultural groups. Cultural is used in the study to refer to the sub-national level of secular Jews, Orthodox Jews, kibbutz teachers, Druze, and Arabs, rather than to a national culture. The article was selected for in-depth review because it looks at culture within an occupational context, at a subnational/cross-racial/cross-religious level. In addition, "it defines cultural contexts according to two criteria: membership in a cultural group and perceived, subjective cultural beliefs" (Cohen, 2007, p. 35). Cohen's alternative view of cultural contexts offers a useful analytical framework for looking at indigenous values or a Native subgroup within a nation.

The most exciting aspect of Kirby et al.'s (2006) "The Jesuit difference(?): Narratives of negotiating spiritual values and secular practices" is the article's consideration of how, people work to translate, define or reconcile their educational values from the perspective of their previous institutions, their personal values, and the Jesuit values within a Jesuit-run Catholic university. This study demonstrated the intersection of values, organization, and cross-cultural context in addition to offering research on tensions that exist, providing a sense of how people can begin to define common values. The research completed by Kirby et al. reflects the kind of

research I hoped to find within this review of literature, research that gives a view of personal and organizational process to define and share common organizational values.

I chose to include Li's (2011) thesis, *Promoting traditional values in design-driven innovation in Chinese business strategies* because it represents an example of successful efforts to incorporate traditional values into a business by looking at the benefit of incorporating cultural values at the organizational level. The link to work values is not evident in Li's study.

Tripathi's (1990) "Interplay of values in the functioning of Indian organizations" contains two studies, both of which analyzed personal and organizational values. The first study looked at both of these types of values in four public sector organizations, whereas the second looked at the same question using a different research method within a multi-national company. I selected the Tripathi article for its detailed process of looking at personal and organizational values and the finding that a company's social context impacts those values. In addition, Tripathi's study suggests that an organization can be more successful if organizational values are aligned with personal values.

I included Kashefi's (2011) "Structure and/or culture: Explaining racial differences in work values" because it specifically looked at the intersection of race, African American versus White, in the United States and is one of the only studies with a racial focus. This is a quantitative study that looks at extrinsic, intrinsic, relational, and enhancement values using annual national questionnaire data as the foundation.

Liedtka's (1989) "Value congruence: The interplay of individual and organizational value systems" rests on the premise that value congruence refers to a state of values that are in line with one another, in harmony. In order for there to be congruence of values value conflicts will necessarily have been resolved. Congruence can be created by resolving value conflicts or

may exist because there are not any value conflicts to resolve. Liedtka "reports on the findings of some exploratory research which hopes to begin to address this void by focusing upon the nature of the value conflicts faced by managers in two firms as they make difficult decisions within the context of the corporation in which they work" (p. 805). Liedtka's research examined value conflict at the organizational level and is thus relevant not only because it has elements of cross-cultural value conflict and provides an example of the importance of the level of analysis in values research, but also because this is one of the few articles that illustrates research of value conflict at the organizational level.

Rigby et al.'s (2011) mixed-method study "The integration of Maori indigenous culture into corporate social responsibility strategies at Air New Zealand (NZ)," explored the value Maori culture brings to the Air NZ brand. As a mixed method study the research included a standard email survey as well as qualitative semi-structured interviews. I included the Rigby et al. article because of its direct correlation to Sealaska as a company integrating Alaska Native Values into the business model.

Lindsay's (2005) "Toward a cultural model of indigenous entrepreneurial attitude" is a qualitative conceptual study intended to develop a model that acknowledges there may be a difference between Indigenous and Western non-indigenous entrepreneurship. This model is based on Hofstede's measures of culture, which include Power Distance, Individualism-Collectivism, Uncertainty Avoidance, Masculinity-Femininity, and Confucian Dynamism. These same measures are found among entrepreneurs who are not bounded by the same cultural values, as is shown in Lindsay's research. This study is particularly noteworthy because it looks at cultural values and indicates how businesses may be approached differently by indigenous entrepreneurs. There seems to be alignment between this model and the experience at Sealaska.

Redpath and Nielsen's (1997) article "A comparison of Native culture, non-Native culture and new management ideology" also provides a comparison based on case study and Hofstede's measures of culture of how indigenous values may create conflict within a Western business.

Finally, Newhouse and Chapman's (1996) "Organizational transformation: A case study of two Aboriginal organizations," presented a picture of two indigenous organizations that tried to integrate Native values into their organizations. One succeeded and one failed. This case study strives to understand why the outcomes were different. In this case study, the difference is that, "The dialectic between the as-yet unconverted and the change agents continues until a critical mass of organizational members shares the interpretative scheme or failing that the scheme is abandoned" (p. 1010). This study is relevant to my research as these two companies are struggling with integrating values into their organizational structure through a different process than I propose. I propose creating a concrete picture of the future which reflects native values while Newhouse and Chapman describe a process of integrating values through, "repeated reinforcement between the interpretive scheme and action" (p. 1010). It seems this study shows two organizations who focused on a process of integrating values which may well be the path for Sealaska, however, the first step is different, the first step in the process I propose is one of defining where we are going collectively.

In addition to the research discussed above, there were select articles that were marginal and therefore were not selected for inclusion. For example, there is one additional area that deserves mention since I was not able to find a suitable study within this area to contribute to this review, namely, studies pertaining to public organizations. Alaska Native Corporations are, in my view, quasi-public organizations due to their dual function as economic engine and social

service agency (mostly in the sense of policy and cultural advocacy). ANC's thus present some interesting correlations to conflicts of ethnic and other values resolutions within a public organization. Hoggett (2006) indicated:

Many aspects of the discourse of management—for instance, such terms as management by objectives, strategic goals, primary task, organizational mission—portray a view of “the organization” which is relatively consensual. In contrast, it is proposed here that we consider that public organizations are intimately concerned with the governance of societies in which value conflicts are inherent and irresolvable... The problem for the public official is precisely that s/he must be both a universalist and a particularist at the same time. For a similar reason there are other value contradictions which the public official is required to enact every day. (p. 178)

Hoggett went on to state that, “at the level of ‘operations’ that unresolved conflicts are most sharply enacted, public officials and local representatives find themselves ‘living out’ rather than ‘acting upon’ the contradictions of the complex and diverse society in which they live” (p. 179).

These statements reflect a “truth” about the level of values conflict that exist within an Alaska Native Corporation and the shareholders they serve since the focus of their purpose swings between that of a regular corporation and a quasi-public organization. This dual-identity is guaranteed to exacerbate the value conflict further by adding diverse publics and social dilemmas to the values conflict inherent among for-profit and non-profit worldviews.

The following deeper reviews of each example are organized along methodological lines to illustrate the types of methods used in values research.

Critique of Quantitative Methods

When reviewing research within the intersection of work values and culture, the most prevalent body of research in this area is cross-cultural research begun by Hofstede. Hofstede completed cross-cultural research within IBM in more than 70 countries between 1968 and 1972,

Hofstede developed a model that identifies four primary Dimensions to assist in differentiating cultures: Power Distance (PDI), Individualism (IDV), Masculinity (MAS), and Uncertainty Avoidance (UAI). Hofstede G. added a fifth Dimension after

conducting an additional international study with a survey instrument developed with Chinese employees and managers. The fifth dimension, based on Confucian dynamism, is Long-Term Orientation (LTO)... These five Hofstede Dimensions can also be found to correlate with other country, cultural, and religious paradigms. (Shi, 2011, p. 94)

Hofstede's or other similar cross-cultural research, such as the Globe study, is not included, except when referenced in a study, in this review because this type of research is performed at a level of analysis higher than the organization. Nevertheless, I have included critiques of Hofstede's work to support that exclusion. For example, Dolan et al. (2004) criticized the lack of adequate treatment of sub-cultures and individuals within each country in Hofstede's work.

Hofstede studies and other research at the "nation" level are not particularly relevant to the cross-cultural work values at an organizational level. Although it is not always helpful to state which research is not relevant to the specific question of my research, it is helpful when the typology, the research landscape, is so significantly shaped by the Hofstede and other studies, which address issues pertaining to culture aggregated at the level of a nation. Research that offers insight to levels of analysis closer to my research question, "What is the future of Native values at an Alaska Native Corporation?" is explored next. My research question explores the issue of values in an organization with a specific ethnic, not national, culture. The two studies presented in this section therefore focus on data and findings relevant at the ethnic or racial social level.

Quantitative study #1. The first study selected, written by Cohen (2007) defines culture very differently than Hofstede because "it defines cultural contexts according to two criteria: membership in a cultural group and perceived, subjective cultural beliefs" (p. 46). Cohen's quantitative study provides an example of research that is closer to the relevant level of analysis although not yet at the specific level of the organization, that of occupation. Cohen stated that:

“This study examines the relationship between commitment forms (organizational commitment, occupational commitment, job involvement, work involvement and group commitment) and cultural values (individualism versus collectivism, power distance, uncertainty avoidance and masculinity versus femininity)” (p.34) within five groups of Israeli teachers from different backgrounds including secular Jews, Orthodox Jews, kibbutz teachers, Druze, and Arabs. The research, a quasi-experimental quantitative analysis, is founded upon 1,328 questionnaires returned for analysis. This study looks at values at an occupational level (teachers) rather than an organizational level, examining in-country differences at a sociological group level. Cohen analyzed the impact of the main social groups and their significant variations within Israel and bounded by teachers in a specific region within a framework of the four cultural dimensions articulated in Hofstede’s work. The Cohen study had two main findings:

First, the five cultural groups related to commitment forms even when cultural values are controlled. Second all of the cultural values are related to forms of commitment, and they add to the variance already explained by the cultural groups. (p. 34)

These results are interesting and relevant to my own research question as they underscore the importance of understanding the need to consider cultural variables within national contexts. As Cohen suggested, “future research should be cautious in comparing countries without a more detailed description of their samples in terms of potential cultural differences between ethnic or cultural groups within it” (p. 46). Indeed it is encouraging that Hofstede’s work is also relevant at the ethnic or cultural groups level within a single nation.

Quantitative study #2. The second quantitative study chosen for review is that of Kashefi (2011). As a very general summary, Kashefi’s research consists of a comparison between the extrinsic and intrinsic values held by white and black workers. Kashefi hypothesized that while he expected to show that “African Americans attach significantly higher

values to ‘extrinsic rewards’ than Whites while White workers value the ‘intrinsic rewards significantly higher than their Black counterparts,’ that...culturally developed work attitudes have been reshaped within high-status occupational context” (p. 638). Data collected by the National Opinion Research Center (NORC) in the 2006 General Social Survey (GSS) data forms the foundation of the Kashefi study. The survey measures “respondents work values and perceptions of their job rewards” (p. 645). A similar study had been completed previously in 1973-1974 and used to, “explore racial differences in work values” (p. 640). Kashefi concluded “that black workers are more likely to value extrinsic job rewards...than white workers” (p. 640).

Kashefi (2011) identified the following specific concepts within the study: Work Values, Race and Work Values, Theoretical and Empirical Backgrounds, Taken-for-Granted Theories, and Reinforcement Theory. The findings confirm the original finding from 1972, however, within high-status occupational contexts, both black and white workers, “display the same extrinsic, intrinsic, and relational work values” (pp. 657-658) but do not display the same enhancement values. Kashefi indicated that, “The final noteworthy point is evident that the realities of racial differences on work values are too complex to be explained by a single theory, either cultural or structural” (p. 659).

Critique of Qualitative Studies

In addition to these quantitative studies, I selected several qualitative research studies for this review. The first illustrates the process of resolving values conflicts within an organization, the second provides some perspective on a potential model for viewing cultural value conflict when used in conjunction with Hofstede’s model of cultural values, the third provides a typology of looking at cultural conflict and resolving those conflicts within an international organizational context, the fourth illustrates the integration of cultural values into a business, and the fifth, sixth,

and seventh examples all address issues pertaining to indigenous values integration into an organization.

Qualitative study #1. The first and perhaps most closely related study to my original question about the future of Native values in an Alaska Native Corporation is set in the context of a Jesuit Catholic University and is based upon Dialogic Theory. This study by Kirby et al (2006) focuses on a process where several professors are trying to understand how the education they provide within their university is different—what the Jesuit difference is? The authors attempted to understand how they each embody Jesuit educational values and Ignatian spiritual values every day on campus. Through narrative, conversations, interviews, and philosophical discourse the following three areas of tension surfaced in this process: “(a) embracing/resisting, (b) inclusion/exclusion, and (c) proclamation/silence” (Kirby et al., 2006, p. 87).

The research, based on ethnography, began with the professors writing personal narratives that outlined, “(a) similarities and differences between CU as a Jesuit institution and other schools, (b) how we see ‘Jesuit identity’ and have come to understand its values, and (c) theoretical reflections on our experience” (Kirby et al., 2006, p. 90). They then meet to discuss and revise their narratives to move toward shared narratives. Along the way, they shared their ideas and incorporated broader audiences within the specific context of the study into the process. They provide their learning through each step, iteratively redefining their understanding of the process using rich description and examples. The following quote captures the process:

Our narratives, interviews, and conversations revealed how we have sometimes felt “pressed” to negotiate our relationship to larger organizational norms and values when discourses of spiritual values and secular practice compete. In these moments, we negotiate our identities as we decide what we can and cannot accept from the organization and how much we want to push ourselves to imbue Jesuit values. Furthermore, we negotiate our identities in relationship to how our choices to privilege spiritual values or secular practices will be viewed by others, reflecting Bakhtin’s (1981)

dialogical ethic that calls us to imagine what we look like to the people around us (see also Frank, 2004). (p. 91)

In reviewing the study, it is credible partly because it spoke to me as “truth” by reflecting a process that I follow myself to resolve value conflict. The study is useful because the process can be used in any organization; however, the findings are unique to the specific organization. The study began with three people, expanded to three more, and then further into the organization showing with expansion and iteration that the three categories remained useful and relevant. The only relevancy weakness that I saw in review of this research as it relates to my specific question is the lack of connection to work values. The study does include work values except as an indirect reference such as indicating that there is pressure to teach as professors taught in MA or PhD programs, or that sometime they are pressured to bow to occupational pressures rather than remaining balanced. Overall, the study shows how value conflicts exist and the potential to resolve them within an organization.

Qualitative study #2. The second related qualitative study is Latifi’s (2006) “A dynamic model of interpreting work-related values of multi-faceted cultures: the case of Iran.” Latifi proposed that Hofstede’s research is not accurate for Iran on its own and sought to develop a supplemental tool that can be used with Hofstede’s national survey to provide more reliable results. This study is meant to develop a mechanism to address the weaknesses identified within Hofstede’s research such as its aggregation of all cultural differences at the national level. Latifi presented a new model of looking at the major facets of a country comprised of ancient culture, Western culture, and Islamic culture. Latifi describes each of these cultural facets with the same category and terminology used in Hofstede’s dimensions. The results shown in three different value profiles support the idea that value conflicts exist between these cultural facets and that the national results from Hofstede cannot be compared or used for any level of analysis below the

national level.

Latifi's (2006) study illustrates the development of a theoretical model and offers intriguing ideas about some main areas and cultural facets that can be used in connection with Hofstede's work, generating data one level down from the national cultural profile. Yet Latifi's research is light on the material used to select the cultural facets, and I am not convinced that these three facets are the only facets of interest to focus on. In addition, the support is light for each of the measurements within each facet, which are used to come up with a general measurement within Hofstede's framework. The description of Islamic culture within each facet is the weakest element of the study given the fact that part of the model relies on specific religious passages to support a general measurement of whether the culture is individual or collectivist. Often, when debating religious texts, the same text can be interpreted in many ways. This is the most obvious weakness observed in the model. The model does offer creative solutions that identify possible variables and relationships between those variables, and begins to provide support for those relationships; however, it is a creative model that is still at the conceptual phase and needs further definition and testing. Overall, this study illustrates one way of adding Hofstede's model to other cultural data to begin to look at ethnic and work values within a profession and within a country.

Qualitative study #3. The third qualitative study is Danis's (2003) "Differences in values, practices, and systems among Hungarian managers and Western expatriates: an organizing framework and typology." Danis explored the clash that surfaces when Western companies clash with institutionalized legacies in central planning in the context of internal alliances between the aforementioned groups, with the goal of pursuing the "theoretical development of a three-level framework to better understand and more precisely operationalize

integration issues in international cooperative ventures (ICVs), and development of a general typology that summarizes and explains key differences among partners” (p. 225).

This study is a multiple case study, made up of 17 individual cases. Each ICV is one case. The author developed seven hypotheses of which about half were supported through the results of the study. Danis’s (2003) typology of differences in values, developed from most frequently mentioned differences in managerial Values, Practices, and Systems (VPSs), included key differences in values, practices, and managerial systems. The study also investigated how these differences were reconciled, “the reconciliation process in most ventures entailed transfer of VPSs from the Western partner to the ICV, facilitated by a realization on the part of key Hungarian managers of the need of change” (p. 240). This means that in most instances accepting the Western values approach resolved conflicts. The research process and typology defined by Danis are useful as a guide for other researchers to follow so long as they are experienced at the qualitative interview process stage. The research process would, however, be very intensive should it be replicated. Danis built the typology from responses within the purview of the study, which, as stated by the author, “is not exhaustive” (p. 242).

Qualitative study #4. The fourth qualitative study is Li’s thesis (2011), “Promoting traditional values in design-driven innovation in Chinese business strategies,” which seeks to,

raise an awareness of how design driven innovation could be used as an important innovation strategy to help Chinese companies gain sustainable benefits. To achieve this goal, the relationships among innovation, design driven innovation and the traditional values based in Chinese culture are illustrated and a successful design driven innovative Chinese Cosmetic Company is employed as a case study in this thesis. (p. ii)

Rather than looking at value conflict resolution, the Li case study looks at the potential power of traditional values in an organization, exploring the case of Herborist, which was selected because it met two criteria: it was considered innovative and its strategy included

traditional Chinese values. Herborist was created after outside products failed to do well in the market. The Herborist brand relies upon holistic balance. Herborist succeeded when other local Chinese cosmetic companies did not, in part because “Herborist believed that beauty is about nature and balance, both of which could be achieved through the use of their traditional Chinese medicine ingredients” (p. 48). As an example of innovation, “one of their best selling products...contains extracts from several Chinese herbs” (p. 53). The values of trust and reliance were translated into the product and the aesthetic values and values of experience were translated into the design of the products and store experience. This is a descriptive case study that reveals how innovation and the incorporation of traditional Chinese values contributed to a company’s road to success.

Qualitative study #5. Lindsay’s (2005) “Toward a cultural model of indigenous entrepreneurial attitude” developed a model using Hofstede’s cultural dimensions along with entrepreneurial attitude research completed in the field of entrepreneurship that shows the potential difference between indigenous and non-indigenous entrepreneurs.

Lindsay (2005) proposed that indigenous entrepreneurs are more likely to be shaped by their cultural values and these values are inconsistent with values surfaced in Western entrepreneurship research. When looking at Hofstede’s cultural dimensions for each group, it is clear that there are significant differences. Intriguing elements of the model include a definition of indigenous entrepreneurship that is founded in self-determination and preservation of heritage. Measures of success are proposed to be both economic and non-economic. In addition, family and extended family are acknowledged an important part of indigenous entrepreneurship. Opportunities for establishing a new business are more likely to be founded at a level that benefits the community and more focused on quality of life factors rather than economic profit.

Perhaps the most intriguing element of the model is the idea that a CEO within an indigenous business must manage double the number of relationships of non-indigenous CEO's, including relationships with team, owners, board, family, extended family, and community. This research project used existing research to theorize a model, however, it will be interesting to see if the model is proven through original research projects.

Qualitative study #6. Redpath and Nielsen's (1997) article "Native culture and non-Native culture within management theory" used Hofstede's cultural dimensions to examine management practices within a Native-operated criminal justice organization. This is an example of one case study that does not include any empirical measures of Hofstede's cultural dimensions. Redpath and Nielsen described correlations seen between Hofstede's dimensions for Native Americans in general and for this single Native organization. While this study cannot be considered conclusive, it does support Hofstede's cultural dimensions within a Native context by indicating that indigenous groups tend toward a collectivist orientation. When this collectivism is translated into a Native organization we see the organization's purpose to be tightly tied to advancing the goals of the community. In turn, organizational boundaries are not as closed and these organizations are found to have "a more holistic view of their role within the broader society" (Redpath & Nielsen, 1997, p. 331).

This case study indicates that because the power distance is small in Native cultures, they tend to be driven more by consensus and less by authority; however this not necessarily fully supported in this case study as there is evidence that hierarchical authority structures have moved into the organization. Besides the hierarchy, the organizational communication remains open and flat. In Native organizations "politicking is considered inevitable and accepted part of organizational life" (Redpath & Nielsen, 1997, p. 332).

This study is significant as an example of the correlation between culture and successful management. Native contexts are characterized as having a low uncertainty avoidance, which means that an institution in this context may not rely on rules except those imposed by tradition and may be more flexible and more comfortable with ambiguity and risk. Redpath and Nielsen's (1997) example of the ability of Native organizations to incorporate elements of both Native and non-Native culture into a corporate management style is relevant to my research question.

On the feminine versus masculine spectrum, Native cultures in general and in this case a specific Native organization are considered to reside more on the feminine side of the spectrum due to the fact that as a company, there is more value placed on quality of life factors such as work/life balance, personal relationships, solidarity, and helping others than profit.

Qualitative study #7. The article "Organizational transformation: A case study of two Aboriginal organizations," by Newhouse and Chapman (1996) describes two Native organizations that tried to integrate Native values into their organization. One organization was successful and the other was not. This research project was conducted over three months and included structured interviews with board members, executives, and staff. The interviews focused on understanding the strategy for change, the process of change, factors that influenced this process, and individuals' understandings of the change process. Newhouse and Chapman used a descriptive, holistic reporting format to present the context, process, and content of change, comparing both organizations in each category.

In conclusion, through this research Newhouse and Chapman (1997) have provided an example of the overarching lesson that "interpretive schemes lead to organizational actions which then lead to new organizational structures (or reinterpretations of the same structure)"

(p. 1010). They thus indicated that if there is reinforcement between interpretation and action there will be a process of organizational transformation.

Critique of Mixed Method Studies

Three of the articles I selected to focus on for this literature review are mixed method. The first two are true mixed method studies while the third study is more of a comparison of two studies that looked at a similar question in two related organizational contexts using different research methods.

Mixed-method study #1. The first mixed-method study selected is Tripathi's (1990) "Interplay of Values in the Functioning of Indian Organizations," which describes two studies that "provide comparative data on the structure of personal and organizational values in two types on Indian Organizations and about the factors which were associated with member integration as measured by the degree of discrepancy between personal and organizational values" (p. 721). The first study was conducted in four public sector organizations and the second was conducted in a Multi-national corporation. The first study was based on a survey of 31 proverbs provided within two frames. The first frame asked participants to indicate if the proverb represented their personal belief of their philosophy of life. The second frame asked the same participant if the proverb reflected the basis on which the organization functioned. Statistical analysis was performed using the Principal Component Analysis. Tripathi's analysis yielded 11 factors of personal values, including two based on the Hindu view of life and nine factors in the organizational values portion of the study. The first section of the survey, personal factors, reflected indigenous and universal values. The second reflected personal factors and other factors that fit within work orientation and commitment, power and self-orientation, and individualism. Member integration was determined by the discrepancy between the two

regressed for background variables. Tripathi's study showed "that members who had the experience of work organizations and had received professional education got better integrated within the organization" (p. 727).

The second study addressed in Tripathi's (1990) research is a qualitative study based on interviews across four divisions of a multinational corporation, which found that "Personal values did not vary across divisions very much. Results were confirmed and validated in another later study in a subsidiary of the same multinational" (p. 728).

The idea of measuring member integration by looking at the difference between personal values and organizational values is interesting and useful. It is not clear, aside from the results whether or not any formal connections between the two research studies exist. I am interested as to why the second study did not use the same survey since it is difficult to compare the results from the two different contexts with such different methodologies. The research, rather than being based on a true mixed-method design, seems to be a case where two studies are close on the question they studied and are simply presented together in order to add some additional dimension to the learning from each individual study.

Mixed-method study #2. Rigby et al.'s (2011) "The integration of Maori indigenous culture into corporate social responsibility strategies at Air New Zealand" is a mixed-method study combining a survey with semi-structured interviews. The email surveys focused on, "value, acceptance, usage, engagement and relevance of Maori culture within Air NZ" (p. 122). Additional surveys focused on employee engagement with the culture and availability of cultural resources to employees. Semi-structured interviews were conducted with other organizations with the goal of understanding from their perspective the extent and commitment of Air NZ toward Maori values and practices.

Results showed that employees strongly agreed with the value of integrating Maori culture, that it was a differential factor from other airlines. What is not stated in the study which is a point of credibility is the involvement and acceptance of the Maori in this integration effort. Additional research shows that this organization is owned by the government and although there is a fairly significant population of Maori, 15 % or so, it is not clear if the Maori agree with the content of this material or indeed are at all involved with the integration of their culture into this specific business.

Mixed-method study #3. The third mixed-method study is Liedtka's (1989) article "Value congruence: The interplay of individual and organizational value systems." Liedtka created a theoretical framework of congruence that is then tested in two different organizations using, in addition to a qualitative process, a value survey instrument that provided, "statistical analysis of the consensus around personal and organizational values and the degree of value convergence" (p. 808).

Liedtka's (1989) study found that the:

Value Congruence Model appears to provide a useful framework with which to characterize the nature of the value conflicts that managers face. Conflict of four types were identified. Internal conflict within the individual's value system, usually relating to role conflict, was most frequently described by managers in the study (32% of the situations). Internal conflict within the organizational value system was also frequently discussed (26%). External conflict between the manager and the organization was present in 23% of the situations, and 19% of the cases were characterized by conflict at both levels. (p. 812)

Liedtka (1989) presented the theoretical framework clearly, showing how previous theory, Image Theory, in addition to other foundational research, was used to develop this framework. The combination of two methods, qualitative and quantitative, thus has a lot of potential within Liedtka's study. The research began with the elaboration of a theoretical framework and qualitative interviews at two companies. The quantitative results of the

organizational values were presented as a confirming set of data to help support the description of the context, the organizational values of each company, relative to the qualitative interviews. When looking at the survey data it does seem to align with the study. The survey's direct relevance to the testing of the theoretical framework is slightly ambiguous, however. In addition, the survey measured individual values and the integration of that data into the study is not evident. Nevertheless, Liedtka identified the other challenges of this type of study, including the difficulty of trying to simplify a complex problem with a significant number of variables and the challenge of doing this type of research.

Summary of Methods/Questions and Effectiveness

Methodologically, we have seen some general trends in values research. First, it is important to note that due to the fact that I was interested in a very specific topic, how value conflict is researched within an organizational context, the search was fairly broad. This search included any context where I could see a conflict of values taking place at the organizational level. For instance, mergers/international collaborations, or institutions with religious foundations.

What was immediately evident in this literature review was the fact that there are quite a few studies with several of the elements that I was looking for that informed the overall environment that I need to understand but did not meet the narrow criteria I had set initially. Despite this, the studies reviewed here give a true sense of values research between the personal and the national level. The scope of the research examples is necessarily broad because there were not enough examples of research at the organizational level to provide the material for the literature review. As I completed the research, I discovered, I did need to show this range of research in order to give a true sense of values research relevant to my question, "What is the

future of Native Values in and Alaska Native Corporation.” In addition to delving into specific studies to best understand how researchers have approached topics similar to mine, I also looked at issues within the area of values research.

Issues Related to Values Research

Throughout the literature review, there were several issues identified related to values research from different researchers and other scholarly surveys that are important to note.

Definitional issues. Agreement on and development of shared definitions within any field of research is a constant and ever-changing challenge to all researchers and this case is no different. As is evident in the definition and dimension of values discussion earlier in the chapter, definitions are varied and complex in the field of values research. A clearer understanding of when a specific definition of values applies, perhaps a typology of when to use which definition would be helpful to future researchers.

Issues related to method. Conner and Becker (1994) analyzed “two methodological difficulties often seen in values research” (p. 71). The first is the generation or modification of some instrument quickly to use in the study. Tripathi (1990) created a survey of 31 proverbs from a larger list with no description of how the larger list was generated and or how the 31 proverbs were selected as appropriate is an example of the quick generation of a survey instrument to use in a study. An example of modification of a survey instrument can be seen in the study by Cohen (2007), in which he compiled several valid scales into one scale without any justification of how or whether they would work together. Conner and Becker (1994) posed the question,

Can values instruments be decomposed so that any combination of elements is valid and reliable? Not being psychometricians, we don't know. But we doubt it. Such departures from the standard form of an instrument have to cast doubt on the validity, and therefore meaning, of the findings. (p. 71)

The second difficulty identified by Conner and Becker (1994) is that because values are evident in behavior, researchers should strive to structure their research in a manner that places people in situations in which it can be determined if a choice is values driven. This critique does not seem applicable consistently as behavior is only one area of research related to values.

Fischer (2006) identified a problem with having individuals self-report on these surveys relative to their own beliefs or behaviors, cautioning that we must be careful to ensure that if we are trying to aggregate or create averages of these results we should consider asking “participants to report on the typical or characteristic behavior of most members of the group” (p. 1420). As researchers, we need to pay attention to both of these issues when using surveys in values research.

Level of analysis issues. Finally, there is the issue of level of analysis. As stated earlier and shown through this literature review, values research can be completed at any level from personal to universal and multi-level such as personal to organizational or personal to national. In each case, we are aggregating to understand values at each level of analysis. The issues to be wary of in this domain of the level of analysis, from include misspecification, aggregation bias, cross-level fallacies, and contextual fallacies which are defined as:

This (misspecification) occurs when the phenomenon of interest is studied at the wrong level. Otherwise referred to as “fallacy of the wrong level,” it often occurs when individual-level data are used to represent organizational constructs... This problem (aggregation bias) often is encountered when individually obtained data are aggregated to form the construct of a higher level of analysis... Cross-level fallacies result when a construct is inappropriately assumed to have the same relation at different levels of analysis. In this circumstance, relations or qualities present at a lower level of analysis are assumed to be present at higher levels of analysis. ... These (contextual) fallacies result when hypothesized relations are not studied within the context of higher levels of analysis. The result is that a more global variable that may affect the direction or magnitude of the relation is omitted from consideration. The possibility of this fallacy exists in virtually all research. (Agle & Caldwell, 1999, pp. 365-367)

Latifi's (2006) work is an example of a lack of attention to the level of analysis. The study begins with a foundation in Hofstede's work, which aggregates values at a national level and tries to add enough additional detail through theory development to aggregate at a subnational level. The study by Danis (2003) looked at aggregate organizational values between companies from two different countries only susceptible to aggregation bias from this critique. Liedtka's research (1989) aggregated the personal values of a group and actual group values. Because it is unclear how the personal values are aggregated or integrated into the analysis, this starting bias is compounded. Perhaps the most challenging of these identified issues in values research are the complexities of definitions and comparing studies completed at different levels of analysis.

Relation to Research Question and Implications for Future Research

This literature review serves as the foundation for the development of my own dissertation research utilizing the Ethnographic Futures Research Method to answer the question "What is the future of Native values at an Alaska Native Corporation." To address this question, I consider how values are manifested within an organizational structure. Based on the results of this review of the current literature, using EFR can be considered a unique approach to studying values conflict at an organizational level. Gefland, Nishii, and Raver (2006) stated that :

although the use of values to understand cultural differences has dominated the field, there is growing recognition that new perspectives are needed to supplement this approach." Similarly, Bond (1997) remarked that, "it may be judicious for us to escape the thrall of values in cross-cultural work and augment our conceptual toolkit" (pp. 269-270, 1226)

The unique research model utilized here thus fits into that role as a new tool in the conceptual toolkit. In addition, the EFR approach alleviates many of the potential definitional issues; level of analysis issues; and aggregation issues discussed above by focusing on

generating collectively supported outcomes and strategies. The complex literature review shows literature and research related to but not directly on target for this research project, which was expected; however, the complex review is provided as rich description of the type of research completed that relates to this project and to starkly illustrate the difference between this research project and the research that has been completed previously in this field.

New implications for future research are motivated by an EFR approach. First, EFR as a specific method can be used with a broader set of stakeholders to see if it is useful not only across a corporation but among all the Native shareholders within the corporation. Furthermore, it would be interesting to use the data generated by this method and attempt to work backwards to the values that are being manifested.

In the following chapter, I will describe my proposed methodology, review methodological literature that serves as a foundation for my approach, explain my rationale for selecting the EFR approach, and outline my research protocol.

Chapter III: Methodology

In this chapter I describe in detail how the study has been conducted and the rationale for the selection of the methods supporting and guiding my research, with a further review of the pertinent literature on my chosen methodology, Ethnographic Futures Research. In addition, I discuss why the EFR method is a good way to address and answer the question, “What is the future of Native values at Sealaska?”

Method Literature Review

This section includes an abbreviated literature review on the Ethnographic Futures Research (EFR) method examining its strengths and weaknesses, an overview of effective research in Alaska Native contexts, and a consideration of why EFR is the most methodology for my research question.

Origins of EFR. Robert B. Textor (1995), founder of the Ethnographic Futures Research Method, explained that the idea originated as follows:

In 1976-77, I devoted my sabbatical leave to studying the futures literature, with the express purpose of devising some practical means by which anthropologists could contribute whatever wisdom they might possess to the development of the futures field. This wisdom might consist of a general theoretical perspective on how sociocultural systems change. Or, it might consist of expertise on a specific culture, on the not unreasonable assumption that each culture has special and enduring aspects that require deep understanding if one is to attempt to visualize alternative futures for it-or to help members of that culture to do so for themselves. The result was ethnographic future research (EFR). (p. 461)

EFR is a method that integrates ethnography and futures studies. It is considered as a method in the field of Cultural Futures Research (CFR). Ethnography is characterized as “a close study of culture as lived by a particular people, in particular places, doing particular things at particular times” (Van Maanen, 2006, p. 17). Futures studies are not studies of the future but rather of our visions of the future and are thus informed by our culture, our past, and our present.

Future studies include projections, forecasts, prognoses, and scenarios and are based on the premise that the tension between an unsatisfying present and the vision of the future has the power to generate change.

Overview of the Method

Textor (1995) is proscriptive when it comes to the practice of this method. He has developed a thoughtful process down to the last detail to ensure that the best results are captured from an EFR interview, including four concepts to master during interviews: clarity, comprehensiveness, contextualization, and coherence (Textor, 1995). Additional description is added to these concepts by Annette Squetimkin-Anquoe (2011).

As might be imagined with the above concepts, there is much to consider when entering into a futuristic discussion. In preparation for probing in a non-directive, non-biased manner it is thus important to:

- ask questions when unclear about what the interviewee says (clarity)
- get the interviewee to expand on thoughts that are too narrow or provide more detail on thoughts that are too broad to get a well rounded picture (comprehensiveness)
- ask questions to gain a sociocultural context which includes processes of described changes (contextualization), and
- ascertain the interviewee's reasoning for causes of change (coherence).

By being mindful of Textor's advice, the interviewer is better prepared to learn about the future from the interviewee's story.

The interview itself has four distinct phases. The first phase is to have the participant give an optimistic scenario, the longest scenario, in the context of a future date (i.e., 15 years in the future). The participant speaks as though that future time is the current present which makes

it more vivid and real. The second phase is the pessimistic scenario in the context of that future date. This is a fairly short scenario. Again, the participant speaks as though that date in the future is their present. The third phase is the probable scenario. Here, the participant speaks from current date and forecasts what is most likely to happen if things stay as they are trending now. Finally, in the fourth phase participants are asked to consider what might be done to make the optimistic scenario more probable.

After the interview is summarized, the participant and interviewer work to ensure participant agreement on the final summary. Additional questions may surface during analysis of individual or collection of interviews that may require additional interviews with participants.

Strengths and Weaknesses of EFR

In the context of understanding why the Ethnographic Futures Research method was selected to investigate my research question, it is important to understand the method's strengths and weaknesses. Heemskerk (2003), an author of a similar study melding ethnographic data and futures research indicated that the strengths of this type of research is the ability of individuals to imagine possible surprises, to honor their own worldview, and to provide deep description.

Heemskerk (2003) went on to say that:

First, narratives allow for the inclusion of improbable events that, as history shows, are more plausible than linear extrapolations of current trends. Anticipating surprise is difficult yet important because it can help people take measures that facilitate coping and adaptation when crises do occur. (p. 933)

The quote above aligns with Textor's (1995) idea that one strength of the EFR method is its ability to escape tempocentrism by, "cultivating the 'art of anticipation.'" (p. 45).

Tempocentrism, as defined by Textor, "has to do with our paying too little attention, or the wrong kind of attention, to the future" (p. 45).

EFR is also flexible and can be used to research the future of a whole country, as can be seen in Textor's (1995) work in Thailand, or to research the future of one organization, such as my research on the future of Native values at Sealaska. EFR is also powerful in that it allows individuals to gain clarity on their own desired future, both a pessimistic and probable future, in a systematic and supported fashion. Once this clarity is reached and aggregated across several people, it offers an amazing tapestry of concrete possibility ripe for collective agreement of a shared future.

As with all research based on open interviews, the weakest link in credible and reliable results is the skill of the interviewer. In addition, the EFR method generates a substantial amount of qualitative deep description that must be analyzed, synthesized, and summarized before it can be used to generate a collective vision of the future. Finally, EFR is gaining acceptance but is still relatively underutilized.

Research in Alaska Native/American Indian (Native American) Contexts

In order to understand whether EFR is a good fit for research with an Alaska Native Corporation, first I will review the types of research methods are used in Native American, indigenous populations, considering which methods are effective and the degree that they are appropriate for that context.

Trends in the research indicate that successful, effective research in Native communities is trending toward developing community buy-in, at a minimum, and at a maximum Native researchers building the research with their communities for their communities. Several research traditions are growing from within the indigenous community, research developed and practiced by indigenous researchers. For instance, there is a whole body of work by Linda Tuhiwai Smith (1999) around decolonizing research. Smith gives direction about decolonizing methodologies,

about how to think outside the framework that has been created and embedded by the dominant culture. A second method that is even more specifically targeted to one tribe is the Kuapapa Maori method. Kuapapa Maori calls for Maori researchers to complete research with their community for the benefit of their community (Walker, Eketone, & Gibbs, 2006).

The current literature reveals some factors that hinder successful research in indigenous communities, which goes hand in hand with recommendations of what successful research looks like in indigenous communities. In the following paragraphs, I will attempt to summarize best practices for completing research in indigenous communities.

First, and perhaps most damaging to the research process on all sides, is the existence of “community mistrust because of former scientific exploitation” (Walters & Simoni, 2009). In every indigenous community, there are recent stories of researchers coming in and publishing books without ever checking back with the community to ensure that they portrayed the information they collected accurately. In other communities, distrust includes fear, especially where the community members were used as subjects for medical experiments without their knowledge or consent. In order to address this barrier to research in these communities, it is recommended that researchers take several steps to be accountable to the community. An example of community accountability can be found in the following (Innes, 2004):

An important component of AIS (American Indian Studies, added for clarification) methodologies is for the researcher to clearly articulate how he/she will be responsible or accountable to both the research group and the Native community in general. There are a number of ways that Waldram ensured his accountability to the Elders and Aboriginal inmates. First, he carried out a 'member check' with all transcripts. That is, participants were sent transcripts and given complete authority to change, delete, and add as they saw fit. Second, Elders were sent manuscripts of the book for suggestions or criticism. Third, portions of his research funds went toward purchasing books for one of the prisons' libraries. Fourth, he contacted Aboriginal community members who were knowledgeable about prisons and/or Aboriginal spirituality for input on the manuscript. Finally, proceeds from the book went to the Native Brotherhood's social activities, such as round dances or potlucks. (p. 136)

To summarize, accountability advocates working with several groups to ensure a holistic, collective perspective of the Native community: those being researched, those impacted and knowledgeable about the community and its culture, and, finally, concrete benefits from the research are shared with the community.

Second, there is extensive support for culturally competent research in indigenous communities. From the deepest roots, the framework that holds today's research is the place to begin culturally competent research since research is powerful and can support change. The following is a clear example of this type of support from the Declaration of Barbados for the Liberation of the Indians (Wright, 1988):

The new anthropology called for a radical change in its relationship to Native peoples: In this context, we see anthropology as providing colonized peoples with the data and interpretations both about themselves and their colonizers useful for their own fight for freedom, and re-defining the distorted image of Indian communities current in the national society, thereby unmasking its colonial nature with its underlying ideology. (p. 374)

Research, at its roots, is not unbiased; it is shaped by the culture and worldview of both the researcher and the institutions that have developed the ways we do research. In thinking of a Western framework, we can see how science and therefore a value toward "objectivity" and a belief in individualism have shaped research up to the present day. Culturally competent research in an indigenous community must be developed to understand a collective perspective and a closely connected, complex network of interdependence rather than "objective" results gathered from a distance. Research in indigenous contexts requires a willingness to look at the ideals that frame the proposed research, a willingness to collaborate with community on the research (Christopher, 2005; Walters & Simoni, 2009), acknowledgment of indigenous knowledge (Walters & Simoni, 2009), and an understanding of community and the deep

protocols of respect and behavior that are required to move within the non-homogeneous indigenous communities.

Finally, there is a fairly new trend toward using combined Western and indigenous research processes in research. We have some examples of the Western research tools used within a new framework, a framework that is bounded by the values of the Native community. This might also be called using indigenous values in contemporary research methods. An example of integration of Western research and indigenous values is evident in the Indigenous Interactive Learning System (ILIS™) (Harris & Wasilewski, 2004):

ILIS™ enables contemporary Indigenous groups to engage in systems thinking. ILIS™ recaptures traditional values of Indigenous people, for instance, sharing and respecting diverse perspectives in order to come to consensual decisions, the power of collective wisdom, and honoring each person's right to be heard. ILIS™ has helped bring Indigenous ancestral knowledge, in terms of system thinking, back into our current consciousness. ILIS™ incorporates ancient tribal wisdom into our everyday, modern life. (p. 507)

Traditional indigenous processes are incorporated as a part of research today as well; for instance, healing circles, learning circles, or talking circles (Garrett, Garrett, & Brotherton, 2001). This tool is often used to surface stories or issues in a traditional manner such as it was used at an international indigenous conference on the environment. A circle structure was used with Elders who moderated the conversation from the middle of the room. All 150 people present felt as though their issues were heard over a three-day conference. The group shared their stories and a group of indigenous lawyers, writers, researchers, leaders, and translators synthesized the stories into a document, which was then edited by the group. These two examples illustrate ways in which Western and indigenous research processes may complement one another.

In summary, when completing research in indigenous communities, it is important to be accountable to the community, give back to the community, to structure research such that it is relevant and effective in a collective, complex, and interdependent context with a transparent framework, and to move within and engage the community respectfully in the research process. Finally, it is important to be aware of the new possibilities of combining Western and indigenous tools and methods to develop a research process that combines the validity of well-developed research methods that honor the traditional values of the indigenous context. Based on these tenets of effective research in these specific contexts, it is valuable to now look at how EFR measures against these criteria.

Why EFR

Based on a literature review and ongoing discussions, Ethnographic Futures Research Method has some interesting features. It is based on scenario development, a story-type tool that allows participants to expand upon and add detail to their vision of the future, both optimistic and pessimistic. It allows individuals, especially Native Americans—who in my experience have a tendency to live in the present—to be “present” in the future. With the method, individuals are able to strategize about what needs to be changed in order to move toward that future vision. In addition, it helps the participant conceive of what might happen if things continue as they are or move in a negative trend, allowing urgency to generate toward taking action. Other researchers (Pearson & Gorman, 2010) have indicated that visioning with this population may be useful and quote Groenfeldt, “Groenfeldt [41] puts forward the notion of ‘ethnovisioning’ and says that this is a way that indigenous people can conceive their own futures on their own terms and develop their optimum scenarios of the future” (p. 717).

The tool is developed to encourage participants to bring their cultural worldview into the research process. The process and tools are not offensive to the Native American participants based on the initial experience of being interviewed, as well as from the experience of interviewing others in this group. In addition, there are successful examples of using the EFR method, and the data generated, in a larger context to develop a collective vision and strategy to move toward that future. Groenfeldt (2003) quotes Marie Battiste, who says it can be useful, “to find ways of healing and rebuilding our nations, peoples, communities, and selves by restoring indigenous ecologies, consciousnesses, and languages and by creating bridges between Indigenous and Eurocentric knowledge” (p. 926). Overall, EFR allows cultural and Western worldviews to work in tandem, each supporting and expanding the other.

The Research

Research on my project was completed in two phases. The first phase included individual interviews of 2.5 hours each with a minimum of 13 members from the Sealaska board, executive management, and subsidiary executive management. The second phase is a review of data and development of a vision of what Native values will look like at Sealaska in 15 years.

This research is bounded within Sealaska Corporation, its subsidiaries, and affiliates.

Participants were recruited and selected from:

- The Board of Directors - 13 total, elected to represent 20,000+ shareholders
All members are shareholders themselves. Board members are also well-respected leaders in politics, business, careers/occupations, other Native institutions, and other circles.
- Four officers out of 9 total, but only 4 are shareholders.
- Five Sealaska managers out of 9 total, but only 5 are shareholders.

- Four executives of subsidiaries out of 7 total, but only 4 are shareholders.

More than 50% of all of these potential participants are local and others visit Juneau regularly for corporate or cultural events.

Interview Set-up

I know and have worked with each of the potential interviewees in one capacity or another for about five years and therefore have established relationships to build upon for the research. I am a member of not only the Native community, but of the work community as well; however, given that these interviewees have never seen me in the role of researcher before, the video/audio equipment, as well as the formal interview set-up, may be intimidating or require adjustment.

To begin the interviews, I explained the purpose of the study and reviewed the informed consent documents, reiterating that the material generated from the interview is for use on my specific project. Their contributions to this research has been separated from their identity in order to protect them. Participants are not quoted directly nor have I shared any part of the recorded material, video or audio, without their consent. In addition, I honestly and transparently told them of my own excitement and commitment to my project and express my gratitude and thanked each participant for their willingness to participate and the knowledge they are with me. Each participant received a summary of their own interview and a copy of the final dissertation.

The interview set-up is as close to that offered by Dr. Textor as possible with one interviewer. The steps below were followed. In order to adjust to having one interviewer, I videotaped and recorded separate high-quality audio of each interview. Generating video/audio recordings allowed me to review the interview to ensure that I analyzed each interview carefully and thoroughly. A thorough description of Dr. Textor's process follows based on the materials I

received from Dr. Textor during my training with him on EFR, which are reproduced here with his permission.

Dr. Textor's Process

E.F.R. interviewing reminder sheet (Textor, 2009).

This Reminder Sheet is designed to be used by the EFR interviewer and summarizer/ co-interviewer immediately before, and during, an EFR interview, to provide a step-by-step guide to conducting and summarizing the interview, and especially to the use of charts in doing so.

The physical setting.

The Room: Arrangements have been made for a quiet room, away from the telephone or other distractions, with a table and three chairs, where the interview can be conducted in complete privacy and without interruptions.

The Seating: Interviewer Mike Murray and Co-Interviewer/ Summarizer Pete Parsons invite Interviewee Jane Johnson to sit at the head of the table. Mike, who is right-handed, seats himself at the side of the table to Jane's right, so that he can take notes with his right hand, and be free to use his left hand to point to the various charts that he will soon place on the table in front of Jane. (If Jane is from a culture where it is impolite to point with the left hand, Mike is careful to point with his right hand.)

Pete seats himself to Jane's left, and places the audio recorder close to her. Pete sits far enough away from Jane so that the clack-clack of his laptop does not get into the audio record. Pete asks Jane to "say something" so that he can test to ensure that Jane's voice is being clearly recorded. (From time to time during the interview, Pete might ask for a brief pause so he can check to ensure Jane is still being clearly recorded.)

(If Mike were left handed, the above seating of Mike and Pete would be reversed.)

Equipment: Mike has brought with him plenty of blank paper, pencils and ballpoint pens of various colors, and three or more charts to use as interviewing aids. He keeps the charts face down on the table until time to use them.

Pete has brought his laptop computer, an audio recording device with all needed spare or replacement parts, extension cords as needed, and paper and pens for taking notes.

Jane has simply brought herself—and her ideas, her values, and a readiness to be interviewed.

Setting up the interview.

Mike begins by explaining the general purpose of the interview. He explains that although Pete's primary role is that of simultaneous summarizer, Pete is also co-interviewer, and might ask his own questions at any point. Mike and Pete make clear that the interview is confidential, and that none of its contents will ever be identifiably revealed to anyone—unless with Jane's express written permission in advance. They explain to Jane that anything Jane wants to share with them, they want to hear; anything Jane does not want to share, or is not sure she wants to share, they emphatically do not want to hear. Etc.

Mike and Pete explain that the audio record of the interview will be given to Jane as her sole property after Pete is finished using it, as will the polished summary that Pete will soon produce, based on the Simultaneous Raw Summary.

The Charts: There are two charts that Mike will always use: the "Desirability Scale" and the "Grammar Chart." In addition, depending on how the interview unfolds, he might also use a third chart, the "Domain Matrix."

Mike places the Desirability Scale in front of Jane, and explains as follows. The EFR method asks Jane to provide three future scenarios that Jane herself thinks are possible—regardless of what anyone else thinks. A “possible” scenario is one that has a probability of greater than zero percent. Even if Jane believes that an Optimistic or a Pessimistic Scenario has a low probability—say, two or three percent—it is perfectly OK for Jane to provide it if she wishes. But if a scenario has a probability of zero percent—if Jane considers it to be impossible—then EFR defines it as irrelevant to this interview, and excludes it from further consideration.

EFR assumes that there are 100 possible future scenarios, ranging along a Desirability Scale from Number 1, the least desirable, to Number 100, the most desirable.

The chart shows desirable aspects of the future in green, and undesirable aspects in RED. What is “desirable” or “undesirable” is defined by Jane only. It doesn’t matter what anyone else thinks.

Mike uses a pencil or pointer, and puts it at No. 50, where the chart is half green and half red. A scenario at No. 50 would be an equal mix of what Jane considers to be desirable, and what she considers to be undesirable.

Mike puts the pointer beyond 100 into “Heaven-on-Earth,” at the end point where the scenario is totally green and there is no red. EFR defines such a scenario as impossible and Utopian—and hence irrelevant to the interview. Jane can, of course, conceive of such a scenario, but she judges it to be beyond possibility.

Mike puts the pointer beyond zero into “Hell-on-Earth,” at the end point where the scenario is totally red and there is no green. Mike notes that such a Dystopian Scenario is also defined by EFR as impossible.

Mike now explains the Optimistic Scenario by putting the pointer between 85 and 90, and explains to Jane that this is the location of her Optimistic Scenario. It is not the very best scenario that Jane thinks could possibly occur, but it is nonetheless very desirable—by Jane's values alone.

Now Mike puts the pointer between 15 and 10, and explains to Jane that this is the location of her Pessimistic Scenario. It is not the very worst scenario that Jane thinks could possibly occur, but it is nonetheless very undesirable—again, by Jane's values alone.

Mike and Pete explain to Jane how they will interview her about her Optimistic Scenario, and after that, her Pessimistic Scenario.

Grammar Chart: To get the Optimistic Scenario started, Mike moves the “Desirability Scale” a little bit aside, and puts the “Grammar Chart” right in front of Jane.

Back-casting: Mike explains that the Optimistic Scenario (and later the Pessimistic Scenario) require a new kind of thinking, in which Jane imagines that the Optimistic Scenario has already occurred. Mike and Pete ask Jane to imagine that we are now in the horizon year of 2020. They ask Jane to look back from 2020, and provide an imaginary “historical” account, in broad brushstrokes, of what has happened, and how it has happened. In other words, Mike asks Jane to do back-casting —not forecasting.

New Grammar: This back-casting approach requires that a new kind of grammar must now be used, in which “the present” means 2020, not 2010. Mike puts the pointer on the Grammar Chart at the year 2020, and explains that every statement by Jane about imagined events or conditions in 2020 should be expressed in the present tense (is, are) or present perfect tense (has been, have been).

Mike puts the pointer at the year 2030, and explains that every statement by Jane about imagined events or conditions between 2020 and 2030, or beyond 2030, should be expressed in the future tense (will) or future perfect tense (will have been).

Mike puts the pointer at the year 2010 and explains that every statement by Jane about imagined events or conditions between 2010 and 2020 should be expressed in the past tense (was, were) or past perfect tense (had been).

Jokingly, Mike adds: “There's is a door prize if you can get all the way through these two scenarios without breaking tense.”

Factual versus imagined: Mike explains that every statement by Jane about events and conditions as of the day of the interview in 2010, or before, must be real and factual—while everything after the day of the interview is imaginary (though considered by Jane to be possible). From time to time, Mike or Pete might have to probe to make sure that Jane adheres to this rule.

Dramatization: Now Mike and Pete “move” Jane into the future (to help her transcend tempocentrism) through imaginary role playing. They “meet her again” for the first time in ten years. They note how well she looks, how happy her demeanor seems to be, and how pleased with life she must be. They ask her how things are “today,” in 2020. They ask her how her work is going “this year” (2020), how her family has been doing, what’s new in her community, etc.

Using the charts: There are now two charts in front of Jane, the Grammar Chart and the Desirability Scale. As Mike elicits these first two scenarios, he continually puts the pointer at the appropriate place on these charts, to keep Jane focused. Using these visual means of supplementing oral communication is integral to the EFR interviewing approach, and will greatly improve the rigor and robustness of Jane's interview and summary.

Optimistic and pessimistic scenarios: back-casting from the future.

Elicitation: After this introduction, Mike proceeds to elicit the OPTIMISTIC Scenario, putting the pointer between 85 and 90. “Pretty much everything that could happen to make things go well, has happened—good leadership, good social and political support, good financing, and good luck in general. Tell us about it.” This elicitation process might take two or three hours, or sometimes much longer.

After that, Mike introduces the Pessimistic Scenario, putting the pointer between 15 and 10. “Pretty much everything that could go badly, has gone badly—ineffective leadership, inadequate social and political support, poor financing, and bad luck in general.” This elicitation process might take 15 or 20 minutes, or sometimes longer.

Nuancing: Throughout the elicitation of both scenarios, Mike reminds Jane that in all possible scenarios there is always a MIX between green and red. Even at 85 or 90, there is some red, and Mike will use the pointer to probe for these red aspects, as appropriate. Similarly, even at 15 or 10, there is some green, and Mike will probe for these green aspects, as appropriate.

Such probes for the “minor color” will greatly improve the nuancing of the final summary.

Panoramic to specific: During the early part of eliciting each scenario, Mike asks broad panoramic questions, thus giving Jane maximal freedom to define her scenario in her own terms, and to “take ownership” of it. Until Jane seems to be comfortable in providing her Optimistic Scenario, Mike's probes will be minimal, and mostly just to keep the scenario flowing.

Probing for robustness: As the scenario proceeds, and Jane develops confidence, Mike will feel freer to probe. At first, he will probe mostly to increase the robustness of the scenario, keeping in mind the “five c-s” that are essential to achieving robustness:.

1. **Clarity:** Mike probes tactfully with questions like “What I think I hear is.....” By his questions and manner, Mike tactfully makes it clear that vague statements about the general future are usually of limited value, and that it is usually not too difficult for an interviewee to be fairly specific.
2. **Comprehensiveness:** Mike probes for broad holistic coverage of the relevant sociocultural system(s), rather than, e.g., just about Jane’s particular job, organization, location, etc.
3. **Context:** To help Jane transcend tempocentrism, Mike probes for her perception of the overall context of the situation as of 2020, which will be different from that in 2010. E.g., energy will be scarcer, transportation more costly, society more ethnically diverse, etc.
4. **Coherence:** Mike tactfully probes to learn how Jane's scenario “hangs together” in a consistent and convincing manner, with cause and effect specified at least minimally. E.g., certain economic forces might cause economic groups to restructure themselves, creating political forces that will change public policy, etc.
5. **Comparability:** This “fifth C” applies only in cases where the client is a group to which Jane belongs, and other members of the group have already been interviewed. In such a case, Mike probes to ensure that there is a reasonable comparability between the domains and topics covered by Jane’s scenario and those covered by the other individuals already interviewed.

Saving questions for later: Because Mike is giving Jane plenty of slack to structure her scenario in her own way, there are bound to be questions that Mike would like to ask, but that he decides he should “save” for later in the interview, so as not to break the flow of Jane’s ideas. He

does this by keeping a list of brief memory-jogging notes about areas that might be worth asking her about later, if by then she still has not covered them on her own. Later, as he asks these questions, he crosses them off his list.

Domain matrix: As the Optimistic and Pessimistic Scenarios move forward, Mike gradually does more and more domain probing to ensure that Jane covers, at least minimally, all of the key domains that have been designated by earlier agreement to be essential. For example, imagine that there are seven such key domains, and that the designated driving force is the new information technology. Mike probes to find out how, in Jane's view, this designated driving force will (optimistically or pessimistically) impact the following seven domains:

- Other technology, e.g., by enabling complex Biotech development.
- Energy, e.g. by reducing the need for physical travel.
- Economy, e.g., by enabling new small businesses to be generated and to prosper.
- Sustainability, e.g., by reducing pollution or increasing the use of renewable materials.
- Polity, e.g., by legislatively mandating sustainability practices.
- Education, e.g., by creating a strong felt need for reliable information —and also by enabling creative solutions to this problem.
- Society/ culture, e.g. by enabling positive changes that result in a higher level of general well-being and a more satisfying overall way of life.

If time and the rapport situation permit, Mike and Pete can further enhance their domain probing by placing the Domain Matrix in front of Jane, and using the pointer on it. This matrix cross-lists the seven key domains, and is designed to stimulate Jane to scenarize about the cross-

impacts between a change in one domain, and a change in any of the other six. E.g., a change in educational practice can result in an improved economy.

After Jane has finished her Optimistic Scenario, Mike and Pete introduce the Pessimistic Scenario. They dramatize this by once again “meeting” Jane for the first time in ten years, and pointing out that she seems pretty sad, and that things must have gone badly. Etc., etc. Then they elicit the Pessimistic Scenario, using the charts as needed.

The most probable scenario: a return to normal grammar. The third and final scenario that Mike elicits is the Most Probable Scenario. Mike removes the Grammar Chart from the table, and announces: No more back-casting, and no more special grammar. Jane is now back in 2010, and is now requested to forecast to 2020. The year 2010 now takes the present tense, and 2020 now takes the future tense.

The interview has now reached a crucial point. Mike and Pete take their time and explain patiently that now is a kind of 'moment of truth,' that what now matters is what Jane expects, what is most probable—not what she wants or fears. The emphasis is now upon probability, regardless of desirability. Jane will be “betting her own money with Jimmy the Greek.”

As Mike elicits the Most Probable Scenario, he might, if the rapport situation permits, start by asking Jane to locate the overall most Probable Scenario on the Desirability Scale. Then, as appropriate, he probes for how particular domains will most probably change. Changes in some domains might be higher than others on the Desirability Scale

Raising the ultimate question. Having elicited all three scenarios, Mike is now ready to ask the ultimate question: Broadly speaking, what can be done in the near term, to make the longer-term Optimistic Scenario more probable? Should there be a plan? A program? A change in educational policy? A movement?

At this point, Mike and Pete make an effort to have Jane “take charge” of the answer to this broad question. Pete continues to record her responses.

Closing the interview session. Mike and Pete now conclude the interview and thank Jane appreciatively. Mike picks up the charts and puts them, plus his notes, into his briefcase. Meanwhile, Pete removes the audio recorder from the table, and closes his laptop computer.

Pete explains to Jane that the process of summarization goes through three stages:

- The Simultaneous Raw Summary that Pete records on his laptop during the interview;
- The Polished Summary that Pete prepares by editing and systematizing the Simultaneous Raw Summary. This will typically take Pete several hours.
- The final Edited and Approved Summary that Jane prepares from Pete’s Polished Summary. This might take Jane just an hour or so, or it might take many hours, depending on how much editing, reorganization, etc., Jane wishes to do. Mike and Pete emphasize that Jane should do as much editing as she wishes, in order to “make it her own.” If there is content in the Polished Summary that Jane wishes to expand, contract, document, or delete, she should do so.

“After hours” question: With all their recording equipment put away, Mike and Pete now thank Jane and ask: “Well, how was it?” Etc. Their purpose here is to free Jane up, to encourage her to describe, in her own words, any points that she considers important and might now be willing to talk about—any parts of the interview that were especially interesting or frustrating, any suggestions she might have for improving the EFR interview method, etc.

Mike and Pete now thank Jane again, and maybe joke about seeing her ten years later.

Exeunt Mike, Pete and Jane.

Guiding Questions

As the Interviewer, I created and outlined a series of guiding questions that are not a part of Dr. Textor's process. During my pilot of the EFR method within the community, I discovered through my review process that I had a bias weakness in my interviewing ability. I developed these guiding questions so that I wouldn't struggle to find the right words during the interviews and ensure that I was able to ask deeper questions in a manner that was not leading or directive. In addition, these questions included examples of questions asking for symbols or metaphors that supported use of visuals or other media that can be used in the collective meeting. I did not use each of these questions with each interviewee but used my list of questions as a guide or reference and used questions as needed or as models for building new questions.

Table 3.1

Domain Matrix

		Domain Matrix						
		Demographics	Technology	Energy	Economy	Environment/ Sustainability	Society/ Values	Political Support
↓	Demographics							
	Technology							
	Energy							
	Economy							
	Environment/ Sustainability							
	Society/ Values							
	Political Support							

Contextual:

- The overarching dissertation question is, “What do Native values look like at Sealaska today?”

Demographics:

- It seems that demographics in this region have changed, is that your sense? What is different? Please describe the changes at the village level, and at the shareholder level?

Technology:

- What values are evident in the use of technology? How would you describe values in the use of technology?

Energy:

- In 2011, energy was a major concern in the region, in your estimation, what, if anything, has changed?
- How have those changes impacted Sealaska’s values in action?

Economy:

- How has the national and state economy impacted Sealaska?

Environment/Sustainability:

- Can you provide a metaphor that will illustrate the relationship between Sealaska and its resources as it is today? Would you have given a different metaphor in 2011?
- If a metaphor doesn't come to mind, what is the most important issue that you want me to know about in relation to Sealaska's view and use of resources?

Society/Values:

- It sounds as though you are very passionate about _____. Can you tell me why that is so important to you?
- Where do you see Native values in action at Sealaska?
- Are those values practiced in other places?

Political:

- Infrastructure/Relationship between Tribes and Corporations were complex and layered in 2011, what is the status of those formal relationships? If you could choose one image to relay what this relationship is today, what would you choose?
- Describe the relationship Sealaska has with other entities. Have these changed over the last 15 years? Why or why not? What prompted the change?
- Are there other relationships that have changed over time that are important to discuss?

Transcription, Analysis, Participant Review

Transcription was accomplished, word for word, using MacSpeech Scribe and professional transcription services. During the interview process, a good audio recording was

taken and a profile created for the voice of the participant. The software translated the audio. At that point, I edited the transcription to ensure that it was correct. The transcription semi-automation process decreased the transcription time down to about one-third of the usual processing time. The transcript was then summarized per Dr. Textor's process and sent to the interviewees for review, edit, and approval.

Thematic and Innovative Analysis Identified

All of the interviews were analyzed for themes within each scenario and across the data. The five most important strategies for change were identified and consolidated.

Each of these perspectives on the data were compiled for sharing in the larger group meeting. The larger meeting was a four-hour session with several people from the larger group, some completed the initial interview and others hadn't. This group participated in the second portion of the analysis. During this meeting, we, through collectively reviewing the data, assessed alignment of the responses as well as identified and prioritized outcomes that we, as a group, can support as part of Sealaska's strategic plan. The meeting process was as follows:

- Allowed all individuals to experience the process of creating scenarios through an abbreviated process.
- Reviewed of analysis/themes/strategies—presentation of data using PowerPoint.
- Gathered feedback on analysis, identified whether information was reasonable and whether anything was missing.
- Discussed strategies for moving probable scenario to optimistic scenario, voted for priorities and identified areas of agreement (specific themes, data or strategies) using a voting process.

We discussed these items over food and spent the time necessary. This is in alignment with our Native values; we share food and celebrate as a part of almost all group processes.

Chapter IV: Analysis Process and Data Summary

This research process produced results that are different than I expected when designing this dissertation project. The process revealed the innovation, creativity, and lack of alignment of those interviewed. After completing the process, I find I am more optimistic that Sealaska will find the alignment and collective vision it needs to reach its goals. This chapter will describe the research analysis process, categories of data developed during the interview and analysis process, and a detailed summary of results of analysis by category.

I hoped that this research, completed initially as a pilot and then in two stages, the first consisting of interviews with individuals and the second a group meeting to review results, would help to identify agreement among stakeholders on a strategic vision of Sealaska's future, a vision that would include concrete details of what that future looked like. From that vision, I expected to begin to see how Native values will be a part of Sealaska's future, not through any negotiation on the definition of values, but on the concrete manifestation of values in a chosen picture of the future. Unfortunately, this was not the case due to a wide range of factors; among them the reality that the interviewees were not yet aligned and committed to a single direction. I see the potential to reach this ideal through additional meetings within Sealaska, yet such meetings were not planned as part of this research and therefore a clear future has not been defined nor accepted collectively. This process has not reached the end point I had originally hypothesized could be reached when designing this research project.

Nevertheless, the data gathered offers some key findings, including themes, agreement on description of desirable future conditions for Sealaska, identification of barriers to success, identification of areas where agreement is less likely, and, finally, a sense of strategies that will most likely move Sealaska from the probable scenario toward the optimistic picture of the future.

Additionally, I have enough data make some preliminary statements on the values that are reflected in that future.

Research Analysis Process

The research process included interviewing 13 individuals who ranged from shareholder to staff level employee to management level employee to board members. These interviews were from 1.5 hours to 2.5 hours in length. Two interviews were completed as part of a pilot study. The data from those interviews will not be included in the internal interview project, however, a few comparisons between those initial interviews and the remaining 11.5 interviews will be added to show a flavor of the perceptions of shareholders not employed within Sealaska. I am counting the total interviews completed as 11.5 interviews because one person completed the optimistic but not the probable or pessimistic scenario. Although only 11.5 interviews out of the 13 total participants were completed due to schedule conflicts and technical difficulties, based on the data, there would not have been significant differences with the addition of those two interviews. Each interview was transcribed and summarized. Interviewees then approved the summaries. In turn, the summaries refined domain definitions and created categories within the larger data set. These summaries were created in a software program called The Personal Brain, which allows for visual mapping that can be tagged and viewed in different ways. This allowed for tagging with keywords so that I could sort across the pessimistic, optimistic, probable, or all three areas either in one domain or one main category within the interview. For instance, I looked at all the optimistic, pessimistic, and probable data on Sealaska Heritage Institute to see trends across all areas. When looking at business, it made sense due to the amount of data to look at this data by type of scenario so business, optimistic, and then business, pessimistic, and so on.

Once all data were summarized, the consolidated summary was refined down to a smaller generalized set of data that was shared with a group of individuals to confirm that the results seemed correct. The group was composed of both those who had completed the interview and those who had not. Each general area of data was discussed and the group, through practice with the method, discussion, and questions, indicated whether the data shared seemed out of line with their understanding of the future of Sealaska, identified gaps in research or strategy and gave general feedback about the findings presented. Additionally, a discussion of a subset of the data from the company's subsidiary Haa Aani, was shared at an Executive Committee meeting just to ensure the data that I am working from was not out of alignment or does not have any gaps. In outlining this project, I expected to prioritize and identify further alignment by presenting themes with this group, however, because the categories and subcategory and thematic data were too disparate, I worked with the group to make sure that the data I had seemed correct and truly reflected the organization.

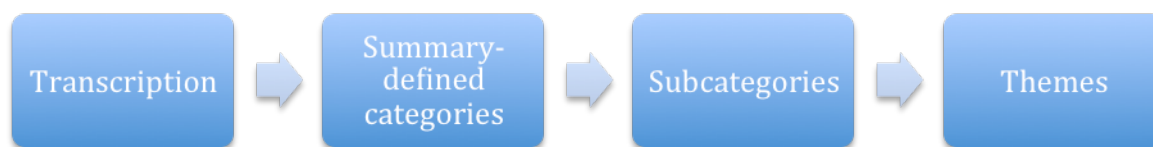


Figure 4.1. Analysis process.

Summaries—Categories Defined

Data across the interviews fell into several areas identified when building each summary that are roughly aligned with the identified domains of energy, environment/sustainability, and social and political support. The main categories of data identified across interviews, as identified and confirmed, are: Board, Business, Context, Culture, Haa Aani, Land/Environment,

Political, Shareholders, and Social. Most category level data fell into the areas of Business, Context, Culture, Haa Aani, and then there was detail and description in the areas of Land/Environment, Political, Shareholders, and Social. It is important to note that much of the data are interconnected across multiple domains or categories. For instance, a person may talk about values in a way that might be more relevant to the Tlingit culture, or present a statement of how that value was relevant to a business choice. In these cases, the data was placed in the category within the summary that was closest to the topic of the paragraphs around it. For example, when values were discussed in the sense of using values to evaluate which business areas to enter or exit, that data was placed in the Business part of the summary. I used this practice consistently to manage and track the context of each statement that became part of the summary and therefore part of the overall category and theme analysis.

Business category. The Business category describes Sealaska as a business. Interviewees described the business footprint including location, size of business, types of business, and description of Sealaska as a whole, as well as the company's capacity. Capacity within this study captures, in a broad sense, the capacities that Sealaska has as a company from the employee to the company level and how those capacities were developed or other descriptive data about capacity. Capacity is a significant point of focus in most interviews. This is clearly an area of passion and alignment across Sealaska.

Context category. Context data illustrates the details of the context that exists around Sealaska in these scenarios at the corporation, regional, and national/global level. Interviewees had a lot to say about the region and provided a lot of rich description in this area. Data placed in this category described what the region looked like in detail and discussion about how or why their vision of the future of the region developed or did not develop as they hoped. In addition,

this category holds data that is not tied directly to Sealaska, Haa Aani, SHI, such as description of villages, population changes, and other similar data that cannot be directly attributed to any Sealaska or its affiliates directly. The Context at a national/global level indicates factors that impact Sealaska or the region. For example, as people describe their pessimistic scenario, one trend was agreement upon an overall declining economy and a decline in federal funding to specific programs. This type of data is collected within the national subcategory of Context. Corporate context holds description at the corporate level about any items not directly related to capacity or business that provide insight into what the context looked and felt like through these different scenarios.

Culture category. Culture, as one might imagine in this type of study, is important. Data in this category included SHI (and scholarships since that is a function of SHI and most interviewees kept this linked), language, celebration, and other culturally relevant ideas.

Haa Aani category. Haa Aani, a subsidiary of Sealaska dedicated to working on economic development in Southeastern Alaska, is another category that was an important point of focus of many of the interviews and summaries. This category holds data that is tied predominantly to Haa Aani and more distantly to Sealaska. Haa Aani came across in the interviews as both an exciting purpose-driven subsidiary around which there was a lot of optimism and as an entity that has many opportunities to fail based on the perceived extensive barriers to success.

Land/environment, political, shareholder, and board categories. Land/Environment holds data on the land bill and use of Sealaska lands and those changes over time. This includes ideas for use of different types of parcels received in the land bill. The Political category captures the level of engagement in politics by Sealaska and whether this changed in each

scenario. Shareholder and Board holds data on how Sealaska looks to these stakeholders and what might have changed within these stakeholder groups. Social holds data related to Sealaska's relationship with other tribal entities and how these have changed over time.

After creating each summary, I added each summary statement into the software application. Those summary statements were mapped, pulled from the program so that alignment, variation, or disagreement could be ascertained. Numbers and not individual names are associated with summary statements within the software so individuals are not tied to the sets of data extracted. I went through each data set in order to cluster similar statements and name them. I tested these names, as subcategories, across the data and those that remained in the final set at the end of the process held the data most consistently. The following pages strive to give an accurate flavor of the sense of the responses I received in each category and subcategory.

Sealaska as a business. General overall themes about Sealaska as a business were interesting across all three scenarios. As is typical of this type of interview, there is significantly more data in the optimistic scenario than in the pessimistic and probable scenario. An important idea that is prevalent throughout all interviews is that Sealaska will continue to exist in some form no matter what goes wrong in the next 15 years and will continue to act as a social entrepreneur in addition to being a for-profit corporation. As indicated in the article by Pearson and Helms (2013), a social entrepreneur has "an ability to leverage resources that address social problems" (p. 59). Most probably Sealaska will continue as it is with some small amount of incremental growth and a few successes. The swing in this scenario is broad; however, it is clear that 7i (a complex formula of shared resources from other regional corporations meant to distribute income from natural resources across regions fairly) reliance is expected to be a large part of maintenance of the company's performance or any level of growth. Optimistically,

Sealaska will become a model of how Native values can be integrated into a company. That is the general trend across all three scenarios.

The data in the “Sealaska as a Business” category also falls into several general subcategories across scenarios, including additional descriptive data of Sealaska’s business in general, its business in Alaska, its business outside of Alaska, and how values could be integrated into the business. Since values are such a large part of this research and not bound by the business itself because they extend to include communities, tribes, and shareholders, my discussion of values is later toward the end of this chapter.

Business in general. The interviews produced significant results about business in general at Sealaska. Much of this feedback pointed to the fact that there is a trend toward the balance of Sealaska business changing over time. Many respondents upheld the assumption that there will be more business in Alaska in the future, although investment in business outside of Alaska is considered a requirement for success. Respondents anticipate that Sealaska will become a business known for doing the right thing, working in value-added business like marketing and out of industries like manufacturing in a flexible, adaptive manner. The results of this study indicate that Sealaska has become a company that can plan ahead to be ready to enter the market rather needing to catch up.

Business in Alaska. Alaska business interview data falls into three areas Tourism, Resource Development, and Energy. Although this data captures efforts that are taken by Sealaska specifically, more of this same type of data is found under Haa Aani as that entity is seen, by most interviewees, as the entity that will carry out this type of work in Alaska on Sealaska’s behalf.

Tourism ideas exist in the probable and optimistic scenarios. In the probable scenario, tourism is an area that respondents felt there will be both expansion and barriers. It will thus be important to ensure that skilled labor is developed as well as a network that can serve the market. The optimistic scenario indicates that ideally tourism will function as a mechanism for the integration of culture into these businesses and thus ensure that the businesses created are in the higher-end niche market.

Alaska resource development is another typical aspect of the Alaska business scenarios. The timber industry has a pessimistic future for Sealaska as the company will likely no longer have a role in this industry. On the other hand, most perspectives in the probable to the optimistic summaries indicate that sustainable timber industry operations are a possibility. There is an acknowledgement that in order for timber to become a sustainable operation other actions will be needed such as creating a coalition or accessing other timber in the region perhaps through working with state and federal landowners. Timber operations will necessarily be much smaller than operations present day. Respondents indicated the mining industry as another area of interest that in the pessimistic scenario is depicted as either being delayed or in decline, in the probable scenario as being slowly developed, and in the optimistic scenario as being further developed with sustainable, environmentally sound practices.

Possible solutions to the energy issues in this region, especially in remote villages, seem to fall more toward the impossible. The optimistic perspective on energy development is that we partnered in developing a few energy sites. As we move further into this chapter, we will see that energy solutions are more connected with Haa Aani than with Sealaska as the parent company.

Business outside of Alaska. There are two main topics in this area: first the size and scope of businesses owned by Sealaska and second the impact of Small Business Administration (SBA) 8a on Sealaska. There is a clear sense that most of Sealaska's business will be outside of Alaska and that the scope of Sealaska industries will be smaller, optimistically this will happen under Sealaska's direction and choice. The topic of SBA 8a opportunities was a clear area of interest in which respondents expressed a variety of feelings about the program. Some questioned whether the 8a program will continue and whether this is a type of business that will really be profitable going forward. Importantly, there was clear agreement among respondents in the optimistic scenario that all future Sealaska business will likely be able to compete without special advantages such as the 8a program.

Sealaska business capacity. Business capacity, for the purposes of this research, as I wrote previously, is defined as, "the capacities that Sealaska has as a company from the employee to the company level and how those capacities were developed or other descriptive data about capacity." Capacity, of people, decreases significantly in pessimistic scenario; with the number of employees expected to go down to about 50% of employee count of 2012 and the total compensation with benefits below median, resulting in a flight of talent from the company. It seems probable that there will be a clear development path for all employees as well as senior leaders. There is a significant amount of engagement on the optimistic scenario, ideas are specific and fall into subcategories of organizational culture, values, leadership development, and the capacity of both individuals and the company as a whole.

Respondents described the culture at Sealaska as familial, inclusionary, supportive of gender parity, and respectful. Employees are described as having extensive training on culture, values, history, as well as benefiting from a custom management system built on values in action

and lean tools. Leadership continues to be a focus within the company, which is known for developing people earlier and earlier in their education and providing opportunities for employees to broaden their experience at Sealaska. Evidence of Sealaska's focus on capacity is apparent in the company's documentation of the skill base and career aspirations of all Sealaska shareholders and descendants and the development of opportunities aligned with that information. Sealaska has historically focused on building skills in value-added areas such as marketing. The company also focuses on building capacity when working with partners, most of whom are asked to support this goal through the partnership agreement. The company measures success according to the increase of employment of highly qualified Tribal Member Shareholders. Hires are made based on experience, education, skill, and willingness to learn our culture and history to avoid encouraging an entitlement culture. Sealaska chose to develop businesses where it had shareholder capacity or could build that capacity quickly.

Sealaska became proficient at hiring experts who mentored our employees to succeed and then moved on. The number of staff at the company's headquarters has leveled off and is presently about 20% less than 2012 levels. Most of the respondents' discussions of capacity pertained to Haa Aani, which will be discussed in the next section.

Haa Aani, Sealaska's Unique Social Entrepreneurship Engine

Haa Aani, Tlingit for "Our Land," is the newest Sealaska subsidiary created to work on behalf of the Southeast Alaska Region, specifically on rural economic development. This is partially achieved through the creation of a Community Development Financial Institution to help fund entrepreneurs in the region and to advocate for public policy in support of economic development in the region either by committing resources or removing barriers to development. Finally, Haa Aani invests in community business in partnership with local tribal entities with the

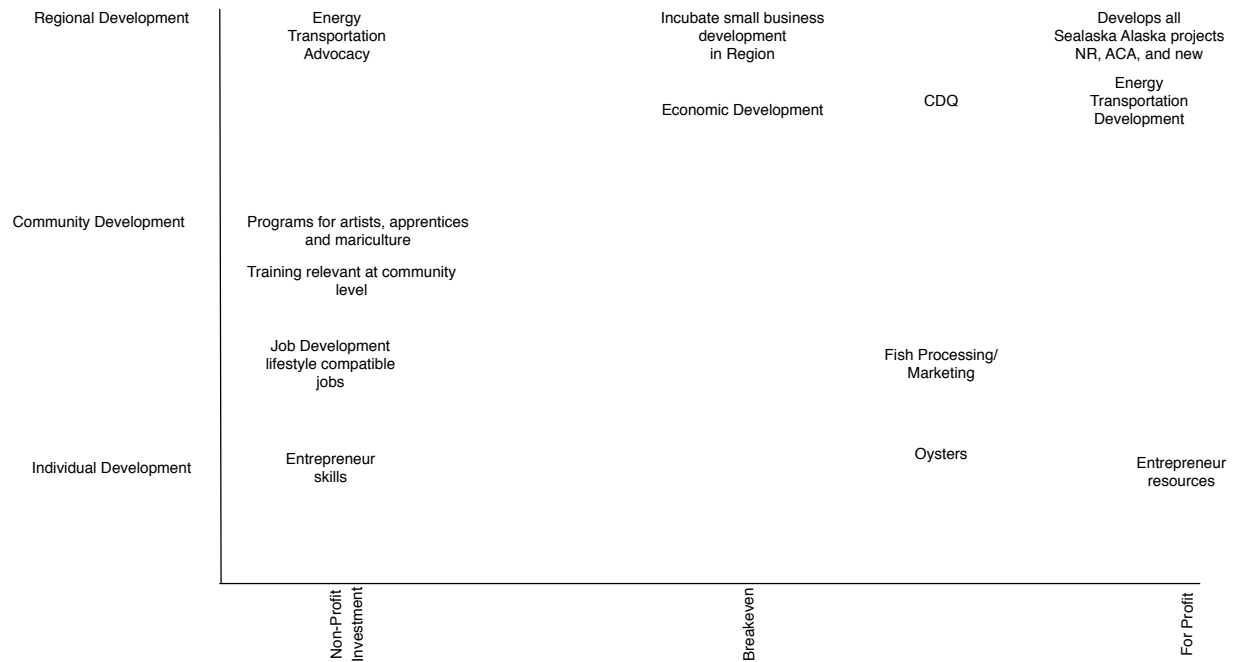
intention of building self-sustaining enterprises. The next few pages will show the range of response around this new, small, and innovative subsidiary from the optimistic perspective. These responses fell into several general areas such as the business model Haa Aani was founded on, the company's focus, its capacity for promoting development, and finally how it might measure its own success.

Haa Aani Business Model

Respondents' descriptions of the Haa Aani, LLC (HAL) business model reflect a lack of consensus on the purpose and structure of the entity. Interviews indicate a broad range of ideas from the idea that Haa Aani is not required to make a profit, to it functions as an investment vehicle or social entrepreneurial enterprise, to it must be at least profitable enough to cover salaries or it is not sustainable. In addition, the purpose of Haa Aani was described as to "save the villages," "give a hand up not a hand out," to serve as a "model of values in action within a corporate enterprise," and to grow resources and grow capacity. In addition respondents expressed differing opinions as to whether HAL should work on advancing community development, creating jobs or lifestyle compatible jobs, managing all Alaska development, and/or developing entrepreneurs. Figure 4.2 expresses the idea revealed in prior sentences that there is a fundamental lack of consensus on the appropriate model for Haa Aani. The below table illustrates the range of non-profit to profit and individual focus to regional focus seen in the interviews.

Table 4.1

Multiple Perceived Purpose and Models of Haa Aani



Haa Aani Focus

In general, respondents did not characterize Haa Aani as focused in 2012 and offered several suggestions for how to ensure Haa Aani finds its focus. There was even a recommendation that Haa Aani become Sealaska’s only priority fund for purpose initiatives. Interviews offered three specific recommendations to help Haa Aani identify its focus:

- 1) provide additional human and financial resources;
- 2) help its partners create a clear idea of their vision;
- and 3) ensure that both Haa Aani and any partners are clear about their respective roles in the overall corporate atmosphere of Sealaska.

In 2011, much of Sealaska’s Executive capacity was focused on ensuring that Sealaska obtained its final land entitlement of 70-80 thousand of acres of land from the Federal Government, hereafter called the “landbill.” After successfully completing that endeavor, more

resources were dedicated to Haa Aani in the form of appropriate staffing levels with appropriate capacity, additional financial support, and additional focus of board and executive team on Haa Aani initiatives once the landbill was completed. Executive focus on HAL ensured it received the resources and support essential for HAL's success.

As a result, Haa Aani implemented several ideas around process that created a foundation for success. HAL focused on areas of strength among Native people. In addition, it focused on issues not from the perspective of dependents, but rather as people starting out from a position of power and privilege who can succeed with those gifts if they hold one another accountable. They facilitated community collaboration based on vision, data, values, and business principles. They spent the time to understand the full scope of a goal and what it would realistically take to reach that goal.

HAL supported a clear vision and provided role clarity. They partnered and shared responsibility. In doing so, HAL clarified their own role. For example, HAL provided business, legal, and policy expertise and additional access to a strong political and non-profit network. Haa Aani thus became determined to focus on how to build on current strengths and how to remove the main barriers to growth. Each of these is described in more details in the next few paragraphs.

Areas of opportunity built on strength in the company include bringing a small number of jobs connected to current subsidiaries into the region and growth in ocean-related industry as well as tourism and art. Some subsidiary jobs are brought to Alaska to add to regional assets such as timber, Haa Aani, or aggregates.

Respondents expressed a high level of optimism with respect to mariculture, which includes expansion to about twice the current volume of oyster business and international brand

recognition of mariculture products like oysters and wild seafood. The region's various natural resources, including mariculture, fishing, fish farming, and other sea-related farming like seaweed, are sustainable and can be owned collectively. Interviewees discussed business models for HAL, for example one model began with HAL providing seed money and business expertise to community level businesses and over time moving out of the operation and only being involved in the marketing aspect of the business. Industries chosen for investment, such as mariculture, offer lifestyle compatible jobs and the potential to support a lot of families. An example of this is the oyster business. It is very successful and is only limited by the area around each village that supports the farming of oysters. Initially HAL provided seed money and marketing, and now it is a cooperative model owned and run at the village level. Sealaska still markets these oysters and continues to provide seed money and expertise/training for additional profit. Oysterfest, the annual July festival in Juneau in partnership with local restaurants, is successful due to the growth in this industry.

Tourism and Native arts were another focus of Haa Aani in terms of supporting development of artists through training and the Community Development Financial Institution (CDFI) created to support entrepreneurship in the SE Region. Due to these efforts there is now an art cooperative. Larger business in community brings more small "mom and pop" business to communities as each village has its own niche tourist market such as ecotourism, guiding, or other village activities.

Barriers to growth in the southeastern region included energy and transportation. Haa Aani addressed these issues through private and public partnerships on account of its political will and financial resources. Progress was made on finding renewable energy solutions that made living in rural Alaska easier and cheaper.

In the last 15 years Haa Aani has focused on building two types of capacity: community capacity and internal capacity. Community capacity is the growth of expertise and experience at the community level. HAL made rural communities more sustainable through training, with grant funds, relevant to community-level industries such as growing expertise as entrepreneurs among artists or oyster farmers. In addition, capacity was developed by offering support in the form of scholarships in targeted areas deemed to be desirable for the long-term financial health of the community.

Significantly, HAL has developed its internal capacity over the years to ensure it can meet its unique mission. HAL struggled initially as it had to become fluent in investments and engagement at the community scale. Over time it gathered a specific set of resources and expertise including dedicated resources to manage each program, expert fundraisers, and global research expertise in targeted areas such as mariculture and energy, as well as developing community organizers that lived and worked in each community who were skilled in business and had experience in helping people/communities find their own best measures and empowerment for success. Because Haa Aani and Sealaska learned to work differently with communities through an emphasis on partnerships, communities now trust that local interests will be respected.

Measuring Haa Aani Success

HAL worked hard to create ways to measure its success based on several categories: through its own sustainability; through its reputation; through statistics pertaining to communities, including population, number of businesses, and health; through the amount of capacity built at the community level, number of projects completed successfully; and HAL's progress on barriers such as energy and transportation to sustainable communities. Sustainable

communities are defined as those communities that could sustain themselves without federal, state, or Sealaska/HAL support. Communities also work with HAL to define long-term return of projects and determine if the investment was profitable based on income and other factors.

Pessimistic characterizations reflected concerns that HAL could not bring enough people together to make meaningful change in an environment of decreasing resources. Due to financial constraints, Sealaska had to stop supporting HAL so all support came from federal, state, and philanthropic sources. Haa Aani had to transfer village initiatives over to villages, most of which did not succeed. HAL was not able to have an impact on energy or transportation issues in SE. Haa Aani was able to develop some entrepreneurship, resulting in careers among a few people who are successful now. Some felt Haa Aani would close after some time and others felt it would stay the same as it was in 2012.

Haa Aani will not have funds to invest and will not get reimbursed for investments it makes. Over time the oyster/mariculture (including Quota) business will grow. There is a sense that HAL will not succeed if it continues as it is. HAL is trying to do too much, too fast, and the vision is too vague. HAL will not be accepted unless Sealaska and Haa Aani learn a different approach to the business with communities.

Context

Context helps to illustrate a picture of a few key descriptors that help add texture to what is happening around Sealaska. This section outlines how participants described the context at the corporate, regional, and national/global and helps to connect and anchor ideas provided in other parts of the scenario.

In the optimistic scenario, interviewees offered a lot of ideas in the corporate and national context and the most ideas in the regional context. The corporate context is described as being

impacted by the increase in shareholders based on lineal descent rather than blood quantum. There are more employees in the company overall, the average age of employee is less than it was in 2012. The employee profile shows experience and educational attainment is similar to any other corporation. ANCSA corporations have established a challenging externship available across all companies. In addition, Sealaska has a very different reputation, one of being able to accurately convey the purpose and ways as a company as well as a company with a culture of inclusion and respect. 7i helped Sealaska survive through critical periods.

At the global and national level, respondents provided details in the area of global economy, the environment, some key descriptors of the United States at the national level, and some impacts at the federal level. China is now the biggest economy in the world. Environmentally, global warming is advancing, bringing special opportunities and challenges. Nationally, we are seeing more influence of immigration on the features of the population. Homelessness, unemployment, and other negative factors are declining. People are better prepared for retirement and there is a decline in medical costs.

Optimistically, interviewees offered the most engagement around the regional context. Regionally, shareholders reflect the nation due to intermarriage; shareholders are still predominantly located in the Pacific Northwest. Shareholders are better prepared to start their own business. Population is an area of description. Most feel that a lot of small villages suffered a lot of outmigration but noted that this trend has stopped over time. Some feel that people have begun to return and there is even a feeling that it has come back up to the level it was during peak fishing in the 1980s. Sealaska is seen as working with other Alaska Native Companies, Tribes, and other Native organizations, all of which are seen as being more successful. Energy is a very large topic that reflects a wide range of ideas, from Sealaska being an independent power

producer to this being a large cooperative project between public and private entities. The energy situation in all rural villages is seen as alleviated at some level.

The region overall is described in rich detail. People are better off although population has declined a slightly, poverty is at lower level, health is better, culture is a focus with longhouses, art, and language, and communities are thriving based on investments in business including fisheries and tourism. Success is based on education, mentoring and training, healthier families, and healthier communities.

Villages are described as having seen an increase in per capita income, having more jobs, accessing energy at more reasonable rates, and having better relationship with Sealaska, along with other positive indicators across the board. Overall at both the regional and village level there is a pride of accomplishments since the community and not the federal government completed these achievements.

The pessimistic context scenario received the most interest at the corporate and regional level, with only one comment at the national level. Descriptions at the corporate level indicated that performance is not at the level it was projected to be, but that positive progress is being made nevertheless. Factors that have a negative impact on performance include the fact that Sealaska will always be affected by the lowest common denominator in the tribal populations, the decline of business forced a decrease in Tribal Member Shareholder employment in Alaska, and 7i is almost exhausted across all regions and now only contributes a few hundred thousand dollars per year. The national context is described as being much worse for those at the lowest economic level as the economy continues to decline. On a positive note, there are more shareholders who are educated.

Regionally, the business and social ecosystem is interdependent and fragile, if one part fails there is a broad negative impact. Villages are difficult places to live with the outmigration, lack of business/jobs/opportunities in part due to high costs of energy in villages, changing climate, and declining access to subsistence resources. Factors contributing to the regional issues are a lack of a commitment to education, federal and state governments are struggling financially and are thus unable to help, and poor coping methods, many of which are unhealthy and contribute to more issues in the villages. On a positive note, overall health trends are getting better and a few energy projects have been developed.

Context, in the probable scenario, indicates limited data at the national/global level and more interest at the regional level. Nationally, the trends in China will impact the world and the economy will be volatile and unstable. Regionally, some communities will succeed and others will fail. An important factor in failure is whether community, tribe, and corporation can work together. Population will decrease overall in the region and there will continue to be relocation to urban areas.

Board

The board category reflects perceived differences in the board or how the board will change over time. This category is important, as this is the leadership for Sealaska and board members have the ultimate responsibility to ensure Sealaska is achieving its vision and purpose.

Optimistically, interviewees felt the board would be younger on average and made up of members with significant business experience relative to other large corporations. The Sealaska Board is disciplined about financial sustainability, is careful to leverage resources, has fostered a culture of and skill at having difficult discussions, has values and business filters used in decision making, and maintains its commitment to the decisions it has made. Finally, it models the

behavior it expects from employees around respect, fiscal responsibility, and values in action.

The sense of what would happen to the board in the pessimistic scenario is that there would be a lot of turnover on the board based on the perceived poor performance. There would be recall efforts and there would be a lot of dollars spent to deal with these attacks. Native values do not have a lot of support at Sealaska. There is a sense that the board itself could be forced to decrease in size due to financial concerns or not be paid. There is a fear that choices might continue to be made without regard to financial constraints.

There is not a lot of input on what will happen with the board most probably except that there will be a transition over time and the average age of the board will be lower. There is a sense that the board will continue to be perceived as not modeling the behavior they profess.

Shareholder

The optimistic scenario from the perspective of shareholders includes three subcategories: benefits, alignment with Sealaska, and a picture of what the future looks like. Benefits are described as increased dividends, new programs such as a special program for elders, increased employment opportunity, significant support for education, and providing all benefits for a larger shareholder base. Shareholders from around the world are connected to this as their land culturally and symbolically.

Sealaska has been working on aligning shareholders with Sealaska through communication and transparency. Shareholders now have realistic expectations of Sealaska and see changed corporate values along with the efforts Sealaska has made to change the relationships with villages and shareholders. This in turn is a reflection of the investment Sealaska makes in shareholders. Opinion data shows this alignment; Tribal Member Shareholders have pride and are happy to stand with Sealaska.

General descriptions of the shareholder base refer to changes in shareholder base, point to an increased return migration of shareholders to Alaska, note that the shareholder base is better educated on average, and indicate that more shareholders are comfortable making financial investments now that shares are available to lineal descendants.

The pessimistic scenario describes shareholder benefits and alignment. Benefits range from giving one-time large payouts to losing the permanent fund to New Natives not receiving any dividend. Alignment is similar to the present-day situation with a comparable number of shareholders who are unhappy with dividends and a percentage who are okay with dividends and happy when pursuing opportunities with Sealaska.

Shareholders were described in two subcategories in the probable scenario: benefits to shareholders and shareholder alignment with Sealaska. Respondents feel that benefits will remain similar to current benefits, with the exception of dividends, which may decrease. Some shareholders will remain dissatisfied because they cannot see visible change. Alignment will likely remain as it is. Some shareholders will continue to be disgruntled and this group will grow.

Land/Environment

Optimistically, a clear majority feel Sealaska will get most of what it is asking for in the landbill in congress, this is the remaining 70-80 thousand acres that Sealaska is entitled to under the Alaska Claims Settlement Act of 1971. This land may stabilize Sealaska going forward. In terms of a timeline, there is a sense the landbill could take up to five more years to complete, which will require people's time and Sealaska's financial resources. Not all feel it will be a good thing but rather that it end up a "mixed bag" as we will not get what we expect, it will cost more than expected, and the business could suffer due to the attention it continues to give to this bill.

Specifically, there is more of a sense that timber, cultural, and energy sites will be a part of the final bill. There is also a sense that further work will be continued after the landbill is passed to get more land through other processes.

Pessimistically, feelings are split between those that feel that Sealaska will get the land bill passed but will not get what was requested as it had to make serious concessions and allow constraints on use of the land, and those who feel that the land bill will not be passed and Sealaska will have to move on. In this category, timber was the only specific industry mentioned. A small number of respondents think either Sealaska can make timber into a sustainable business or perhaps it will just cut all the timber unsustainably. There are several who indicated that despite poor operational performance, Sealaska still has the benefit of its land base and one respondent indicated that the land base would be transferred to tribal hands so it would not be lost.

Just less than half feel that Sealaska will most probably get the land bill passed. There is an indication that it would most likely be awarded a small amount less than what was asked for.

Political

Politically, in the optimistic scenario, interviewees indicated changes in two main areas: areas where Sealaska leveraged its political influence to achieve its goals and areas where the company worked to increase both Sealaska's and Alaska Natives' overall political capacity.

Sealaska leveraged its political will toward many items such as the 8a program, the Jones Act amendment, supporting the landless, tax sector amendments in Alaska, support from the state for economic development, and local infrastructure and energy and transportation issues. These projects were mostly addressed after the land bill was completed.

Political capacity was increased at both the level of the company and the Native community as a whole. At the company level, there are a number of people with political skills and who are involved in politics. Sealaska has also worked hard to build and mobilize the Native vote by building political capacity at the community level.

In the pessimistic scenario, there are two main ideas. The first is that Sealaska is not able to leverage political will to get things changed such as the Jones Act amendment. It either took itself out of the political scene and used lobbyists for specific issues, or, at the other end of the spectrum, a picture of a pessimistic future in this category is one where Sealaska continued to overemphasize efforts on politics. In general, the responses suggest that Sealaska's political capacity has declined and that it does not have the political clout it had in the past.

Politically, in the probable scenario, there is a general idea Sealaska will be less involved with politics over the next 15 years. We will have more assets and will get better at working politically if needed. Sealaska will continue to have a national political presence.

Culture

Culture is an area of special focus because of the relevance of values to this study. This section will examine culture in general and consider how the Sealaska Heritage Institute is described along with the future of celebration, language, and scholarships. Values will be discussed as part of the overall values section.

Optimistically, in the area of culture, tribal members have become accountable for their own success. The culture is lived, language learned, and art is supported through culture camps, curriculum, and early education. Cultural sustainability is a focus of Sealaska. Sealaska Heritage Institute (SHI) is stronger and is the lead of this effort with Sealaska. Sealaska works to protect the local language, art, culture, and values. Over time, more of this type of responsibility has

fallen to SHI. Although SHI could be self-sustainable, nevertheless Sealaska still contributes to the institute. SHI has completed the cultural center, and although has not grown in terms of employees, it is more active with communities. SHI offers training to artists, and pursues a range of cultural, historical, artistic, and cultural land management practices. For example, SHI partners with Sealaska and Village Corporations to manage sacred cultural sites. SHI still manages Celebration, the bi-annual Native gathering, and language education and scholarships.

Celebration is still a main event in Juneau that serves as a reflection of values, art, culture, and dance, although now it is a larger event and is several days longer+. There are more opportunities for education during this event. Language has changed over time. There are more intermediate speakers and less fluent speakers. The languages are codified. Scholarships have grown. The increase in total amount of scholarships has allowed for more of a tailoring for some of the funds to incentivize the skills Sealaska requires more immediately.

Participants varied in responses, touching on topics ranging from investment in SHI to Sealaska not being able to afford contributions to SHI to Sealaska endowing SHI. This reflects the esteem that some have for SHI as an institution. SHI is perceived as being able to survive independently, from outside sources, or to disappear without Sealaska support. Scholarships are perceived as remaining flat or decreasing in number. Language is declining and we are working to preserve not grow it under this scenario. Celebration is still an event in Juneau but is now much smaller.

If things continue as they are, there is a sense that Sealaska will continue to fund SHI as it does today or possibly endow it. Scholarship levels will remain at the same level as today. SHI will get its building and become more distant. SHI will continue to support language efforts.

Social

The social subcategory describes the relationship between Sealaska and other Native entities and how those relationships change over time. In the optimistic scenario, participants reported on what changed and how. In this scenario, there is a clear effort to work together more collaboratively and a better understanding of how each institution fits and contributes to the broader society. Initially, this was difficult as there were a lot of leaders. Strategies used began small such as creating Memorandum of Understanding's (MOU's) to work with village corporations, partnering to develop employees, remaining positive, and trying to understand each organization's capacity through assessment. Gradually, the groups were willing to come together around one issue where there was agreement, such as the energy issue in SE or more broadly to help the communities. The organizations used formal collaboration tools such as mediation and strategic planning to get role clarity and ensure that each built on strengths and brought resources enabling them access to the issue.

Pessimistically, Native institutions were not able to work better together. There were less resources available to tribes and more strife and disagreement over limited resources. This was in part because they still have not reconciled the power of tribal governance with the land ownership and economic responsibilities created by ANCSA and IRA. On a positive note, there was an idea that the relationship with village corporations has improved.

Respondents expressed in this category that the relationships between tribes, ANCSA corporations, and other Native organizations will likely continue as they exist now. There will continue to be a large divide between tribes and ANC's. This could ease as the next generation moves into leadership roles and begins to work between these entities.

Values at Sealaska

Values are an important category at Sealaska according to the interviews. It is important to note that values are not important just within Sealaska but in affiliates such as Sealaska Heritage Institute, Sealaska's subsidiaries, at the community level and at the regional level. Throughout the interviews, there is rich description of how values will be integrated at all levels from the individual level to the regional level. Most of the engagement is reflected in the optimistic scenario.

In the optimistic scenario, values are exhibited throughout all the interviews, and therefore much of this feedback has already been discussed, for example, within the category of capacity building in several of the scenarios already covered such as in the business section. Also, values are reflected in how Sealaska seeks to improve the quality of life in Sealaska villages through Haa Aani. The feedback on values that has not been discussed so far will be outlined here.

Values can be seen at various levels within the interviews. Some participants naturally link values to a regional level while others think at the level of the individual employee or shareholder. Those different levels seen across the interviews are at the regional, community, environmental/economic sustainability level, selection of business, operation of business, values reflected in decision and process, a picture of what operationalizing Sealaska's values will look like in the future, and a sense of what values in action looks like at all levels.

At the regional level, Sealaska is seen as modeling and engaging with other Alaska Native organizations across the state to articulate and develop shared values at that level. At the community and tribal levels, values can be seen in the transmission of values through generations and cultural sustainability.

In terms of environmental and economic sustainability at the level of Sealaska's land, there are examples of sustainable natural resource businesses that "maximize what we have, utilize what our ancestors had as we can and preserving what is here for future generations." In addition, land is not to be sold or abused in any way that would violate the ethical, value, and moral character of tribal members and shareholders. Land has intrinsic value and is integral to Native identity.

Values are described as helpful in selecting which businesses to enter, maintain, or exit. For example, Haa Aani and Sealaska Environmental are a part of Sealaska's portfolio and are in line with Sealaska's values. The operation of a business can also be in line with the values. A relevant example here is how Sealaska creates and maintains long-term relationships through the values of reciprocity, balance, and respect. Sealaska has refined Values In Action tools and the Sealaska way, integrating values into the business to clarify how it manages its operational platforms.

Respondents also discussed elements of specific items or uses of process around values. For instance, when making decisions, all are more conscious about the impact of short-term decisions on longer-term resources. In terms of process, we have structure and policy to support cultural, community, and political engagement. Sealaska also uses its values to frame the dialogue around progress.

As in all of these domains, it is important to have, if possible a sense of how people describe what future success looks like. Some ideas offered here are that the Tribal Member Shareholder connection and Native identity are stronger now and better understood even by those who do not live in SE Alaska. Sealaska is accomplishing more of both the original intent of Sealaska as well as the evolved intent. Finally, Sealaska has a reputation for striving to live

by its values and its process and decision-making is transparent.

At the pessimistic end of the scale, interviewees felt that Sealaska's effort to integrate Native values is seen to fail as just another initiative, perceived as a tagline and a hypocritical effort that would not change how Sealaska does business. An idea of what caused the failure is that Sealaska was not able to make the tie between culture, values, and a for-profit corporation. The values would still be within Sealaska's board and Native employees but would not be articulated in a way that they could be taught or could become a competitive advantage.

There is a sense that most probably, Sealaska will make some progress in integrating their Native values, however, it will not be easy and will take longer than expected. This is because it is difficult to do, requiring careful thought about what makes sense in the context of Sealaska and the work that Sealaska does. Such efforts will likely begin with small steps.

Now, after sharing the detailed summaries of interviewee perspectives of the optimistic, pessimistic and probable scenarios, I will go on to describe the ideas of interviewees about what can be done to move their collective probable scenario for the future of Sealaska toward their collective optimistic scenario for the Sealaska. This section offers ideas based on current actions, providing support for those actions, or offers new ideas of actions Sealaska might consider moving forward.

Strategies to Move the Probable Scenario Toward the Optimistic Scenario

What follows are the specific action interviewees recommend that will move Sealaska toward their optimistic vision for Sealaska's future. The list shown here is quoted as closely as possible from the interviews. Then when in the process of checking on whether the data seemed in line for Sealaska during the group meeting to review aggregate data, I asked all participants to give me their top five strategies to move their probable scenario toward their optimistic scenario.

Duplicates in these results have been combined and strategies have been grouped into the following categories: Values/Culture, Business, Region and Capacity. Business has three sub-categories: Innovation/Growth, Leverage, and Investment and Focus.

Strategies to move the probable scenario toward the optimistic scenario:

- Values/Culture
 - Get buy-in for Values In Action or they will not be genuine
 - Develop a model for decision making at operations that reflects our values
 - Create a strategy on how to use Native values to inform the economic utilization of our resources, begin from a blank sheet of paper
 - Demonstrate Native values regardless of direction
 - Create a safe space for difficult discussions on business and other topics
 - Implement lean in our business and processes
 - Move toward creative risk taking and implement a strong management system (lean and values in action)

- Business
 - Innovation/Growth based on competitive advantages
 - Find a game changer like the Jones Act amendment (allow domestic shipping business advantage)
 - Get better at acquiring and sustaining federal contracts in a time of decline
 - Generate more income from current operations; weed out poor performers. Make investments based on strengths
 - Buy a company that will generate income for Sealaska
 - Have discipline to know what you want and move quickly to get it
 - Leverage and Investment
 - Leverage the asset value and our resource base appropriately for the strategy and calculate risk better
 - Convert ING and permanent fund to operating businesses with 15% return on investment
 - Reserve higher portion for reinvestment- currently spend and distribute too much
 - Focus
 - Focus on alignment including reducing scope of operations
 - Execute on one strategy for a couple of years and do not digress to other things
 - Hit the vision statement out of the park
 - Finish land legislation one way or the other and get it behind us
 - Become sustainable without 7i or investments

- Region
 - We need to create a presence in whole region; reach out to our communities in a casual more holistic way

- Be more conscientious about tying operations back to SE Alaska; actively pursue opportunities in Alaska
- Renew commitment to SE Alaska with visible, tangible actions
- Energy—lead or advocate for more involvement in addressing the energy situation
- We need to train and invest in our own people here in the region.
- Capacity
 - Developing people
 - Develop our female employees
 - Need to accelerate development of our human capacity
 - Develop an excellent HR management capacity that is scalable and flexible enough to adapt to any new possibility
 - Engage more, younger shareholders through things like scholarships and internships in a more focused manner.
 - Create an intense manager development program
 - Create a succession plan tied to long-term outcomes including board and management level
 - Encourage people and empower innovation from the bottom up

These strategies are powerful and useful for understanding how people feel Sealaska can achieve a future that moves the probable toward the optimistic scenario. During the discussion of the data overall, each in the group voted on their top five strategies from the full list. The strategy highlighted in green received most votes. The rest received a different amount of votes at various levels of priority; however, the spread of the choices clearly shows a bias toward building capacity, values/culture, work in the region, and lastly in business. These choices are not meant to represent Sealaska's top initiatives moving forward but rather the usefulness of this method and its ability to help narrow, focus, and define future actions. In this test, it seems that this method could to help define next steps. Additional work with a larger group would need to be completed before the top strategies could be recommended.

To be clear, Sealaska is moving forward on some of these strategies already. Participants have either committed to elements of the current strategic plan or modified these elements in some small way so that they are suitable within the strategies each presented during the interview in a manner that is interrelated. Either way, Sealaska is working on many of these items such as

continuing to integrate Native values into Sealaska, generating more income from operations, looking to acquire a new company, completing the Sealaska landbill (legislation), renewing Sealaska's commitment to SE Alaska through Haa Aani, and developing people.

Themes

Themes are general ideas that stem from looking at the patterns of all the data, from the raw data to the transcription, to the summary, to the category and subcategory. There are three that stand out to me when looking at this data.

Upon entering this study, I hypothesized that integrating our Native values into our business was important for the future of our people and could provide a competitive advantage for Sealaska. At the end of this study, it is very clear that all participants were deeply engaged, knowledgeable, and innovative about how to integrate Native values into Sealaska and have a picture of what that future looks like. At the same time, however, whereas each has a different picture of the future, all potential pictures are in line with Native values, yet are simply not aligned with one another. Work needs to be done to create a shared, focused picture of the future of Native values in Sealaska.

Although obvious to many, it was amazing for me to see that the pattern of how Sealaska as it is defined so far beyond the corporate walls truly reflects a social entrepreneurship and not a typical corporation. This is the second theme that was clearly illustrated through the data.

The last theme that emerged indicated that the passion, engagement, and innovation around values did not extend to the businesses that Sealaska currently owns with the exception of Haa Aani. The future of Sealaska may not be how to integrate values into the corporation but perhaps how to integrate business with the Native values and Sealaska. In order to be sustainable, business proceeds must support all the work of Sealaska.

Chapter V: Interpretation

Within this chapter, I will present an evaluation and interpretation related to the results of my dissertation question, “What is the future of Native values at Sealaska? I will examine, interpret, and qualify the results of this project by characterizing the milieu of Sealaska and explicitly linking any results, inferred or theorized, to base data, data from the field, and my own practitioner experiences. The last two sections of this chapter will cover theoretical and practical consequences of the results, the validity of conclusions, and the scope/limitations and suggestions for future work.

Evaluation/Interpretation

This section will be used to provide additional detail and support for the themes and illustrate the main points of analysis that led to the identification of the three themes in this research project. The facets illustrating these themes will be explored.

Ideas about integrating Native values in Sealaska are extensive but not shared.

Native values have a clear future within Sealaska; the intense level of engagement and the detailed descriptions of individuals that offer a wide array of alternatives to operationalize Sealaska’s values support this statement. For example, when asked about values at Sealaska in the optimistic scenario, participants indicated:

Sealaska—deciding on areas of engagement at company level:

It (Native values) also gave people a reason to make decisions that brought discipline to the business and focused in on a couple of key sectors rather than ending up in six or seven different sectors, with a pretty small play in each, and not growing fast and struggling. We narrowed down and focused on three or four that were more closely related, and had some intuitive resonance with the shareholders, the younger folks, and said yes that’s an industry that we can get into and take pride in and makes sense.

Sealaska- employee level impact

I think our Native values are integrated into everything we do. For example we continue to have the policy for people to take subsistence leave...I would say throughout the policies we think about “does this fit within our values”—whether it’s family leave or participation in certain community activities these are were all important things integrated into our policies.

Community—Health and Capacity:

We know more about development and have structures to help young people grow up healthy.

We implemented a program whereby the uncles who weren’t necessarily their blood uncles but mentors for these young men to help encourage them and to get them involved in wherever sector of our businesses they were interested to try to get them trained to do something that they enjoyed doing that would keep engaged and to help them to feel good about themselves and to feel good about their futures. It has been a success because so many of our young men now are not only high school graduates but they’ve also either graduated through a trade school or college and we have a very high rate of employment and it really takes everybody, it takes a village (to raise a child) the uncles program has worked out really well.

It is necessary to remember that there is a difference between values in general and cultural, indigenous, and organizational values, as well as understand why these differences are important in this research project. Because there is complexity reflected in the ideas above as they relate to a business, honing in on these definitions will help us to understand why the responses vary so greatly. Values are beliefs about desirable end states/behaviors that are not situation specific and guide selection/evaluation of behavior and events, reflecting relative priority/importance. Schwartz and Bilsky (1987) and Enz (1988) describe the function of values in an organization as choosing what business actions are preferable in establishing organizational objectives. Giberson et al. indicate that organizational values are seen as a “relatively narrow set of values” by some theorists, “Kluckhohn, 1951; Schein, 2004” (p. 124). Schwartz (1999) defined cultural values as “shared ideas about what is good, right, and desirable in a society” (p. 25). Indigenous values, the values of a specific group and their society, are considered to be

founded upon a “vision of wholeness, where all things are interconnected and interrelated” (Redpath & Nielson, 1997, p 330). Common indigenous values are relationship, responsibility, reciprocity, and redistribution (Harris & Wasilewski, 2004). The Native values adopted as the values of Sealaska are: Haa Aani, Haa Shagoon, Haa Latseen, and Wooch Yax. Haa Aani represents the enduring relationship of Tlingit, Haida and Tsimshian people to the land. This interdependent relationship is spiritual, cultural, and physical care and use of the land. Haa Shagoon generally represents the concept of history and sustainability and is most often described as encapsulating the past, present, and future of these tribes. Haa Latseen represents strength and leadership and Wooch Yax represents balance, reciprocity, and respect. The task before Sealaska and perhaps some of the reason for the diversity of answers about what the future of Sealaska will look like is that Sealaska has taken values relevant at the level of a Native society and thus feels that its corporate purpose is, “to strengthen our people, culture and homelands” in terms of both a society-level purpose as well as with a view toward end-state results. The company also strives to translate those values specifically and relevantly within an enterprise, when an organization can typically only handle a narrower set of values. It is clear that the specific action or behavior of each individual that manifests based upon Sealaska’s values is not shared. I am not indicating that the values are shared or not shared, I did not spend time in the interviews or as part of this process defining values. I am simply observing the proposed behaviors, or the choices or actions based on values, the specific results, or the picture of the future those individuals provided and noticing that those pictures do not match across participants to reveal many clear trends. In those pictures the translation of values into action must be agreed upon as the accepted and chosen translation of Native value into Sealaska. As we saw in the results described in Chapter IV, there are many examples of what values might look

like within Sealaska: for example, building capacity through employee and leadership development through scholarships and building community economic development through Haa Aani, to name a few. It is equally clear, however, in the broad array of answers that there is no alignment on what the values, purpose, and vision mean to Sealaska, specifically from the shareholder to the enterprise level to the employee level, although there is significant engagement and energy around this topic.

Sealaska as a Social Entrepreneur

Sealaska is a social entrepreneur not simply a business. Social entrepreneurship is described as, “an ability to leverage resources that address social problems” (Pearson & Helms, 2013, p. 59). In addition, specifically related to Australia, these same authors indicate that, “Australian social entrepreneurship is rooted in Indigenous clan survival,” (p. 52) and, “Social entrepreneurship, which embraces both basic business functions and social networking interactions, is culturally acceptable to Australian Indigenous people” (p. 52). Both statements seem relevant to Sealaska based on the interviews presented here and my experience of working in this company. Finally, when summarizing other authors, Pearson and Helms (2013) describe social entrepreneurship, “as a hybrid commercial model, unlike traditional business, that does not measure success by profit alone, but operates to resolve pressing social problems, which have not been satisfactorily resolved by traditional means” (p. 53).

This social entrepreneurship model helps to explain the breadth of work completed by Sealaska, and how that work expands beyond the industries Sealaska works within to the culture, community, tribe, and political advocacy arenas in addition to its businesses. Anders and Anders’ (1986) idea that typical corporate goals conflict with the shared values of Alaska Natives and Buchanan’s (2010) idea about ANCSA corporations’ success being measured on

cultural, social, and financial measures also support the idea that Sealaska is a social entrepreneur.

This model, this idea about Sealaska's proposed structure being one of a social entrepreneur, is illustrated by four metaphors, which surfaced in the interviews. The first metaphor (#1), implies how Sealaska becomes focused, moving forward in a way that is in line with values for the support of the community. The second quote implies an entity that is larger than a business. The third quote speaks to the presence of Sealaska as it defines itself differently than a regular business and finally, the third relates Sealaska to a local animal and a tribal house.

The following are direct quotes from different participants:

1. Sealaska used to be a boat where you had people at the stem and the stern who weren't talking to each other. And the captain in between wasn't making anything better, focusing on the scenery when they should be focusing on avoiding the rocks. You had two or three engines on the boat and they might not all be facing the same way.

Some people on the boat wanted to be fishing, some people on the boat wanted it just to get them to their destination as fast as they could and some people wanted it just to be a leisurely three hour cruise. Sealaska is now more like the canoes of old. We've stripped away a lot of the aspects that people didn't like about it, or are still stripping it away. Now people know their places in the boat, right. They know why they're critical and they pull together.

Everybody pulls in the same fashion because you know that everybody recognized they're indispensable to each other. They know why they're pulling; they know why the boat is shaped the way it is, why we have how many people we do. It's just a much more thoughtful and organized and aligned system.

2. it (Sealaska) would be like a train. You know, trains don't start really fast usually, and they're usually carrying big loads. It takes them awhile to get going, but once they get going, they're going. It's hard to stop.
3. it's an old story about a lotus, the flower, lotus. The thinking, the rationale, was that it (the lotus), in the right setting, quietly blossomed and captured the attention of the whole room, in a way that people didn't even really (notice) then get it quickly. Then by the end of the time there, it was just a quiet but powerful presence.

The impact was on the others not on the lotus. Sealaska was wrestling with what it wanted to be and what it wanted to look like, back then when it grew up...many years later, it's sort of like that lotus where everybody sees the beauty and gets it now.

That's what we were supposed to be, what we were supposed to look like but before we fully opened up and got there, we couldn't really predict. We just knew it was going to be something beautiful not just to us, but to the world.

4. In 2012, we were still like a little baby cub, just trying to find our way and now...[we are] a full-grown bear cub. Full-grown bear (that is) aggressive, strong, maybe even a little threatening to some people in a political sense but strong enough to survive anything.

Each of these metaphors is a powerful idea of where Sealaska is in 2012 and where it could be in 2027. There is a sense of culture, of something larger than business perhaps something political but clearly not an entity bound by typical corporate walls and ideals. These ideas help us see glimpses of the social entrepreneur that I propose Sealaska is and perhaps some hopeful ideas of what Sealaska could become.

In addition to these powerful metaphors, there are three examples that fall in line with the idea of social entrepreneurship that were clear areas of agreement in the project, even if specifics around the future of each category might differ by participant. These examples are the Sealaska Land Bill, annual support and collaboration with the Sealaska Heritage Institute, and the creation and development of Haa Aani.

The land bill is an effort for Sealaska to select its final land entitlement, yet it would like to select those lands, for various reasons, outside the original selection area. As part of the selection lands, the land bill includes provisions for lands for economic development, lands that are culturally important, lands that might help Sealaska and the region to address the serious energy issue in SE Alaska as potential alternative energy sources, and lands that might be valuable to future generations of Tribal Member Shareholders. The land bill is a complex example of political advocacy, business, and cultural values. This landbill, as described earlier

in this paper, requests 70-80 acres of land entitlement as of yet not awarded as agreed to under the Alaska Claims settlement act and is close to taking more than ten years to complete because Sealaska is not simply interested in lands with economic value but lands that will help further Sealaska's goal to strengthen its people, communities, and homelands.

Sealaska supports the Sealaska Heritage Institute (SHI), an affiliated non-profit organization. Sealaska provides operating funding as well as scholarship dollars that SHI distributes annually. According to the organization's website, "Sealaska Heritage Institute seeks to perpetuate and enhance Tlingit, Haida and Tsimshian Cultures" (www.sealaskaheritage.org). Sealaska, with the annual contribution to SHI, directly supports culture, language, and art. This is an example of providing for social, cultural, and long-term general human capacity rather than direct economic benefits. One participant provided a specific example around language and SHI's role in preserving the language within their optimistic scenario:

We had been in the process of losing our language. Sealaska funded the Heritage Foundation. The Heritage Foundation was successful in going out and getting other grant monies from funders like the Rasmussen Foundation and through the government. The State of Alaska legislature, in 2012, passed a bill that created a department in the state government for cultural languages. This project was funded and supported by the state government, the federal government, and Sealaska, as a for-profit corporation, to help keep the Native languages alive.

This example shows the work, in part, supported with Sealaska's annual contribution to SHI, a clear example of "leverage" for cultural survival. In addition, SHI is working to co-manage culturally important sites on Sealaska land with local village/tribes through Management Operating Agreements between Sealaska, SHI, and connected villages or tribes. SHI, although not owned by Sealaska, is seen as a partner in developing Sealaska employees culturally as well as working across the region.

Haa Aani, a subsidiary of Sealaska, might be considered a microcosm of Sealaska. It is easy to see the vast scope of what Haa Aani is attempting whereas it is not so easy to see the same picture, although there are clear parallels, at the Sealaska level simply because of scale. Haa Aani is focused on the SE region now and may broaden that scope over time whereas Sealaska's scope of effort spans from Alaska to business and political interests across the nation. The Board of Sealaska directed the creation of Haa Aani and is deeply involved in the activities of Haa Aani as it develops. Each member of the board has a slightly different sense of the purpose and path forward of Haa Aani. Evidence is shown in Figure 4.1 about the model of Haa Aani based on interview data of the broad purpose and activities of the participants in the study. Below are several interview quotes, from different participants, about the work of Haa Aani:

- It's [Haa Aani's] purpose was to be a subsidiary...that could operate at the village and community scale.... Sealaska did not have the tools to reach into communities and get actively engaged. Haa Aani was meant to focus on the economic sustainability in our Native communities within the region and on and adjacent to our Native lands. Haa Aani was specifically authorized to bring other capital at the same scale into the communities, philanthropic capital, patient capital, capital that wasn't seeking short-term return. Haa Aani was given the mandate to help create networks and relationships and bring both internal and external partnerships to bear on local community development. It was an effort to bring Sealaska resources to the village level in a way that empowers local people to build and strengthen their own communities while still being a profitable enterprise.
- It (Haa Aani) has been successful so now we have a very huge coterie of tribal member entrepreneurs and that was goal, was to be able to develop a sustainable economy. Haa Aani is a participant and a catalyst so didn't have to own all that much.... The idea was to create an environment, and Sealaska, to use its tools to bring resources. Sealaska created the access to resources that allowed people to be able to fund their small businesses.
- In 2011, we put money into Haa Aani that we never expected to make money, just kind of like a non-business cultural event like celebration. You put money into celebration not expecting to make money out of it. We felt a moral obligation to bring employment to shareholders and make sure that those villages survived, so we put money aside knowing we would never get a return on the investment. Because it's not so much an investment as it was a contribution to jobs and those villages.

These few quotes illustrate the social outcomes, the social entrepreneurship of Haa Aani, the broad purpose, social and economic, that it is trying to balance.

In addition to the scope of the interest of a social entrepreneur, Haa Aani and Sealaska also suffer many of the same obstacles that a social entrepreneur typically deals with which Frederick (2008) indicates generally are:

- Social/Individual disadvantages—lack basic necessities, financial hardship, illiteracy, lack of skills or psycho-social problems.
- Geographic disadvantages—live in rural or remote or urban poverty areas.
- Cultural disadvantages—language/cultural differences.
- Economic disadvantages—higher unemployment, lack of childcare, dependence on welfare.
- Political/structural disadvantages—lack of services/infrastructure/training/social capital networks. (p. 188)

Haa Aani and Sealaska have been spending time to address almost all of these issues. For instance, Haa Aani is developing a Community Development Fund Institution to provide training in business and access to patient capital. In addition, over time, Sealaska has been actively engaging in energy issues in the region. Sealaska supports SHI to ensure the language and culture is preserved. Sealaska and Haa Aani are working to provide jobs in the SE region with projects such as the project in Kake, which reopened the cold storage. Finally, Sealaska has been involved in mobilizing the Native vote in the region. All of these initiatives, in line with the social entrepreneur definition, are also in direct response to the same barriers indicted by Frederick (2008).

Most corporations are responsible for managing their business operations profitably and distributing that profit among shareholders in order to continue to earn or grow that profit over time. In some cases, corporations are beginning to acknowledge that being a good corporate citizen is also important in terms of contributing to good causes, acting as a good neighbor, and managing their impacts upon the environment. Sealaska and other Alaska Native Corporations do these things as well but also have the direct charge to ensure the future of an indigenous culture.

Values that are not embedded into Sealaska but business embedded into values. The final theme is that there is not nor will there be an issue, beyond agreement or focus, with values in Sealaska but there is a question of whether business will become integral to Sealaska as a whole, whether the passion and engagement in the businesses Sealaska owns will balance the passion and engagement in the purpose of Sealaska.

It is clear from the interviews that Sealaska only has one business that is close to the hearts of those interviewed, Haa Aani, the small subsidiary focused on economic development in SE Alaska. Second to Haa Anni as most connected and perceived as aligned with Sealaska's values are the timber company and the environmental company. The timber company must become sustainable in order to remain within Sealaska's portfolio but there is a deep connection to Sealaska Timber Corporation based on the long history, the tangible nature of the business, and the immediate local impacts of this business. The environmental company is seen as in line with Sealaska's values but the future of this company is perceived as uncertain. The rest of the companies, in terms of alignment with Sealaska's values, rated medium to low. There is a greater interest in business in Alaska as opposed to outside Alaska even though the majority felt that future business would be primarily located outside of Alaska, in the West. The significant

specific aspects of business that interviewees seemed to agree upon about Sealaska was building human capacity, helping Tribal Member Shareholders and Tribal Members develop to secure a better future. The engagement around which business to be in or which would be part of the future was shallow based on the detail received in the responses. Almost all candidates described the future of oyster farming in SE but when asked about environmental or other companies situated in the lower 48, the responses were vague. In fact, in some cases subsidiaries were seen as a means to gain dollars for Sealaska activities such as Haa Aani but the passion did not exist for the business and the products produced. The many ideas mentioned within each of the interviews about what values look like on the company level are summarized below:

- Increase in tribal member employment
- Near shareholder base of population
- A company in line with Sealaska's values

Sealaska is implementing these same types of ideas as it exits companies and looks to acquire a new company. Sealaska is considering whether the company will offer opportunities to shareholders, is close to a location where there is a significant base of shareholders, is financially sustainable, and benefits the world somehow with its products and services. Based on this section above, I would ask one more question as Sealaska selects its acquisition: Is this a company that Sealaska's board, management, and staff can be truly passionate about, passionate enough to engage and operate the company?

Examine

As with all studies, it is important to review the results as they tie back to the relevant literature. Do the findings from this study fit any of the concepts, studies, or models shared in Chapter II? Does this research study help fill in any gaps that exist in the literature review? Do

the findings offer any new information that may help others who are studying similar topics?

There are several main areas of agreement between this study and Chapter II, the literature review. Those areas are the reflection of values that seem in line with Sealaska's values as defined in Chapter II, the relevant and irrelevant definition of values overall, the typology of values research, and the specific research on incorporating indigenous values into an organization.

Throughout this project, participants gave me a picture of the future Sealaska. Each provided details related to many facets of Sealaska, however, I did not probe for which specific value they were basing that picture of the future on. As mentioned above, the values Sealaska has adopted are Haa Aani, Haa Latseen, Haa Shaagoon, and Wooch Yax. The ideas for the future do seem in line with those values but those pictures are based on one person's translation of one or all four values into the future Sealaska context. That picture could even reflect different values than the four indicated. The collective perspectives of all interviews shows alignment with the four values but the findings here help us move toward a shared collective understanding of what those four values look like at Sealaska.

In terms of definition, the definitions of values, organizational/business values, and cultural/indigenous/Tlingit, Haida, & Tsimshian values that seem most related and relevant to this study have been described in the first section of this chapter. The scope of each of these definitions shows interdependence and complexity and illustrates why generating a common picture from the Native values adopted by Sealaska is difficult. In addition, it is just as important to describe elements of values as defined in Chapter II that are not as relevant to this project. Those are the individual level values; for example, extrinsic, intrinsic, social, and prestige and the motivational domains of values. This study provides detail around extrinsic values at a level

of an employee, for example, when participants mentioned pay at median to market but it was certainly not a focus of the study. Similarly, motivational domains were not an area I could tie back from the interviews since I carefully did not explore this in particular.

The typology, the various levels of values, types of values, and the types of organizations reflect the broad area of values research covered in Chapter II. The revised figure illustrates the factors that bound my research project.

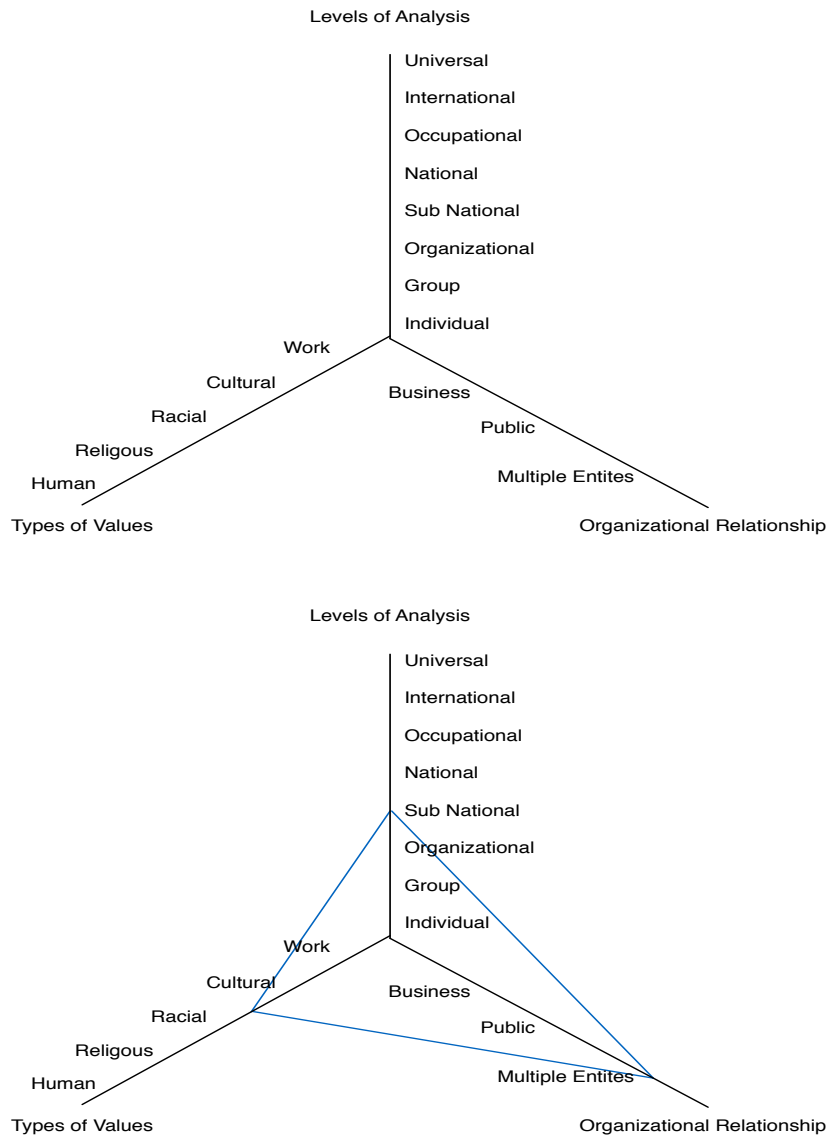


Figure 4.2. Scope of literature review vs scope of research project.

The first figure gives a broad picture of the scope of the literature review in general although I did not expand to human values or universal level of analysis, all other areas were covered within the literature review. The second figure illustrates the areas covered by this research project. As you can see from the figure, there are areas even within the literature review that will not be essential to this project except as a backdrop that shows the broad scope of values research in organizations that align with cross-cultural arenas.

An intriguing illustration of the idea of values typology in this research is the fact that each interviewee presented examples of what values looked like across Sealaska at multiple levels from individual to regional or “sub-national” and from employee to enterprise. Several specific examples illustrate the typology above in a manner that provides concrete pictures of this framework. The first example reflects values at the level of the employee with respect to how values are incorporated into a personnel policy. Additionally, values are defined at the level of individual, at the corporate level, where they are used to select the kind of companies Sealaska chooses to buy, and at the community level in terms of the types of economic partnerships Sealaska develops with the community. The following is a quote from one of the interviews that reflects this complex typology of values and indicates how easy it is for individuals to think about values at multiple levels at the same time:

in the last 15 years they (Sealaska and Haa Aani) have fully integrated values and action within the company and it's part of the company's DNA now. The corporate entity, as well as all its subsidiaries, demonstrates the usage of those values in their everyday practices and business practices. I think that we've done a lot of really great work in the southeast and have really made strides to make our rural communities more sustainable. I think that we've created training programs that fit the industries that are successful within our communities, because prior to the work that Sealaska and Haa Aani have done, there was a lot of outward migration because a lot of the industries that were training and providing training weren't viable jobs in our communities, but we've kind of changed that and made it so there's programs and training programs to build capacity for those industries.

The examples above illustrate the complexity inherent in respondents' discussions of values. The range of potential levels of analysis is evident in the above quote, while at the same time these reflections also illustrate the complexity of this type of analysis as they encompass the idea of work values at the level of operating values with the idea that values are a part of everyday practices. In addition, this quote also illustrates how values are put into action at a community level through training efforts.

Research within indigenous organizations reflects similarities in terms of values. Regardless of how the research method has defined values, the culture and context are similar. For instance, the four studies related to incorporating Native values into business range from case study, model/theory development, and mixed method, but most revealed significant relevant corroboration with my research project.

The relevant literature on values research within indigenous organizations may be impacted by this dissertation, as it is currently a very limited body of research. In addition, this research project adds value as it offers information on the use of Ethnographic Futures Research method in organizational values research, a unique approach implemented in my review of research in this area.

My Role as Researcher and Employee With a Changing Sealaska

It is important to explain that this rich description from interviews came at a time when Sealaska, as a company, was revising its values, purpose, and vision. This process began about one year prior to the start of the interviews for this dissertation and continued through and were finalized December 2012 after the interviews that were part of this research process were mostly complete. Since this was such an important factor in the relevance of the description received through the interviews and the current relevance of this study to the organization, I will use the

following pages to illustrate the parallel process the company followed to finalize these items and illustrate any ties or connections relevant between two processes.

In addition, I will reflect on my role as both an employee and a researcher since I was deeply engaged in both the research process and the process to revise Sealaska's values, purpose, and vision.

Table 4.4.

Sealaska's Timeline to Revise Its Values

Sealaska Process		Dissertation Process
Formal discussion - updating mission	7/2011	
First Working Group		
VIA Roadmap Draft approved	1/2012	Proposal Accepted
Executive Team approved		
Board approved Values and format of Roadmap	4/2012	Interviews
Roll out to employees		
Roll out values to Tribal Member Shareholders and Community		Transcription
Board discussed and requested refinement of vision		Summarizing
Board approved final purpose and vision	12/2012	Checking summary with interviewees
Operationalizing Values		Analysis
		Data back to a group for validity
		Writing
	7/2013	Final Submission

My research process and the company's revision process of values, purpose, and vision were complementary in that many people were discussing the importance of values, purpose, and

mission at all levels of the company, which created a fertile starting point for individual interviews. One team became responsible for the work in early 2012, from coordinating discussions to writing drafts to presenting ideas to the board. I coordinated/facilitated much of this process, which required a broad effort on the part of the dedicated workgroup, the executive management team, and the board, most of whom were fully-engaged throughout the two-year process. This process can be related back to the literature review in the sense that it was an effort to create basic values defined by Dolan and Garcia (2002) as, “basic values are essential for giving meaning and cohesion to the collective effort to move the company towards where it wants to go in the long-term” (p. 112). This two-year process also worked to reconcile that aspiration with organization or business values, defined generally (Enz, 1988; Watson et al. 2004) as either the criteria, explanation, or objectives for business activity. This was an enterprise-level process that strived to connect cultural values to an organization. This was a consensus-driven process for the most part. The workgroup, consisting of headquarter and operations employees and two board members, created materials to frame the discussion and a process of defining terms and draft language.

My research, on the other hand, asked individuals to work from their own personal and cultural values to create a picture of the future of Sealaska. This process also targeted the enterprise level, but based on the preference of the participants moved from the individual level to the community level to the regional level and from the employee level to the organizational level. Based on feedback after each interview, the Ethnographic Futures Research Method interviews helped individuals clarify what each hoped would happen at Sealaska in the future. Participants were also surprised at how detailed their optimistic scenario was, and at how concrete and detailed their picture is of the future of Sealaska. I sense that the interviews also

helped bring the process to revise Sealaska's values, purpose, and mission overall to a successful conclusion although there is not any specific data indicating that this is the case. Many of the individuals gained clarity through their interviews that then came to bear on group decisions of the final values, purpose, and vision. This is a question for future researchers.

My role as both facilitator of the process to revise Sealaska's values, purpose, and vision and a researcher was complementary and at times frustrating. Participation in each process informed participation in the other; I had a more holistic view of the end goal by looking through these two related but distinct perspectives of Sealaska and the future of Sealaska. Broad knowledge of perspectives helped to keep both processes moving forward and the potential of the project kept me motivated despite obstacles and delays both personal and organizational. Perhaps most frustrating was the inability to share the amazingly innovative ideas, the clear alignment that I sometimes was aware of but since the knowledge came from the interviews and could easily become identifiable in our small group I could not bring those items up.

In addition, when looking at the data, it is easy to see how individual definitions of the future came to be implemented to create the Sealaska of today rather than shared action toward a collective vision. As this dissertation shows, there are a lot of ideas for the future but there really aren't any main areas of agreement. It is clear that there are very broad ideas that Sealaska exists to, "Strengthen our people, culture and homelands", as the purpose statement from Sealaska (2014) indicates, but the specific outcomes desired are diffused rather than focused. To use a metaphor, Sealaska is building a very broad rough road in a general direction rather than a paved, narrow road to a specific destination. This is inferred from both the findings of this paper as well as the participant statements of their pessimistic scenarios, which highlighted a theme for a failure to thrive at Sealaska being that it continues to try to do too many things at the same time.

During both of these projects, I observed the amazing breadth of ideas and activities and was dismayed at the idea that Sealaska can successfully address such a wide range of issues within the financial, human and political resource constraints that all organizations must exist within. This is in part due to the lack of a historical structural framework within the company that allows for the time and effort to come to agreement about the future Sealaska wishes to attain and a willingness to accept that, as an institution, Sealaska cannot fix all the issues of Tlingit, Haida and Tsimshian people in S.E. Alaska. Difficult choices, or tradeoffs, must be made in order for Sealaska to achieve results. This lack of structural framework has begun to be addressed in the process of developing and operationalizing Sealaska's Values in Action. For example, recent iterations of the strategic plan have managed to establish agreed upon, specific behaviors and actions and defined results that are in alignment with the Values in Action roadmap. This plan was agreed upon through several meetings with the board and executive management over a six-month period. In addition, recent specific, narrow and agreed upon definitions about what sustainable means to us as a corporation in relation to natural resources encourages me to believe that we are learning to be intentional about creating a shared goal, for the future.

This research project will be most helpful to me and hopefully to Sealaska as we move forward to operationalize the company's values, purpose, and vision. It has helped to identify some of the barriers to success, which I did not understand when starting both projects. One idea to develop further, as has been expressed in the previous paragraphs, is that it seems clear that agreement must be found on specific narrow translation of values within Sealaska based on Values in Action. Those decisions may best be supported through the values of Sealaska that will help the company recognize the limitation of their total pool of resources and make wise

decisions that take into consideration both the business and the social side of the balance sheet. What can we do to help to define how values look at Sealaska in terms of behavior and results? I believe that we must intentionally create the process that encourages open discussion of how we operationalize our values, develop tools to help everyone understand the tradeoff's that are made within a social entrepreneurship, facilitate agreement on specific behaviors and results that we can share and commit too, learn from our work that is completed and continuously define and refine the collective vision we share for the Sealaska we hope to become.

As a researcher, I strive to be balanced in my approach to this project. However, as a shareholder and an employee, I may not always succeed. I purposely have not incorporated more personal interpretation in this project, in part due to my connection to the project and in part as deference to the participants in the process. It is unfair, on my part, to infer beyond the level that I have, as this is a small project, with a limited number of participants. There aren't clear trends to be reported so the broad scope of the data was shared across all the categories rather than a shorter more concise ethnographic scenario. In addition, I haven't addressed any historical actions or behaviors of Sealaska since this project was about the future of Sealaska. Some may ask whether certain behaviors in Sealaska's past are in line with Sealaska's values? This is not within the purview of this research, however, I would answer this question by indicating that the behavior may have been in line with one of our values but not in line, not within the framework of all of our values. Or perhaps the behavior is simply that of a company, made up of indigenous people, learning to master the corporate form. It is my bias not to dwell on the past, except to learn from experience, and to use my energy to shape the future, that is the area we can impact with our efforts.

All participants felt that some version of Sealaska would exist in the future. I believe that

in any scenario Alaska Native Corporations are here to stay. After forty years of existence, these institutions are firmly embedded within the complex web of interrelated structure of tribal existence in Alaska. The work that I do is focused on the next phase of Alaska Native Corporations, which I hope is toward creating a corporate structure that reflects our unique purpose that shapes a corporation that we are proud to claim as part of our cultural and economic communities.

Finally, this research project did surface specific strategies to move Sealaska from the probable scenarios toward the optimistic scenarios. These strategies are provided in Chapter IV but fall into the categories of values/culture, business, the region, and building human capacity. Progress is already being made on several of the ideas, specifically around building a values analysis to support decision making and decreasing the scope of all that Sealaska does, creating focus.

Inferences

Theoretically, this study aligns with concepts, definitions, and several ideas from the literature review. This is, however, the first study I found that focused on creating a picture of the future and working toward how that picture reflects values. This is the first time the Ethnographic Futures Research Method has been used to study values in an indigenous organizational context that I could identify.

Practically, this study shows real world examples of concepts described in Chapter II such as the level of values and examples of most of the different definitions of values. Participant interviews certainly reflect the complexity of definitions and levels of analysis present when studying values.

As with all qualitative studies, this study reflects my personal perspective on the data and

my experience in Sealaska. In order to check the validity of this project, I checked the data that I found with a group after the first phase of analysis. Then, I asked for feedback from multiple participants on the three themes before finalizing this project.

Scope and Limitation of the Study

Limitations of the study have been identified in several areas. This approach moves toward general themes from very detailed and description-rich qualitative data. During the process of finding agreement on the categories, subcategories, and themes, valuable innovation and creative options were generalized and their value thus diminished and may have been lost. I expect to go back to participants to see if they are willing to share some of their interview data so this material can be used going forward. While finding general broad areas of alignment and agreement, the specific action and strategy of this process are far from complete and require further action among the management and the board. This research was bounded as described to the board, management, and staff as this group of employees has more detailed understanding of Sealaska, as a business, to be able to add rich detail to this question. This is also only one phase of research, once agreement is reached at the corporation a version of this study could be replicated in some form to gather input and ideas from non-Native employees, shareholders, and other Native entities.

Suggestions for Future Work

This process would work well in a mixed method study; as this would be a way to gather additional data around engagement and agreement from a larger group of employees and shareholders at some time during the process. It would be appropriate to complete additional research on Sealaska and Haa Aani within the area of Social Entrepreneurship to confirm whether this is indeed a theory to be applied to Sealaska. In addition, I used a very short version

of this EFR process at the group meeting, which was very effective in identifying similar information to the category/subcategory level information. Additional work could make Ethnographic Futures Research Method a practical tool within organizations working on projects more narrow in scope to show alignment or disagreement on picture of the future, identify key elements or potential barriers, and guide a conversation from definitions to actionable strategies to move toward a shared optimistic future. Finally, additional work could be completed to help indigenous organizations work from this type of foundational data to operationalize the data; to find agreement, to agree upon definitions or to develop a shared picture of success.

In summary, this chapter reflects the final results and contribution from this study, providing a sense of the changing context of Sealaska. In the last chapter, I will revisit the original research proposal and indicate the progress made against this proposal as well as present some final thoughts about the implications this research has for Sealaska and for this area of research.

Chapter VI: Implications of this Research

This study has been a journey; it has been a journey from individual to community, employee to organization, organization to tribe and an organization toward embedding Native values into its DNA. I believe that there are general implications for Sealaska, perhaps other Alaska Native Corporations, and other indigenous groups. Since this is a new question and a unique context for using the Ethnographic Futures Research Method, I believe there are also implications for future research and the field of leadership. In addition, conducting this research has been a personal, practitioner, and professional journey for me. In these last few pages I will summarize the study overall and examine these implications to leadership and my own future development.

As a general summary, the work described as a part of the dissertation has been completed. I began with the pilot with two shareholders who are not employees and learning from that experience went on to interview 12 employees from the designated population within the company. Due to some scheduling and technical difficulties not all 13 planned interviews were completed, yet despite this I believe that I captured the level of data possible and at a level necessary to make the findings presented. Getting one more interview would simply have reinforced the patterns of data, categories, subcategories, and themes that I have outlined in Chapters IV and V. When I was working with Dr. Robert Textor to learn this method, he indicated that when it seemed that I was getting similar information without any real new data or patterns that I had reached saturation and had interviewed the correct number of participants.

When I had completed the literature review in Chapter II, I was concerned that there seemed to be such limited data directly relevant to my study and was thus unsure that my findings would relate to that literature review at all. Much to my surprise, my study augmented

much of the research described in Chapter II from definitions to levels of analysis in values research. I was pleased that my study correlated so closely to work that has been done to date, a fact that helps to confirm that although the data within these general intersections of topics is small, it does seem consistent and applicable. The study does add to the body of theoretical knowledge as it shows real life, practical examples of the definitions, the multiple levels of values and value analysis, and the general complexity of completing studies on this topic.

I was not able to complete all steps initially planned to surface a strategy for integrating values into Sealaska as an operating company. I will discuss this in more detail when discussing the implications of this study. The description obtained from the interviews was detailed and reflected engagement in the topic. Chapter IV shows the general descriptions through the use of categories and subcategories and Chapter V illustrates themes and correlates using direct quotes from the interviews. Although this dissertation does not reflect the final outcomes I expected, it does reflect new ideas based on the Ethnographic Futures Research Method within the context of an Alaska Native Corporation.

Implications for Sealaska

When beginning this study, I formalized the research project on the premise that there would be more clarity around a few options that could then be used to show alignment. Once the analysis was complete I hypothesized that this data could be used to make final recommendations and come to agreement on vision of what Native values look like at Sealaska 15 years in the future. These general research ideals were not achieved and so the distance to a vision of Sealaska in 15 years is much further away than can be described within this project. Reaching that point would have taken an extensive time commitment from the executive team and the board to truly take the next step in creating this strategy, which was not available due to a

multitude of factors. Nevertheless, I have developed several options for using the material from this research, should interviewees consent, to complete this process to agreement on strategy. There are two paths that I recommend be examined further by Sealaska, the first is generating agreement on the specific behaviors or actions that reflect the values, perhaps beginning from some combination of data from this research project and the strategic plan. The second is to look at the strategies generated as part of this study to move the probable scenario toward the optimistic scenario, relate them to the strategic plan and overall priority, and build more detailed plans on the general ideas provided as a part of this dissertation. This research seems to indicate that with the struggles inherent in social entrepreneurship, it is prudent to develop a process to evaluate trade-offs that are difficult for social entrepreneurs, between business and social goals, short-term and long-term results, and generate a focused plan to achieve the agreed upon goals. Should Sealaska want to continue this process, I do believe it will be possible to create a detailed picture that shows how the future of Native values at Sealaska will help guide Sealaska into the next 15 years.

Implications for Alaska Native Corporations and Other Indigenous Groups

It seems there are implications for work with other Alaska Native groups along with other indigenous groups. The first is that this method may be useful within these populations as these issues are certainly not unique to Sealaska. I found that participants, all Alaska Native, seemed comfortable with the process of developing each scenario and after a few minutes of getting used to the grammar and style of talking seemed to move into the role of storyteller to complete each scenario easily.

Implications for the field are twofold from my experience. The first is that the EFR interview itself is a clarifying experience for each participant. At the end of each interview, it

was clear from individuals' comments that they had each moved forward in their thinking about the future of corporation and what it would take to reach that future. The second is that through this process, in an ancillary fashion, I finally understand the true difference between corporate social responsibility and what Sealaska and other Alaska Native Corporations try to achieve, which in my estimation is in line with the idea of social entrepreneurship. I used to define what Sealaska does as corporate social responsibility on steroids, not just being a good neighbor but responsible for contributing to the economic and cultural sustainability of the Tlingit, Haida, and Tsimshian people in Alaska. Corporate social responsibility is seen in general as the "vague intention to better society" (Ludescher & Mahsud, 2010, p. 123), whereas the work of Alaska Native Corporations is targeted to a collective, to the survival of a people with all the benefits and specific perspectives that come with that group, this is business for profit but only on behalf of a people. Sealaska is in business for people not in business for profit. The values being integrated may be the step needed to move from a general idea of corporate social responsibility to a more defined and applicable model. A key component is the acknowledgment of the company's commitment, responsibility, and obligation.

Implications of This Research For Me: Personally, Scholastically, and Professionally

I have learned many lessons throughout this process. As a person, I learned how innovative and optimistic people are when given the opportunity. As a student, I learned the true commitment required to research a question thoroughly and systematically. I have successfully applied the tools and skills learned within the scholarly realm to a real situation. I have also learned to trust the foundational research of others with the understanding that the work I do contributes to that knowledge moving forward.

As a practitioner and researcher, I have learned that the degree to which my own vision of the end product of the research shapes the structure of the research is vital to any future research I choose to pursue. I now understand that vision of the end research product is created in a vacuum without truly understanding the impact the research has on participants and the organization housing those participants. These types of factors cannot fully be understood until the research is underway despite the preparation made ahead of time. This process reinforced for me the idea that research is not objective from the researcher perspective, and thus impressed upon me the importance of acknowledging that the researcher must be aware of their individual bias and opinions when contemplating, implementing, analyzing, and documenting any research project. Qualitative research is a fluid process and will most likely change once within the research process. Finally, I have learned to interpret and analyze data, present those data, and trust myself to understand what can and cannot be completed within one project.

As an employee and a professional working to create change, this project gives me new data and tools to move forward in helping Sealaska operationalize their Native values across the enterprise. In addition, I am inspired by the innovation and optimism shared by participants, this will keep us motivated to find a real, applicable way to integrate Native values into Sealaska.

Conclusion

At the beginning of this study, I hoped to complete a process that helped an indigenous organization become a more effective organization, assisting the organization with gaining clarity on their future and the character with which they choose to move into that future. I chose Sealaska, my regional corporation and my employer. I made the choice of topic with the permission of the executives and the board because I have been raised to try to leave a better future for Tlingit, Haida, and Tsimshian people. I do not believe that the ideas shared within this

dissertation are controversial, they have been discussed in some form for the last two years, but I want to be clear that these words are not meant to offend but to rather help people begin to think differently about the work of Sealaska. I hope that when reading this research, shareholders have a better idea of the complexity Sealaska faces when making decisions and the constraints that exist. I hope they see an entity with vast potential and will become a part of the effort to harness that potential. I hope the larger world looks to Sealaska as a place to learn more about social entrepreneurship. Most of all, I hope that Sealaska succeeds in becoming a leader in integrating Native values into the enterprise. Thanks to one and all for helping make this project a success.

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