

Instrumental and substantive rationalities among different levels of decision making in a samba school: a case study on União da Ilha da Magia

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INTRODUCTION

The organizational studies tend to justify men as part of rational economic system and in that way men becomes a tool in the decision making process of the organizations. The goal of this model of rational decision guided by economy brings the evaluation of alternatives proposed before making a decision, doing a



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study of payoffs and designing a model for the decision of a static case and it is characterized by a rationality tool.

Guerreiro Ramos (1989, p. 121) presents an organizational substantive approach, defends a re-exam of the rationality notion and say that "men can barely be considered a rational being, because the extensive knowledge is beyond his capability¹.

As it is not possible to dissociate the organization from the society it is inserted, the society and the organizations of all sectors influence each other reciprocally. The administration started taking form of science in the 20th century with the need of efficiency gain in the industry. The administrative theories got strengthen in the development of decision making methods and did not pursuit effectiveness in the organizations.

On the other hand, there are organizations with informal characteristics on the economic aspect, whose social appeal has more visibility than its administration structure. It is the case of creative organizations such as music groups, theater groups, certain nongovernmental organizations with philanthropic focus, etc.

¹ Originally in Portuguese: "mal pode o homem ser considerado um ser racional, porque o conhecimento abrangente está além de sua capacidade".

Such social organizations not only reflect the social systems in which they are inserted, but also raise curiosity in the administration science.

Likewise, the post-modernity has been transforming the characteristics of formal organizations, providing a new look upon non-commercial organizations such as soccer clubs, associations and samba schools. For a long time these groups were seen as informal and with no management, today, they professionalize themselves and change the organizational point of view. However, they are susceptible to questioning as: Until what point such organizations abandon their original format and come to form themselves as an organization? Would they be doing the opposite thinking of what is preached by Guerreiro Ramos and be taking the individual as a central category of analysis and orienting themselves to the market?

The social systems build their communities around their specific cultural values. In Brazil, one form of organization stands out for its cultural peculiarities, the samba schools. "The samba school is a cultural practice that processes and organizes social, economic and political relationships from the portion who their

lives together in what we conventionally denominate 'Samba World', translation mine"² (TRAMONTE, 1996, p. 16)

These organizations are originated from carnival, a universal festival absorbed by Brazilian culture and transformed into its grand cultural symbol. The Brazilian carnival (Carnaval) is known as the most popular festival of Brazil, typical of our culture and Brazilian people. Studies on this matter have been disseminated worldwide, mainly through the anthropological and sociological view. This festival in which reigns free the expression, feelings and emotions is coordinated by these organizations known by samba schools.

The picturesque name of the samba school, known and popular in Brazil as nowhere else, names „civil societies of culture and leisure, with no lucrative purpose”, whose main objective is to organize, every year, luxury parades that constitute the essential of current carnival folklore, translation mine³ (QUEIROZ, 1999, 74).

² Originally in Portuguese: "A escola de samba é uma prática cultural que processa e organiza as relações sociais, econômicas e políticas da parcela que aí convive no que convencionamos denominar "Mundo do Samba".

³ Originally in Portuguese: "O nome pitoresco de escola de samba, conhecido e popular no Brasil como nenhum outro, nomeia sociedades civis de cultura e lazer, sem finalidades lucrativas, cujo objetivo principal é organizar, todos os anos, desfiles luxuosos que constituem o essencial dos folguedos carnavalescos atuais".

Under this cultural atmosphere, the samba schools exist for almost a century, certainly suffering changes in their structure, going along political and economic movements in the country. This mixture between popular and private, ludic and official, brings a parallel thought to Ramos rationalities, since the history of the samba schools and carnival themselves present controversial points between freedom and oppression.

The instrumental and substantive rationality theories of Guerreiro Ramos (1989) left a legacy for many academic researchers who were looking for empirical evidence of these theories. The object of study chosen for this research include an organizational arrangement with peculiar characteristics, a Samba School. Although there is a great interest in Brazilian carnival, and a great popularity of the samba schools across the country, few academic studies discourse this object by an organizational look.

The relevance of this study was supported by a research realized on academic databases platforms, in which consultations until January 20th, 2014 identified eleven articles published in scientific journals of Administration that have the "samba school" as an object of study and use an organizational approach. In these publications the authors present studies relating samba school with topics such as organizational management, administration of schools, management control,

innovation, research in management, social capital and public administration, educational tourism, well-being at work and theory restrictions.

In addition to these mixed results, others have pointed out sociological and anthropological studies aimed not to study the object itself as an organization, but the impact of the samba school at the social context. Many other academic studies also focus on the study of music, dance and language, covering topics such as creativity, musical instruments, communication, poetry of sambas etc. In this context, there was a gap on theories related to the activity of the samba schools during Carnival, and those observed as an organization. Was not observed the organizational looking for a Samba School from the point of view of rationalities. The paradox faced by these organizations associated with the carnival define then in a context related with disorder and euphoria. However, while such organizations also survive by resources, and results, it is complex to understand how the rationality of decision-making effectively occur in their management and operation.

Through the rationalities view, the peculiar structure of a samba school, originally substantial, nurture characteristics also functional as it is characterized as an organization. This way, this research proposes to understand: how the instrumental and substantive rationalities relate with each other among different levels of decision making in a samba school? To answer

the given question, the object of the study is the Samba School União da Ilha da Magia, the youngest Samba School in the special group of Florianópolis carnival.

THEORETICAL BASE

Considering that the administrative activity is a collective activity, Simon (1979) presents the administrative process as the combination of several simple tasks, executed to the individual work, which when summed expand themselves to the point of creating the need to developed special processes, so that this effort organizes itself in favor of all, In other words, of the organization. The administrative process is built by techniques that facilitate such effort, so, Simon (1979) brings an approach of rational decision making, keeping in mind that the "economic man" is the responsible for such system. He discusses the limits of rationality in the behavior of human beings.

In the social point of view the rationality can always be classified into a specific kind, taken from the rationality that motivated it on the first place (WEBER, 2004). These kinds comprehend the rational action motivated by the ends, or the so called instrumental rationality, which is determined by the expected behavior of all the agents involved.

The rational action motivated by the values is the substantive rationality to Guerreiro Ramos (1989), and it is determined by the conscious belief of ethics,



aesthetic, and religious values or under any other form that values may manifest themselves, of its own conduct, with no relation to the result. The substantive rationality is also characterized by the affective action, and by the traditional action, which is determined by ingrained habits.

Guerreiro Ramos (1989) affirms that the economic criteria is not the only criteria in rationality. To him the formal organizations are in general experiment fields in which no one has formally consciousness. Moreover, adds to his analysis of the point of view of the individual's acceptance to such rationality that only by inducing the individuals to accept their psychological requirements is that the market system would be able to excel as the most important social sector.

In the organizational studies it is understood that with the evolution of men and the life in society, the people noticed that they could broaden their own abilities working with one another, because in this way they would satisfy their own needs better. With the need to form organizations the administrative activities rise. Wren (1994) evidences the administrative activity since the formation of the first organizations structured by people. To him, to be able to form the first organizations, first there should be a goal; second the people should be attracted to this goal; third each member of the group should have something which to

work or fight for; forth these diverse activities should be structured so that the group meets its goal; and lastly the group realizes that the results are met more easily if there is someone to make strategic decisions and keep everyone's relation around that goal.

Even before the establishment of the administration science, several groups of united people in a form of organization confirmed such characteristics, as the creation of Babylonian laws, the processes of the ancient Chinese dynasties, the grand Hebrew leaders presented on the old testament of the bible, the great Greek and Roman empires, the institutionalization of the catholic church, etc.

The administration science got more developed as the organizations became more complex. With the migration of the field production system to the industries, men comes to engage in areas not inhabited (SILVA, 1990). Along with the organizations growth, the entrepreneur was losing the capacity to supervise the whole process, therefore the levels of supervision emerged. The need of productivity increment and the lack of specialized work force led Taylor (2006) to express the ideas that he took from his own experience and knowledge. This approach aimed to scientifically determine the best methods to the fulfillment of any task, as well as recruiting, training, and motivating the workers.

On this context, Fayol (1989) disserts that to efficiently operate the administrative role, it is necessary to the person to restrict themselves to the employees' team, while other roles need to consider raw material and machinery. The administrative role has as organ and instrument the social body, translation mine⁴ (FAYOL, 1989, p. 43). To this author, it is necessary that a set of conditions, laws, or rules be created to achieve the objectives, denominated principles.

Intending to emerge the theories related to the formal organization as a concrete social process, where the social action is predominantly performed, Barnard (1979) talks about the executive roles and their organization. His theories are not limited to just the industrial or the commercial organizations, but he claims that all categories or kinds of formal organizations are covered in his field of study. Consequently, he selects the functions such as the control, management, supervision and direction, which are performed not only by the people in high positions in the organization, but also by everyone who is in a control position.

The studies on decision making vary among several aspects, it is possible to give emphasis to its content, or study in depth how it occurs inside the organization, or even its level of importance in each organization. To be able to outline the theories on decision-making, Miler, Hickson, and Wilson (2004) mapped several

⁴ Originally in Portuguese: "A função administrativa tem por órgão e instrumento o corpo social".

papers on the topic and studied them looking into two aspects, the action process and the political interest on the decision process. The first involves how the decision process occurs throughout time, and the second is related to the involvement of interests in this process.

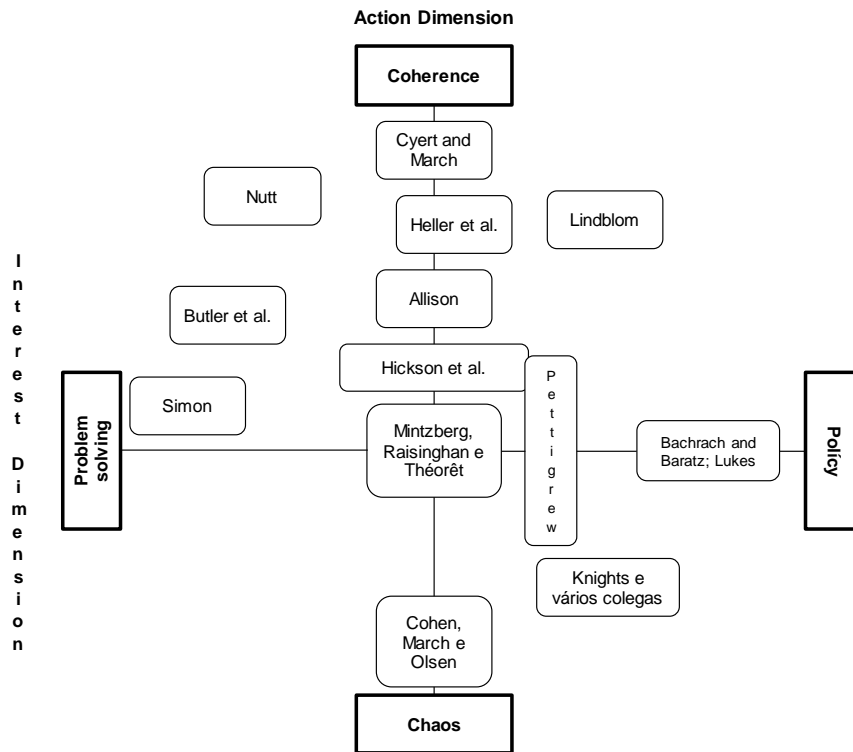


Figure 1 – Mapping of the studies on the decision making process⁵

Source – Miller, Hickson e Wilson (2004).

The common trace studied is the decision concept as essential unit of analysis, its existence and its conflicts. Thus, the thesis of Miller, Hickson, and Wilson (2004) evokes, through the model proposed, the option of a multiparadigmatic and multidimensional decision-making.

⁵ Free translation.

On the other hand, the study of Guerreiro Ramos (2009), while analyzing the sociological thinking in the United States, tries to adapt a model of possibilities according to definitions of the modernity characteristics. Presenting that the definition of modernity is a topic avoided by many authors, Ramos defends that there are underlying characteristics to post-modernity that differs it from modernity, creating two distinct poles called Theory N (H) and Theory P. His research presents seven pairs of propositions to a possibility model with the purpose of being useful to social sciences (GUERREIRO RAMOS, 2009). On the possibilities model, the author defends that in the social sciences an occurred fact cannot be identified as a necessary fact, as presented in theory P, once the scientist needs to see on the historical facts the "human option". This human factor is directly implicated in theory N (H), where the interaction among objective possibilities and human action in the analysis of possibilities.

Guerreiro Ramos (1989) defends the personal interaction in the organization in addition proposes the search of this substantive rationality in organizational relationships. In proposing the substantive approach of the organization suggested primarily an epistemological vision of the organization, relying on the fact that the use of rationality by the individual shall be interpreted according to their familiar design or social content when it is exposed at new situations, since,

in this way will protect himself psychologically. The author states that the economic criteria are not the only criteria of rationality. Proposes that there is a distinction between substantive and formal meaning of the organization. Formal organizations are usually fields of experience in which no one has formally consciousness. He adds his analysis from the point of view of the individual's acceptance to such rationality, says that only inducing individuals to accept their psychological requirements is that the economic system could excel as the most important social sector.

RESEARCH METHODS AND TECHNIQUES

The present case study was conducted with the goal to identify how the decision makers of União da Ilha Samba School relate themselves with the instrumental and substantive rationalities in the performance of their jobs. To achieve such goal, categories were created through the standards established on the theories in order to confirm the suppositions of Guerreiro Ramos' (1989) theories.

The case study focuses on researching the way by what method a group of people relates to assured a theory or problem. A case study is the strategy chosen to examine contemporary events, when the relevant behaviors cannot be switch. Thus, this research is conducted as an interpretive case study to find

patterns in the data and develop conceptual categories that may allow illustrate, confirm or oppose theoretical assumptions (GODOI, 2006).

The research adopted was a qualitative one, which presents the following characteristics explored by Creswell (2010): the data gathering is done in the subject's natural environment; the researcher themselves is the one who gathers the data personally; multiple data resources are used such as interviews, observation, and documents; the researcher creates their own standard through an inductive process; the researcher's focus is on the meaning of the topic to the participants and not the themselves; it is an emerging process, in which the phases can be changed depending on the presence of the researcher in the environment; theoretical lens are used to analyze the study; it is an interpretive form of investigation; and the researcher aims to accomplish an holistic report, where they attempt to develop a complex table of the study problem.

The analysis categories of this dimension, which are considered to the performance of this research, are based on two concepts: the Instrumental Rationality as a recognized action used as a way to achieve a certain goal, or the social life dictated by economy; and the Substantive Rationality as a recognized action used to achieve a human need, or the social life ordered by human psyche.

The study of the presence of rationalities in an organization has to take into consideration the organizational decision-making.

In order to define and outline the field and participants of the research a deeper knowledge of the study environment was necessary. The G.R.C.E.S⁶ (abbreviation of the name in Portuguese) União da Ilha da Magia was selected among the Florianópolis samba schools due to its effective results on the last carnivals, and for presenting, at first, a favorable organizational structure to the study.

The chosen Samba School has a recent history in Florianopolis carnival, but already draws attention for results and for their organization. Young organization, founded by young people, has become the focus of this research by the proximity of the researcher in their daily activities, also part of the coordinators structure. The sample of respondents followed the criteria to interview those who are part of the decision-making of the organization in different ways. The number of respondents corresponds to all members that fit these criteria. In other words, all the ones that were formally occupying a leading role of a certain process. In short, they were the ones responsible for some kind of decision-making. From the organization authorization to execute the research, the members, which were considered indispensable to the

⁶ Recreational and Cultural Guild of the Samba School.

achievement of the research goals, were selected. Erro! Fonte de referência não encontrada. shows fourteen participants interviewed:

Table 1 – List of functions interviewed to the research

Area/sector of organization	Respondents	Functions
Directory	5	President, vice-president e directors
Council/Harmony	1	Harmony Coord. / Council Pres.
Percussion Band	1	Master of Percussion Band
Allegories	1	Floats Coordinator
Performers	1	Performers Coordinator
Front Commission	1	Front Commision Coordinator
“Mestre-sala/porta-bandeira” (flag holders)	1	MS and PB coordinator
Musical Equipment	1	Musical Equipment Coordinator
Choreographed ala “block”	1	Choreographed block Coordinator
Communication	1	Press Secretary

Source – Research data.

On this study, the organization is defined as an analysis unit. For the secondary data gathering the following procedures were done: bibliographical research with search on data bases and deepening on the main authors who approach the study topic; documental research in official documents of the Samba School in question, such as meeting minutes, statutes and record of activities; and the documental research in official documents in the institution that regulates Florianópolis Samba Schools, the Florianópolis Samba Schools League (LIESF, abbreviation of the name in Portuguese).

For the primary data gathering, the direct observation was used on the rehearsal and parade of the Samba School. The direct observation is where the investigator themselves will gather information in the field, without being in contact with the people in question (QUIVY, 2008). Besides, a deepening interview with samples of participants of the decision-making levels of the organization was performed.

The inductive approach, characteristic of qualitative studies, does not obey a logic sequence to the methodological facts, in other words "the analysis and interpretation of the data will be made in an interactive way with the gathering, going on throughout the investigation process, translation mine"⁷ (ALVES-MAZZOTTI, 1999, p. 162). This way, the chronogram presented mixes the steps so that an exploratory step from the documental research and direct observation can serve as a base to the focalized investigation, in which the interview method will be used.

The inductive method aims to organize and comprehend the volume of data created on the research. This is a complex process, not linear, which implicates working in reduction, organization and interpretation of data that is already

⁷ Originally in Portuguese: "a análise e a interpretação dos dados serão feitas de forma interativa com a coleta, acompanhando todo o processo de investigação".

started in the exploratory phase and goes on throughout the investigation, translation mine⁸ (ALVES-MAZZOTTI, 1999, p. 170).

In order to identify the different levels of decision making in the organization in question, the observations and interviews aim to indicate, according to the Mintzberg's (2003) model, the basic parts of an organization as well as identifying in the object of study characteristics found in formal organizations, as the suggested model in Figure 2.

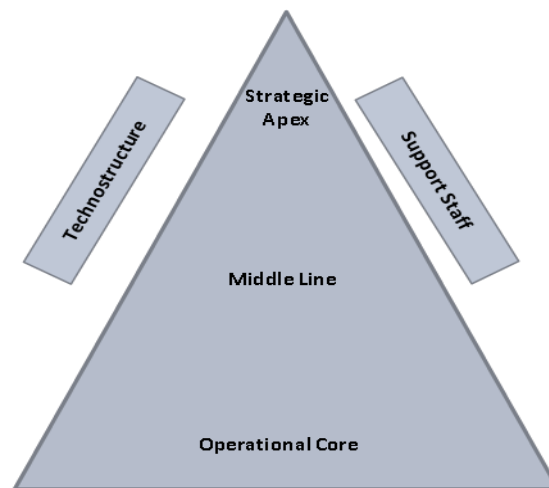


Figure 2 – The five basic parts of the organization

Source – Adapted by the authors from Mintzber (2009).

To be able to verify the expression of substantive and instrumental rationalities in the decision-making process the discourse analysis was used as well as the interpretation of the data documented and observed. In such identification, the

⁸ Originally in Portuguese: “Este é um processo complexo, não linear, que implica um trabalho de redução, organização e interpretação dos dados que se inicia já na fase exploratória e acompanha toda a investigação”.

following indicators were adopted under the view of the rationalities from Guerreiro Ramos (1989) and Polanyi (2000). In an objective and reductionist way, a list of qualitative indicators of substantive and instrumental rationalities were elaborated and represented in the table 2, which finds its base in the mentioned authors.

Five dimensions were defined to analyze the relation of the rationalities to the decision making so that the research guidelines could be built. These dimensions made possible the elaboration of a model that permitted the transversal analysis of the rationalities, which allowed the collating of the Mintzberg's (2003) model, which corresponds to the five parts of the organization presented in Figure 2, and the qualitative indicators of

Table 2.

Table 2 – Qualitative indicators of substantive and instrumental rationalities

Substantive Rationality	Instrumental Rationality
Focus in the process	Focus in the result
Unpredictability	Predictability
Instability	Stability
No measurement of efforts	Calculates consequences
Qualitative	Quantitative
Reciprocity	Redistribution
Personal Satisfaction	Financial Recognition
Ethics Values	Economic Values
Volunteer	Mandatory
Intangible	Tangible

Source – Research data.

In this sense, the subdivision proposed in the analysis model in table 2 suggests the characterization of indicators that could be understood as diverse dimensions in which the decision maker is inserted.

Table 3 – Transversal analysis model of rationalities.

	Middle line and Support Staff	Strategic Apex
Function/Position in the organization	Analysis of the rationalities in the decision making of the middle line and support staff in each studied dimension.	Analysis of the rationalities in the decision making of the strategic apex, in each studied dimension.
Organizational Process		
Feedback		
Role in the Organization		
Motivation in the organization		

Source – Research data.

Originally, this stratification came from: the function or position occupied, the organizational process corresponded to its directed involvement with the function performed (time, deadlines, result indicators etc.); the return of information to the understanding of the hierarchic positioning in the condition of feedback or evaluation; and the career perspective. The latter indicator is divided in two dimensions, the role of the actor researched in the organization, which transcends the limit of position or function, and the motivation of the actor researched in acting in the organization.

The analysis models allow a more clear transcription of the research data as well as transmit in a more didactical way the researcher's analysis. These tools try to contribute to a better comprehension of the research.

As this is a qualitative research that depends on observations and interviews, the researcher-subject interaction can be considered a limit to research and its analysis. This direct interaction with the process is seen as limit to research in its methodological context and chronogram. However, it is important to highlight that such interaction, based on the main theoretician used on this research, Guerreiro Ramos (1989), is motivated in his theory among social scientists and their practices.

Without being a protagonist in the social process it is not possible to be fully a social scientist. The idea of a thinking separated from its practice



is a contradiction of terms. There is no thinking without a rudiment of practice, nor there is practice without a rudiment of theory, translation mine⁹ (GUERREIRO RAMOS, 2009, p. 54)

Accordingly, the limits of this research are known and considered to the analysis end. To treat this bias, a methodological rigor guides the research in an effort to give more accuracy to the applied social sciences.

It is important to emphasize that this study did not have as focus to analyze the aspects of the effectiveness of the decision making itself, once the tools of decision-making are not being studied. Therefore, the decision-making is treated as boundary of the research to the study of substantive and instrumental rationalities over its actors.

ANALYSIS AND DATA INTERPRETATION

The results of analyzes of primary and secondary data collected are presented in two major areas of analysis: a samba school as a social culture and organizational structure, and the rationalities in the decision making of the samba school.

⁹ Originally in Portuguese: "Sem ser protagonista no processo social não se pode ser integralmente um cientista social. A ideia de um pensar separado da prática é uma contradição de termos. Não há pensar sem um rudimento de prática, nem há prática sem um rudimento de teoria".

The samba school as popular culture and organizational structure

The carnival is surrounded by beliefs and mysticism, the word itself refers to different meanings depending of who is interpreting it. One of the definition to carnival refers to the period of profane festivities rescued by Christianity, and its etymology according to Houaiss and Villar (2001) comes from the Latin word *carnelevāre*, which means “meat abstention” and would indicate the day before Ash Wednesday, day in which the abstention of meat would begin, also called lent. In the current and most popular definition, carnival is the “set of typical festivities, parades and entertainment of this time of the year, in which participants typically wear costumes and masks, translation mine”¹⁰ (HOUAISS; VILLAR, 2001, p. 629).

The Samba Schools are originated from carnival, a universal festival absorbed by Brazilian culture and transformed into its grand cultural symbol. The Brazilian carnival (Carnaval) is known as the most popular festival of Brazil, typical of our culture and Brazilian people. Studies on this matter have been disseminated worldwide, mainly through the anthropological and sociological view. This festival is known popularly as “a special party that is also a jubble, a

¹⁰ Originally in Portuguese: “conjunto de festejos, desfiles e divertimentos típicos desta época do ano, nos quais os participantes tipicamente vestem fantasias e usam mascaras”.

confusion, a mess. A moment in which the rules, routine and procedures are modified, reigning free the expression of feeling and emotions, when everyone can manifest themselves individually, translation mine"¹¹ (DAMATTA, 1997, p. 157).

Historically, the formation of the carnival in Brazil is told in three stages. The parties were initially known as Shrovetide or Shrove Tuesday, popularized from the half of 19th century on, these parties, which were specific to the urban areas, were already marked by the rivalry among class competition. It was not permitted, for instance, that a slave to throw flour or any other party artifact on a free man, although the opposite was allowed. (QUEIROZ, 1999)

Next, these parties were influenced by the Venice carnival, starting the grand balls. The carnival was conducted by classical music and based on the expression of great literature artists. This period marks the emergence of the Carnival Societies and its celebration by the elite. The third stage is known as Popular Carnaval, marked by the arrival of the "cords" ("cordões", originated from the religious processions) and from the "ranches" ("ranchos"), both being manifestations from the emancipated black people, poor and immigrants that

¹¹ Original in Portuguese: "uma festa especial e também uma trapalhada, uma confusão, uma bagunça. Um momento em que as regras, rotinas e procedimentos são modificados, reinando livre a expressão dos sentimentos e das emoções, quando todos se podem manifestar individualmente".

started organizing themselves to also be part of the party, including then the African music. (TRAMONTE, 1996)

The samba appears from an adaptation process of the musical forms of African culture. "The samba, is result, thus, of the redevelopment process of the musical forms of black Brazilian culture, translation mine"¹² (TRAMONTE, 1996, p. 31). On this context, in the beginning of the 20th century, with several suburb communities composed by slaves, the first samba school emerges with Estácio de Sá, "Deixa Falar" was founded in 1928.

The first Samba School contest came from a journalistic initiative, the newspaper "Jornal Mundo Desportivo" created and regularized the contest which happened at Praça Onze, in Rio de Janeiro. Former members of "Deixa Falar" spread among associations in Rio de Janeiro, including the association rooted in Morro da Mangueira, cradle of one of the oldest Samba Schools among the current ones, the Estação Primeira de Mangueira (GALVÃO, 2009).

Under this cultural atmosphere, the samba schools exist for almost a century, spread throughout Brazil, certainly suffering changes in their structure, going along political and economic movements in the country, besides adapting to each social reality. Blass (2007) compares entities that represent a slice of the called

¹² Originally in Portuguese: "O samba, é resultado, portanto, do processo de reelaboração das formas musicais da cultura negra brasileira".

Brazilian “cultural identity”, carnival and soccer, comparing the samba schools, which represent the carnival festivities, to soccer teams, which represent the most popular sport in the country.

In Florianópolis the carnival followed the same movement, with some differences on the chronological aspect as well as social and political context. Up until the beginning of the 20th century Florianópolis carnival (old Desterro) was celebrated by white people and marked by the European influence and by the exaltation of luxury in the carnival societies. Influenced by the songs played on the radios by Estácio de Sá and Rio de Janeiro Samba Schools, the first carnival blocks of Florianópolis emerged, around 1938. In 1949 residents of Morro da Caixa, who were mostly sailors from Rio de Janeiro and Bahia, founded the first Samba School of Florianópolis, the Protegidos da Princesa, starting with simple parades that looked like carnival blocks, which initiated a movement that years later resulted in grand parades and the foundation of other samba schools as well as the inauguration of a passarela – “samba stadium” or “Sambadrome” where the parade with the official samba schools walk through, in 1989, the Nego Quirido (RAMOS, 1997).

The youngest of the Samba Schools in Florianópolis is the União da Ilha da Magia Samba School. Its history begins in 1993, when a group of friends inspired by

Banda da Lagoa, a band that would put on shows around a neighborhood called Lagoa da Conceição, got them motivated to buy instruments and rehearse, dreaming about joining the band one day. This dream came true in 1994, while everyone was living the energy of the World Cup finals, in which Brazil was the champion, the friends were celebrating the achievement of receiving an invitation to play along with their dream band. In 1996 they created a percussion show, which in a short time became one of the biggest attractions in town.

With its popularity, the percussion show gave place to the União da Ilha da Magia Carnival Block, founded in May 13th of 2000, reaching big proportions and promoting wild street parties in Lagoa da Conceição, involving the carnival participants (“foliões”) with a lot of joy and music. Motivated by their success, in May 13th of 2008, at the Praça Bento Silvério, the Recreational and Cultural Guild of União da Ilha da Magia Samba School was founded, also called UIM.

The UIM made its first parade in February of 2009. With 2.057 components it brought to the Sambadrome the theme “The lagoon of my dreams” in homage to its neighborhood of origin. In 2010 with the theme “The Magic of the gods” and it got good visibility taking 2.500 components to the Sambadrome, year that it received the second place in the contest. In February of 2011, with the theme “Yes Cuba! In name of the truth” the UIM turned the Nego Quirido Sambadrome into an

emotional battlefield and conquered the first place in the contest being this just its third parade as a samba school.

In the 2012 Carnaval the UIM prepared the theme "A Beautiful Story" ("Una Bella Storia"), which told in the Sambadrome the love story among Italy and Brazil, and starting the parade to the Tarantela song it conquered the first place for the second time. As the carnival parades did not happen in Florianópolis in 2013, for the year 2014 the school went aboard on a trip with one of the biggest artists of all times: Bob Marley. It is on this atmosphere that this research was accomplished, having carnival on the background and an organization searching for effectiveness.

The sectors of this organization were identified through the analysis of documents, observation and testimony of the executive board of directors. According to the theory raised by the analysis model defined based on Mintzberg (2003), the formal structure found is defined according to Figure 3.

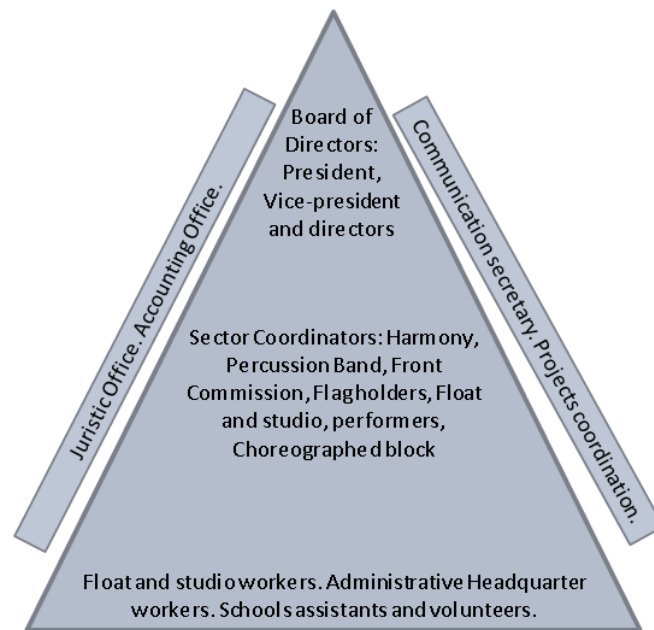


Figure 3 – Formal Structure of União da Ilha da Magia

Source – Mintzberg (2003).

This organizational structure can be called institutional structure, in it, it is explained the decision hierarchy of the organization as an institution, in other words, the executive board of directors, located in the strategic apex, is responsible for elaborating the whole year planning and deciding about hiring the people who will be responsible for the remaining sectors of the school. As they work in collegiate, they are a fixed board of directors, which alternates positions and responsibilities every two years through internal election, according to the Samba School statute and also said in this research by the respondents.

The Samba School also presented another formal structure, however hierarchical differently from the first, which happens on the moment of delivery of its main product: the carnival parade.

At this moment, a change on its hierarchical structure is noticed, considering that the board of directors has performed all its functions in planning and execution throughout the year, and at that moment “gives” to the operational base, the execution of the project and all the decision making is on the hands of the respective coordinators responsible for each sector, subordinated only to the Harmony and Evolution Coordination, which has as main objective to make the parade happen according to plan, or, as said in the samba language: “put the school in the Sambadrome”.

Relating to the Figure 3, the coordination comes from the middle line to occupy momentarily the strategic apex. They keep their functions, although, at that moment of the “product” delivery, the samba school sees the Harmony and Evolution Coordination as the highest level of decision-making, and respects the total autonomy of the percussion band coordinators, front commission, flag holders in their respective functions.

Furthermore, it is possible to observe that the functions performed in the Samba School, for instance the executive functions presented by Barnard (1979), are not organization systems, but cooperation systems. Since they use creation, transformation, and value exchange functions, presenting an organizational format of a nucleus as well as secondary system.

The rationalities in the decision making of the samba school

After collecting evidences of each rationality in the adopted dimensions, the Table 5 presents the definition of which rationality predominates in each studied dimension, separated into two decision levels, the Strategic Apex, represented by the executive board of directors or high administration; and the Middle line and Support Staff, represented by all the remaining coordinators of interviewed sectors. Such format allowed a transversal study of the characteristics found related to each decision making level.

Analyzing just the middle levels it is noticeable that from the five dimensions studied, only one, function/position, in the organization had really an instrumental discourse. This dimension presented a worry to detail the functions and results intended to which they were hired for.

The dimension Organizational Processes also presents instrumental rationality discourses, but it presented itself as consequence of the first dimension, as an effort to formalize their function, although the practical discourse of this dimension shows to be strongly influenced by the substantive rationality. Therefore, the organizational process can be considered divided by both rationalities, having its practice closer to the substantive rationality.

The following dimensions, feedback, role on the organization, and motivation, present predominantly on their discourses the presence of substantive rationality. Such characteristics are highlighted by qualitative indicators, unpredictability, focus on the process, justification of not measuring efforts, basing their actions on ethics values, activity reciprocity, and mainly, personal satisfaction.

At the same time, the observation allowed to know the daily activities of these actors. Although contracted for specific functions, all coordinators are involved with the organization as a whole. It was verified in practice, in practice events or even on the day of the parade, the specific functions prevail under the dominance of rules set by competition. But the actions vary according to the organization's needs, there are several times when actors from different areas

come together to end a group of costumes, for example, or arrange a specific moment at the practice event.

These actions prove the Guerreiro Ramos (1989) idea: to find that the personal challenge, the need to belong to the organization is greater than the actual exercised function or position, thus coexisting the two rationalities, but the substantivity predominates.

In short, a general analysis of the table leads to the conclusion that from the dimensions studied on this organization, the substantive rationality prevails in the decision makers of the middle line.

Table 4 – The rationalities of decision-making

	Middle level of Decision making	High Administration
Function/position in the organization	The designing of the functions is clearly and consequently moved by the functional rationality. The present indicators point a worry from the organization in, precisely, make this dimension more functional. The main indicators found are: focus on the result, predictability, consequence planning, redistribution and finance recognition.	The designing of the board of directors' functions is clearly moved by the functional rationality. Their functions and model to decision making are established in statute. The main indicators found are: focus on the result, predictability, stability, consequence planning, redistribution and the definition of mandatory functions to each member of Executive Board of Directors.
Organizational Processes	Even though many coordination do not show formal organizational processes, the discourse of the ones interviewed was going in the direction of trying to achieve the formal goals to a functional characterization. The speeches about	The organizational processes are seen by the strategic apex mostly in a functional rationalist way. Their dedication time is counterbalanced with their professional life, the available deadlines are attached to the government decisions and the

	<p>dedication time into their functions showed an effort to formalize their dedication in predictability and in economic values. However, there is a substantive reality in the unpredictability and instability of the activity, especially during carnival, when there is a delivery beyond functional reasons, measuring no efforts.</p>	<p>decision making is decentralized through a collegiate board of directors and the division of functions.</p>
Feedback	<p>Mostly substantive rationality based on the discourse analysis of the ones who ignore the formal ways of evaluation and use substantive methods, justified by the following indicators: focus on the process, unpredictability, instability, no measurement of efforts, qualitative analysis, reciprocity, and ethics values. With little presence of functional indicator related to the obligatoriness of the function, focused on the result expected by the board of directors.</p>	<p>Outstanding presence of functional rationality, having as main evaluation tool for their results the grades received by the committee which evaluates the carnival parade and the annual evaluation meeting. The predominant indicators are: focus on the result, consequence planning, predictability, quantitative analysis, redistribution and economic values.</p>
Role in the organization	<p>Predominant presence of substantive rationality, justified by the following indicators: ethics values, personal satisfaction, reciprocity, qualitative indicators and the performance of their function with no measurement of efforts. A big disappointment in the organization is pointed to be the main reason of abandoning the role performed.</p>	<p>Predominant presence of substantive rationality, justified by the following indicators: volunteering, ethics values, personal satisfaction, reciprocity, qualitative indicators and the performance of their function with no measurement of efforts.</p>
Motivation	<p>The sentence: "love what you do" appears frequently. The main motivations are justify with words strictly substantive such as pleasure, emotion, love, satisfaction, and self-esteem. The substantive rationality prevails, with brief comments of two of the interviewed about financial support which goes along with the pleasure to</p>	<p>The sentence: "love what you do" appears frequently. The main motivations are justify with words strictly substantive such as pleasure, emotion, love, satisfaction, and self-esteem. There is evident predominance of substantive rationality.</p>

	perform the activity.	
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Source – Research data.

Analyzing only the high administration level, it is noticeable that there is a bigger presence of instrumental rationality in three specific dimensions, position/function (as well as on the middle line), in the organizational processes and on the evaluation or feedback. These three dimensions show a strong functionalist discourse, in which are presented statutory indicators and rules, emerging a worry in following models and an operation tied to regulating organs and government. The feedback is done through a careful result analysis, showing thereby indicators of focus on the result, consequence planning, quantitative analysis and economic values as determining.

Despite showing a strong instrumental rationality, the high administration presented equivalent discourse to the middle line in two dimensions: role in the organization and motivation. In both, the discourses of the interviewed, independently from the position in the organization, had a strong presence of substantive rationality. The high administration is marked by volunteering, personal satisfaction and ethics values.

It was evident the difference in expectations about the results of the decision-making levels. The components of the strategic apex feel the responsibility to

demonstrate the samba school as a formal organization, organized, and the topics that demonstrate this credibility are the same ones that is driving companies, in order to institutionalize this organization. However, for the intermediate level coordinators, they feel valued by the wider community, beyond the parade, seek the acceptance of society and the recognition of the carnival community, a factor that this research could not measure or recognize criteria, such its substantivity.

In summary, an analysis of Table 5 evidences that among the dimensions studied on this organization, the instrumental rationality prevails in the decision makers of high administration, while the substantive rationality is presented more effectively on the intermediate levels of decision-making.

RESULTS CONSOLIDATION

Based on the verification of the substantive and instrumental rationalities in the decision making process, it was opted to structure three forms to comprehend this Samba School.

Considering the comprehension of the actors involved, it was noticed that the Samba School was understood according to three diverse contexts: The Samba School as Organization, which for the actors represent the whole, in other words, the Samba School as an institution/business; the Samba School as Operation, which refers to the processes, the activities and actions engaged in order to achieve the expected results; the Samba School as Administration, to which the actors report has been the main ruling body, or a strategic management of the Samba School.

While Organization, the perception of substantive rationality expression is alive on its practice, as it demonstrates a discourse preponderantly qualitative. However, it is quite influenced by the instrumental rationality on the discourses, which is constituted naturally by the organizational characteristic of efficiency search and the theories that follow, determining a required formal structure and its necessary tools. These organizational efficiency tools are presented in the discourses, as an ideal form of samba school, still not lived in practice though. This

characteristic is outstanding on the discourses in an effort to “professionalize” the Samba School organization.

It is important to emphasize that it is not only from a discourse merely qualitative that the substantive rationality is evidenced, but also from the crossing of indicators based on the perception of the actors involved.

While Operation, a strong acting of the substantive rationality happens. This perspective has as base the processes and the people, bringing a qualitative discourse, with focus on the processes, thus the efficiency gives place to the effectiveness, and the indicators of operational success are based on ethics values. The personal satisfaction follows all the operational practice, which is strongly attached to the carnival parade.

While Administration, there is a strong acting of the instrumental rationality, bearing in mind that the Executive Board of Directors execute their activities guided firstly by government definitions, and by the private sponsorship that the organization is under. The predominant discourse is based on the organization’s annual budget and its strategic actions are strongly adapted to it. With the objective to present this crossing in a more didactic way, this perspective was united on the following table.



The research made possible to ratify that not always organizations are totally subjective when interpreting only its focus, the process or organization. Reinforcing that it is not the qualitative discourse that transforms a decision in substantive, but the praxis of this qualitative discourse in the administrative action.

Table 5 – Instrumental and Substantive Rationalities
in the União da Ilha da Magia

The Instrumental and Substantive Rationalities in the União da Ilha da Magia Samba School		
Organization	Operation	Administration
The organizational dimension shows to be divided. It presents a discourse quite instrumental, in an effort to “professionalize” the Samba School activities, as well as create compatible methods to the functions of traditional organizations. However, there is a substantive reality, in which its members act in an unpredictable way and with strong ethics values. The dedication goes beyond obligation and its recognition extrapolates financial recognition. This dimension shows to be substantive on its practice and instrumental on its discourse.	The operation of this organization showed the existence of a reality with predominant qualitative characteristics, deeply guided by ethical values and personal satisfaction. Bearing in mind that there are volunteering activities that simultaneously happen in a natural way and carry a dedication beyond limits. Therefore, there is predominantly the substantive rationality on its operation.	The administrative dimension showed to be predominantly moved by instrumental rationality. The decisions are elaborated in consequence to external rules from government and funds from private companies.

Source – Research data.

It is noticed that in the context of empiricism and idealism associated to a Samba School, in the search of reinforcement to a reason not pure in Kantian perspective (NIQUET, 2008) as the decision is grounded in values, there is an outstanding instrumental rationality presence. This derives from the learning of administrative functions.

As in the administrative, the strategies on the parade are equally moved by external agents and followed functionally, as in the case of the rules established by the Samba Schools League. The minimum requirements to the parade, as for the evaluation criteria to each section are summarily considered in each decision of the strategic apex. This sector performs quantitative evaluations, use indicators with focus on the results, evaluate consequences and the economic values as determinant, in order to maximize the resources received. Paradoxically, at the moment of the parade there is a materialization of the scientific administration.

FINAL CONSIDERATIONS

This research had as a broader purpose to understand how the instrumental and substantive rationalities behave in different level of decision making of the União da Ilha da Magia Samba School. The field research made possible the identification of characteristics of a formal organization, which differs it from the many traditional organizations studied.

The first characteristic that actually outstands revealing a strong difference from the substantive and instrumental rational practice in the Samba School organization is translated in the coexistence of two organizational structures: the formal institutional structure and the operational structure. In them there is the participation of the same agents, however, in conformity to the inversion of powers depending on the structure that is observed.

Paradoxically, the operational organizational structure showed to be little or nothing of instrumental, in the rational point of view. Ratifying this information, in the main school object, which is the carnival parade, the leadership of the organization migrates from the formal institutional structure to the organizational structure.

This organizational phenomenon could be related to the phenomenon of social positions dissolution that characterizes the days of partying of this national holiday, the carnival.

As it is re-approached by Da Matta (1997) when comparing the carnival parade to the country holiday.

The discourses on the Country Day and on carnival are, therefore, related with each other through a logic apparently simple. On the Country Day, there is a reinforcement to hierarchy, which is carried out in an opened way and manifested in the beginning and climax of the happening [...]. On carnival, however, the party emphasizes a dissolution of the systems of roles and social positions, since it inverts them throughout the event, there is a return of these roles and positions systems in the end of the rite though, when people dive into daily world again, translation mine¹³ (DAMATTA, 1997, p. 69).

When assessing the intermediate and basic levels of decision making with the high administration in the matter of the organizational function, procedural,

¹³ Originally in Portuguese: "Os discursos do Dia da Pátria e do carnaval estão, pois, relacionados entre si por meio de uma lógica aparentemente simples. No Dia da Pátria, há um reforço da hierarquia, que é realizado de modo aberto e manifesto no início e no clímax do acontecimento [...]. No carnaval, porém, a festa enfatiza uma dissolução do sistema de papéis e posições sociais, já que os *inverte* no seu decorrer, havendo, contudo uma retomada desses papéis e sistemas de posições no final do rito, quando se mergulha novamente no mundo cotidiano".

feedback, performed role and motivation in the organization, it was noticeable that preponderantly in the dimension function/position of the organization the instrumental rationality is transverse, in the high administration as well as in the intermediate lines of decision making.

When people talked about motivation towards work and the role/career in the organization, which probably is different from many formal organizations, the substantive rationality also migrates transversely on the two extremes of the decision making. On the other hand, in the dimension of organizational processes and feedback, the reduction is done inversely, while to the high administration these dimensions present big instrumental rationality, to the intermediate levels the substantive rationality is predominant. In general, the analysis could verify that there is a strong expression of instrumental rationality on the highest level of decision-making, and inversely, a strong expression of substantive rationality in the intermediate levels.

Related to the praxis of the substantive and instrumental rationality in the decision making process, it was possible to identify three "types" of samba schools, the Samba School as Organization, the Samba School as Operation and the Samba School as Administration.

While Organization, the perception of substantive rationality expression is alive in its practice, but it is also quite influenced by the instrumental rationality on its discourse, especially on the effort to “professionalize” its activities.

While Operation, a strong acting of the substantive rationality happens, its operation is strongly attached to the carnival parade and among its activities, the justifications of ethics values and personal satisfaction are predominant.

While Administration, there is a strong acting of the instrumental rationality, since there is strong discourse in following models and an operation tied to regulating organs and government, as it also makes quantitative evaluations, use indicators focused on the result, plan consequences and have the economic values as determinants.

Considering as a base the referential of Mintzberg (2003) to the purpose of analyzing the relationship of the rationalities to the decision making, it was possible to ratify a perspective of the instrumental rationality on the high levels of decision making, in other words, an instrumental rationality way more patent and evident on the decision making processes of the Executive Management of the União da Ilha da Magia.

Otherwise, on the intermediate levels it is presented predominantly characteristics of substantive rationalities, in other words, a substantive rationality much more patent in the decision-making processes of the sector Coordinators of the União da Ilha da Magia. With punctual exceptions of the coordinators who are professional choreographers, whom bring with them the rationality of such function in their activities in the school. Actually, from all the substantive axis that was expected to be found on the parade, the substantive formality permeates clearly on the choreography, besides the outstanding technical function of the Harmony and Evolution Coordination when performing the activities of coordinating and timing the parade.

In the discourse comprehension of the substantive rationality and the instrumental rationality inside the decision making process of an organization such as a Samba School, the final paradox is that although the criteria of quantitative and qualitative analysis which leads to the title of Carnival Champion to the Samba School is a beacon to the parade, it is not a determinant to the lives of whom is inside a Samba School. Ratified in the discourse:

On the day of the parade a random tragedy can happen and something can go wrong there, and because of that, put a job, which could have been well done throughout the year, because of an ordinary mistake, to

be poorly evaluated. Being judged there in the Sambadrome is kind of weird, translation mine¹⁴ (Master of Percussion Band).

This way, it is increasingly noticeable the detachment from the organization decision makers from the formal organizational structure on the delivery day of the main Samba School product, the carnival parade. When observing the administrative functions and analyzing the Samba School and its interaction with the instrumental and substantive rationalities, it was possible to conclude also, that independently from the rationality which the decision making aspect is under, even with the big influence of the substantive rationality, paradoxically it is on the sambadrome, during the parade, that it preserves clearly the postulates of scientific administration, in the role performed inside each sector of this organization.

About this study limitation, the person of the researcher at the time of research, as coordinator at the organization of study, certainly exerted impact on the conduct of this research. This function requires a direct treatment with all sectors of the Samba School, thus facilitating the contact and access to all decision-making levels for the interviews, and promoting greater research fluidity. As

¹⁴ Originally in Portuguese: "No dia do desfile pode acontecer uma tragédia qualquer e dar alguma coisa errada ali, e por aquilo colocar um trabalho, que pode ter sido bem feito o ano inteiro, e por um erro qualquer ser mal avaliado. Ser julgado ali na avenida é meio esquisito".

well as access to documents and direct observation was carried out for the main activities and meetings of the organization.

However, the same factor can also be considered as a limiting for research because such access can influence respondents, which can, at times, confusing the role of researcher and coordinator. At the same time, many theorists believe that it should not be treated as limiting the research, by the subject and object interaction. Considering that in qualitative research the researcher is the primary data collection source and has a direct interest in all phases of research and data analysis. Despite possible limitations, argues the researcher's role as a social scientist, encouraging the integration of theory with practice.

By the schedule limitation for research, this has merely investigate the rationalities involved in the organization's decision makers, however, it turns out that to complement the vision of rationalities in this organization, it is interesting to propose studies that reach also the operational base, which would involve the workers and the hundreds of volunteers involved. In addition, it is proposed that this substantive looking encouraged by Guerreiro Ramos, in atypical organizations fleeing off to the institutional structures. With this observation, it may take a step further to this study, identify such objects of study outside the organizational ties, trying a view that the traditional organizational structure is

naturally accompanied by instrumental rationality, and that the substantive rationality is manifested beyond the structures.

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ATTACHMENTS



Figure 4 – União da Ilha da Magia, 2012 parade

Source – UNIAO DA ILHA DA MAGIA (2014).



Figure 5 – União da Ilha da Magia, 2012 parade

Source – UNIAO DA ILHA DA MAGIA (2014).



Figure 6 – The flag holder and the official organization flag, 2011 parade

Source – UNIAO DA ILHA DA MAGIA (2011).



Figure 7 – The master of percussion band and the queen of the
percussionist, 2012 parade

Source – UNIAO DA ILHA DA MAGIA (2014).



Figure 8 – Front commission's choreographer and dancers, 2012
parade

Source – UNIAO DA ILHA DA MAGIA (2014).

Instrumental and substantive rationalities among different levels of decision making in a samba school: a case study on União da Ilha da Magia

Abstract

This research aim to understand the relationship between instrumental and substantive rationalities on different levels of decision making in a samba organization. The main objective was accomplished through a research on a Samba Organization in the city of Florianópolis. With research through documentary analysis, direct observations and interviews, the question of rationality emerged as a prominent topic for the decision-making activity of the organization. The predominance of instrumental rationality on the was evident on the discursive practices of decision makers, and, substantive rationality at intermediary levels of decision making. It was found that, paradoxically, in the event of the carnival parade, the leadership of the organization migrates from a recognized formal institutional structure to the operational structure.

Keywords

Third Sector. Samba Organization. Decision making. Instrumental rationality. Substantive rationality.



Racionalidades instrumental e substantiva nos diferentes níveis de tomada de decisão em uma escola de samba: um estudo de caso na União da Ilha da Magia

Resumo

Este estudo discute a relação entre as racionalidades instrumental e substantiva nos diferentes níveis de tomada de decisão de uma escola de samba. Tal objetivo efetivou-se mediante uma pesquisa em uma escola de samba de Florianópolis. Conforme se adentrou no lócus de pesquisa, por meio de análise documental, observações diretas e entrevistas, a questão da racionalidade emergiu como um tema proeminente para a atividade de tomada de decisão desta organização. Por meio de elementos da análise do discurso, evidenciou-se a presença predominante da racionalidade instrumental na alta administração, e de racionalidade substantiva nos níveis intermediários da tomada de decisão. Ao final, verificou-se que, paradoxalmente, no desfile de carnaval, a liderança da organização migra de uma estrutura institucional formal para a estrutura operacional.

Palavras-chave

Terceiro Setor. Escola de Samba. Tomada de decisão. Racionalidade instrumental. Racionalidade substantiva.

Racionalidades instrumental y sustantiva en los diferentes niveles de toma de decisión en una escuela de samba: un estudio de caso en União da Ilha da Magia

Resumen

Este estudio busca comprender la relación entre las racionalidades instrumental y sustantiva en los diferentes niveles de toma de decisión de una escuela de samba. Ese objetivo se ha efectivizado a partir de una investigación en una escuela de samba de Florianópolis. Conforme se adentró en el locus de la investigación, por medio de análisis documental, observaciones directas y entrevistas, la cuestión de la racionalidad emergió como un tema prominente para la actividad de toma de decisión de esta organización. A través de elementos de análisis de contenido, se ha presentado, en las prácticas discursivas de los responsables de la toma de decisión, la presencia predominante de la racionalidad instrumental en la alta gestión, y de racionalidad sustantiva en los niveles intermedios de la toma de decisión. Al final, se ha verificado que, paradójicamente, en el evento del desfile de carnaval, el liderazgo de la organización migra de una estructura reconocida como institucional formal a una estructura operacional.

Palavras-chave

Tercer Sector. Escuela de Samba. Toma de decisión. Racionalidad instrumental. Racionalidad sustantiva.



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