Strategizing in NPOs: A Case Study on the Practice of Organizational Change Between Social Mission and Economic Rationale

Urs Jäger · Timon Beyes

Abstract This article presents the main results of a longitudinal case study of a strategic change process in a cooperative bank. Pursuing both a "social" mission and an explicitly economic rationale, this particular nonprofit organization provides an exemplary research setting for inquiring into the delicate and contradictory interplay of mission focus and commercial imperatives. Departing from the practice perspective as a micro-view on everyday strategizing—an approach that seems to have not found its way into NPO-research yet—allows us to take an in-depth look at how people go about the process of making strategy despite the tensions between mission and profit. Our data yields three patterns of strategizing practices that aim at fostering economic growth without damaging the social mission, namely *supporting diverse positions*, *protecting stabilized relationships*, and *relating to organizational experiences*. Building upon our empirical results, we tentatively conceptualize "balancing practices" as potentially important acts of strategizing in NPOs.

Résumé Cet article présente les principaux résultats d'une étude de cas longitudinale sur le processus de changement stratégique d'une banque coopérative. En poursuivant tant une mission «sociale» que des raisons explicitement économiques, cette organisation à but non-lucratif particulière fournit un cadre de recherche exemplaire pour examiner les interactions délicates et contradictoires entre l'attention portée à la mission et les impératifs commerciaux. S'écartant de la pratique comme une vision partielle sur la fabrique de la stratégie au quotidien, la méthode qui semble ne pas avoir encore trouvé sa voie dans la recherche sur les organisations à but non-lucratif, permet un regard en profondeur sur la façon dont les personnes entreprennent des décisions en termes de stratégie, malgré les tensions existant entre la mission et les profits. Nos données ont produit trois caractéristiques des pratiques de stratégie dont le but est d'encourager la croissance économique

U. Jäger (✉) · T. Beyes
Center for Leadership and Values in Society, St. Gallen, Switzerland
e-mail: urs.jaeger@unisg.ch

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sans porter atteinte à la mission sociale, à savoir le *soutien à des prises de décision diverses*, la *protection des relations stabilisées* et le *partage d'expériences d'organisation*. Partant de résultats empiriques, nous modélisons approximativement les «pratiques d'équilibrage» en tant qu'actions potentiellement importantes pour les stratégies des organisations à but non-lucratif.

Zusammenfassung   Dieser Artikel legt die Hauptergebnisse einer Langzeitstudie über den Prozess des Strategiewechsels in einer Genossenschaftsbank dar. Eine "soziale" Mission und eine ausdrücklich ökonomische Rationale verfolgend ist diese Nonprofit-Organization ein ideales Feld, um das delikate und widersprüchliche Zusammenspiel von Missionsschwerpunkt und kommerziellen Geboten zu erforschen. Abweichend von der Praxis-Perspektive als Mikrosicht auf tagtägliche Strategieentwicklung—ein Ansatz, der noch nicht seinen Weg in die NPO-Forschung gefunden zu haben scheint—können wir einen tiefen Einblick nehmen, wie Leute trotz Spannungsverhältnis von Mission und Profit Strategien formen. Unsere Data zeigt drei Modellpraktiken von Strategieentwicklung, die auf ökonomisches Wachstum ohne Schädigung der sozialen Mission zielen, und zwar *verschiedene Positionen unterstützen*, *stabilisierte Beziehungen schützen* und *sich organisatorische Erfahrungen beziehen*. Aufbauend auf unseren empirischen Resultaten formen wir den vorläufigen Begriff "balancing practices" (ausgleichende Praktiken), potentiell wichtige Handlungen bei der Entwicklung von Strategien in NPOs.

Resumen   Este trabajo presenta los principales resultados del estudio de caso longitudinal realizado en el proceso de cambio estratégico de una cooperativa de crédito. Esta organización sin ánimo de lucro, que persigue tanto una misión social como un fin explícitamente económico, ofrece un entorno de investigación ejemplar para estudiar la delicada y contradictoria interacción entre el objetivo social y los imperativos comerciales. Partiendo de una perspectiva práctica y enfocándonos en las estrategias diarias (un enfoque que no parece haber encontrado su lugar en la investigación de las OSAL) nos adentramos para averiguar cómo abordan las personas el proceso de adopción de estrategias pese a la tensión entre la misión y los beneficios. Nuestros datos nos han proporcionado tres patrones de estrategias prácticas cuyo objetivo es fomentar el crecimiento económico sin dañar la misión social, es decir, *apoyar las distintas posiciones, proteger las relaciones estabilizadas y compartir las experiencias organizativas*. Basándonos en nuestros resultados empíricos, intentamos definir el concepto de "equilibrar las prácticas" como un acto potencialmente importante a la hora de elaborar estrategias en las OSAL.

Introduction

This article presents the main results of a longitudinal case study conducted in a nonprofit organization (NPO) called "Swissgroup" (a pseudonym). The cooperative

was founded 1899 by needy farmers and artisans who lived and worked in rural communities and started to support each other by subscribing to cooperative shares and establishing a shared deposit, enabling its members to raise money at favorable conditions. In the twentieth century, Swissgroup became one of the most successful banks in the Swiss market although (or because) the cooperative is still committed to its "social" mission of lending money to support local and often rural communities. However, from the 1990s on the top management has attempted to more explicitly shift the cooperative's strategic focus toward economic growth and an adjustment to perceived market pressures. Having pursued both a social mission and an explicitly economic rationale since its inception, Swissgroup therefore provides an exemplary research setting for inquiring into the interplay of mission focus and commercial imperatives. Through conducting a longitudinal case study, we were able to follow a particularly intense process aiming at strategic change that took place from 2003 to 2005. Attempting to answer our research question of how strategic change unfolds between social mission and economic rationale, we set out to inquire into the daily practices of strategizing, i.e., into the process of how the desire for strategic change is translated into organizational action—into strategy-as-practice.

Our endeavor therefore aspires to contribute to three important strands in the nonprofit literature. First, while the question whether cooperatives can be classified as NPOs is a matter of debate, there is a growing interest in qualitative empirical research on such organizations (Lohmann 2004): Marting and Miller (2003) look into the need for and the role of cooperatives and cooperative action in the war-torn countries Bosnia and Herzegovina; McKillop et al. (2003) examine gender imbalances in Irish financial cooperatives; Graeme and Les (2004) study how cooperatives support the development of social enterprises in France; Antonio (2004) investigates how social cooperatives have become instrumental in the expansion of the social economy in Italy, while Hoffmann (2006) explores how the loyalty of workers in cooperatives is higher than of those in business organizations.

Second, that Swissgroup and its processes of strategic change offer a particularly interesting case derives from the fact that such processes are becoming increasingly common as NPOs are challenged by a more competitive environment and/or resource shortages. Therefore, the evolution of nonprofits into more market-driven organizations has become one of the most pressing topics for nonprofit-research (Hammack and Young 1993) and is manifested in the current debate on commercialization. Cooney (2006), for instance, diagnoses a commercial trend in the nonprofit sector that results in more hybrid organizations combining social service and characteristics of business enterprise (see also Toepler 2006; Young and Salamon 2003). As a consequence, NPO researchers have turned to questions of more market-oriented management practices, the effects of exogenous shifts on organizational structure and the relationship between strategy and structure (for overviews, see Helmig et al. 2004; Stone et al. 1999).

Third, then, a growing body of texts on strategy in NPOs has emerged. As Middleton-Stone and Crittenden (1993) as well as Stone et al. (1999) observe, the existence of contradictory rationalities is one of the core challenges of strategic nonprofit management. Often, a nonprofit's social, cultural, or environmental

mission seems to sit uneasily with the growing relevance of economic concerns, leading to organizational tensions.[1] However, with regard to organizational strategy it has been argued that we still know relatively little about strategic management in nonprofits (Courtney 2002; Courtney et al. 2006). For example, there is a lack of studies that take an in-depth look at how strategic changes take place in the complex and contradictory conditions of NPOs (Helmig et al. 2004; Stone et al. 1999).

Thus, the aim of our article is to closely describe and analyze the processes of strategizing in a financial cooperative. For this, we follow the so-called practice perspective in strategic management research (Jarzabkowski and Spee 2009; Johnson et al. 2003; Whittington 1996). "Practice" describes a micro-view on organizational actions in their specific and situational context. To empirically investigate the practices of strategizing seems all the more important since many nonprofits are currently facing the imperative of economic reasoning. There is a need, therefore, to elaborate on the opportunities and limitations of strategizing in the context of potentially contradictory rationalities. In this sense and notwithstanding the obvious limits of a single case study, our article intends to illuminate strategic practices which support organizational development toward economic concerns precisely because they delicately balance between rationalities: they attempt to simultaneously foster change and stabilize "traditional" patterns of conduct. This text therefore also constitutes an attempt to enrich the growing interest in practice-oriented research with a thick description of how strategy-as-practice "works" in the circumstances of a cooperative.

We will unfold our argument in four steps: first, we briefly discuss the literature on strategic management in nonprofits and strategy-as-practice, outlining an understanding of strategizing that will guide our empirical analysis. Second, we detail the methods of data collection and data analysis underpinning our qualitative longitudinal case study. Third, we present our empirical findings by identifying three recurrent patterns of practices, namely *supporting diverse positions*, *protecting stabilized relationships*, and *relating to organizational experience*. The first strategizing pattern works toward strategic change precisely through respecting potentially contradictory rationales. The second balances the desire for change and organizational acceptance as it gradually pushes toward economization as long as there is no explicit resistance. The third relates strategically relevant issues to specific—and specifically "helpful"—organizational experiences. Discussing our findings, we tentatively suggest to conceptualize "balancing practices" as potentially important acts of strategizing in NPOs—a suggestion, it needs to be noted that is based on a single case study. Its theoretical and practical implications call for further inquiries.

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[1] Relatedly, studies of so-called multiple identity organizations have forcefully described how the enactment of different organizational identities and thus of incompatible concerns and expectations breed organizational conflict. Not surprisingly, perhaps, much of the empirical work underlying these texts has been conducted in nonprofit organizations (e.g., Pratt and Foreman 2000; Glynn 2000; Pratt and Rafaeli 1997; Golden-Biddle and Rao 1997; Gamm 1996; Gioia and Thomas 1996; Rodwin 1995).

Strategic NPO-Management and Strategizing

As Helmig et al. (2004) have pointed out in their review of the literature on NPO-management, the actual internal processes of NPOs have not yet received the attention they deserve. While contributions that depart from economic theory "have failed to explain the microeconomic internal functionings of NPOs" (ibid., p. 112), studies based on sociological theories usually deal with the organization's relations to its environment (see also Beyes and Jäger 2006). Furthermore, it has been argued that questions of organizational change (Parsons and Broadbridge 2004) as well as strategic management (van der Pijl and Simina 2004) are biased toward for-profit models and lack a more thorough engagement with the conflicting rationalities of NPOs (see also Salipante and Golden-Biddle 1995; Stone et al. 1999).

In the past two decades, a number of significant texts about strategic management in NPOs have been published (see only the book-length contributions of Bryson 1995; Kotler and Andreasen 1991; Oster 1995). Theory-guided approaches constitute the majority of texts and can be grouped into two types: first, instrumentalist approaches transfer strategic tools to the nonprofit context (Courtney 2002; Courtney, Marnoch and Williamson 2006; Middleton-Stone and Crittenden 1993; Saxon-Harrold 1990). Often, these instruments are introduced and their application described (Anthony and Young 2003; Baker 2007; Koteen 1997; Rogers et al. 2001). A second type of studies applies strategic concepts, not just instruments, to the nonprofit context, making use of, for instance, Porter's five-force model (Oster 1995) and life cycle theory (Bryson 1995; Graddy and Morgan 2006; see also Anheier 2005).

Such theory-guided approaches stick relatively close to the known strategy literature, therefore risking to pay insufficient attention to the everyday challenges of strategic nonprofit management. However, a number of contributions have taken a more detailed look at individual NPOs and highlighted possible limits to "conventional" strategic management (Courtney 2002; Koteen 1997; Hafsi and Thomas 2005; Stone et al. 1999; van der Pijl and Simina 2004). Moreover, some specific challenges of strategic *nonprofit* management have been made a topic, most notably a lack of control over external resources (Salipante and Golden-Biddle 1995), community-based strategic planning (Berman 1998; Graddy and Morgan 2006), mission-focussed strategic management (Drucker 1990), the importance of tradition and "the long-term frame of nonprofit organizations" (Salipante and Golden-Biddle 1995, p. 18) as well as conflicts about organizational goals and stakeholders as strategy initiators (Middleton-Stone and Crittenden 1993).

In the following, we add to this "context-sensitive" line of research on strategic management in NPOs by introducing a practice-based perspective. To our knowledge, this fruitful approach to gain an in-depth understanding of how strategizing works in the everyday life of organizations has yet to take hold in NPO-studies. To remedy this situation seems all the more important since contradictory rationalities are one of the core challenges of strategic management in nonprofits (Middleton-Stone and Crittenden 1993), most notably with regard to the tensions between mission and profit. Broadly speaking, the practice-based perspective focuses on how people go about the process of making strategy (Whittington 2003).

Following Hendry and Seidl (2003), we define acts of strategizing as episodes with a beginning and an ending in which organizational actors discuss topics expected to have a long-term influence. These episodes can be observed especially in workshops named as 'strategic' by the organization's members. The separation between workshop activity and the usual workaday life enables the participants to step out of their everyday routines to reflect strategic issues. While strategy workshops do not necessarily have productive outcomes (Mintzberg 1994; Hodgkinson and Wright 2002) we assume that they constitute meaningful events for strategic change (Hendry and Seidl 2003). We therefore focus on these episodes to study how practices of supporting strategic change unfold in light of Swissgroup's contradictory rationales of social mission and economic focus. Identifying strategizing practices within these workshops presupposes pattern recognition through taking a micro-view on episodes, comparing descriptions and outlining similarities and differences.

Research Method

For analyzing the complex phenomenon of strategizing practices in a cooperative we conducted an inductive single case study (Yin 1981; Eisenhardt 1989; Siggelkow 2007) based on ethnographic methods. The fieldwork was carried out in a NPO called Swissgroup over a period of 33 months. We followed several avenues of data collection: As participating observers, we conducted 52 observations, 13 of them in strategy workshops. All observations were recorded in field notes and typewritten into protocol format. 75 semi-structured interviews were conducted and fully transcribed. In addition, we collected data from formal and informal encounters such as meetings and conferences, lunches, dinners, and hallway discussions. 221 company reports and internal newspapers covering a century of the organization's history were analyzed, and archival sources such as external and internal publications, memos, and transparencies were systematically collected and studied to increase the contextual and content-related plausibility of our data. Finally, the researchers were allowed to "shadow" two managers for 4 days in their everyday work.

Attempting to observe phenomena such as organizational rationalities and strategizing practices, one has to cope with a deep embeddedness of relevant data. Acting as participating observers allowed us to come as close as possible to the phenomena under study (Hatch 2002). To gain further insights into the strategy workshops' perceptions and influence, we analyzed the stories that were told by participants and that accommodate the meaning of their experiences concerning the workshops and related topics. Through studying such narrations, researchers are able to re-construct empirical phenomena as they are experienced by the observed actors (Phillips 1995; Oliver 1998).

To find answers to our research question we had to analyze two analytically distinct phenomena: first, mainly drawing upon the narrations collected in the interviews we carried out a contextual analysis to identify organizational rationalities that are "spread" over time and space (for contextualism in organizational research

see Pettigrew 1990). Both inner and outer contexts were analyzed longitudinally and historically to plausibly identify patterns of rationalities (Pettigrew 1990). Accordingly, the first part of our empirical findings highlighted perceptions of external, socio-economic changes (what Pettigrew has called the vertical level of analysis) and brought to the foreground the dominant, sequentially interconnected patterns of dominant rationalities (horizontal level of analysis). Second, analyzing our observation protocols allowed us to study critical organizational events—events the organizational actors described as having a high impact on strategic change—and their repercussions (Flanagan 1954) to identify possible patterns of strategizing. Since social phenomena "have to be forcibly carved out of the undifferentiated flux of raw experience and conceptually fixed and labeled so that they can become the common currency for communicational exchanges", pattern recognition helps tracing the utterances in social practices that "aggregatively produce a particular version of social reality" (Chia 2000, p. 513). We then focused on the newly established strategy process and its workshops that were designed to affect the whole organization.

In conducting the analysis we followed a content analysis process (Neuendorf 2002) combined with in vivo coding (Strauss 1987). Working with a coding software on the interview transcripts and the memos of the observations, a total number of 3,570 in vivo codes emerged. To condense these codes with regard to our research question we grouped them into two fields. The first we called "contextual analysis" (consisting of 2,540 in vivo codes). Through further condensing these codes two organizational rationalities emerged that were observable in many different codes, in other words, which were "spread" over time and space. The second field (consisting of 1,030 in vivo codes, most of them grounded in the observation memos) assembled the data which entailed information about practices of strategizing. Within this group, we continued the coding process up to the exploration of three main patterns of strategizing. Furthermore, in eight workshops we presented our findings to key informants of Swissgroup to increase the plausibility and relevance of our findings.

In the following we will first map out the tension between the social mission and the economic rationale. Then we will focus on Swissgroup's main strategy workshop called "bank managers' and board directors' forum" and exemplarily illustrate the three strategizing practices that result from our analysis: supporting diverse positions, protecting stabilized relationships, and relating to organizational experience. This is followed by briefly looking at three other strategy initiatives we encountered, where the strategizing patterns can be seen to resurface.

Strategizing Between Economic Rationale and Social Mission

To study strategizing "for" economic growth in nonprofits, Swissgroup—a federation of financial cooperatives in Switzerland—provides an fruitful research setting. The organization has a long history: at the end of the nineteenth century agricultural production was pushed into a dramatic crisis. The difficult economic environment was a fertile ground for the birth of an idea: farmers and artisans in

rural communities subscribed to cooperative shares and paid into a shared deposit. In addition, they declared to be liable for the cooperative's outstanding debt without any restrictions. This unlimited liability enabled the cooperative to raise money at favorable conditions. The emerging cooperatives were deeply embedded in the social structures of their villages and personal relationships were key for their development—they were an effective means for assessing and monitoring credit risks and exerted social pressure when members failed to pay interests or outstanding loans.

The first financial cooperative which became part of Swissgroup's federative organization was founded in 1899. The number of banks grew rapidly and in 1902, 26 autonomous banks decided to found a cooperative center. Its mission was to support the foundation of more autonomous banks, to represent mutual interests toward external stakeholders, and to provide legal, consulting, and interbank clearing services. The cooperative center was therefore founded as a service subsidiary for autonomous banks whose mission was to foster the monetary self-support of rural communities. In 2003, the federation consisted of a cooperative center and 490 legally autonomous banks. Today, the cooperative center is still a "daughter" organization of 490 independent "mother banks".

Swissgroup's history and its cooperative structure are said to be two main reasons for its high credibility in the Swiss market. In recent years, while (or because) other major banks focused on the international capital market and a more fluent clientele, it gained new customers without additional marketing efforts. Swissgroup's balance sheet total rose from 1.80 million Swiss Francs in 1903 to 824.09 million SFr in 2001. From 2001 to 2003, Swissgroup recorded double-digit growth numbers and increased its balance sheet total to 1'021.40 million SFr. Today, its core businesses are mortgage products and savings products, whereas other services such as investing, insurance, payment, and trading have remained peripheral.

Despite its success, the cooperative center perceives major challenges in the market. For one, increasing levels of legal regulation and developments in information technology seem to force operations to be centralized, thereby undermining the statutory autonomy of the autonomous banks. But mainly, more capital-market-oriented competitors return into the retail businesses which they quit during the bubble years of the 1990s. The diagnosis of stronger competition is met by the call for an increasingly strong role of Swissgroup's cooperative center: "We now need (the cooperative center) which supports our banks strategically in their markets", a bank manager tells us. However, assuming strategic leadership is a sensitive issue since the cooperative's mission focus is built on autonomous banks with a social purpose for—and strong ties to—their communities. The organization cares for lasting and reliable relationships, and local responsibility is highly valued. This rationale does not only extend over events in the entire group, it has been "at work" since Swissgroup's foundation. The quote of a bank manager illustrates how banks worry to hurt local relationships if they withdraw from their villages or merge with neighboring banks for economic reasons: "Social integration is a cornerstone of cooperative thinking. And trust… it is important that people have confidence… I'm terrified that we produce a pile of broken glass when we withdraw from here. That we destroy what has been built up in a century."

Nevertheless, although Swissgroup strives to "fulfill" its mission and to protect local relationships, financial success is also constitutive. For instance, early statues demanded to pursue current principles of modern banking. Borrowers had to be cooperative members, deposit sufficient securities and commit themselves to pay back their debts. In the words of a bank manager: "To protect the attractiveness of the village… The village would suffer another loss if the bank closed. After groceries, schools, post offices and so on shut down… if our bottom line is zero, if we run losses, every administrative board accepts to close this branch. But as long as it supports itself we should leave it open."

However, a manager of the corporate center seems wary of potential conflicts: "Competitors take notice of Swissgroup. When we offer certain products they simply offer lower prices. Today, our key challenge is to sustain our margins… if I look at the numbers, then we are all on a bad track. Our performance becomes worse every year. And I have the suspicion—this is related to profits—as long as we make profits we can allow cooperative excesses, to be incredible decentralized and not to hurt each other extremely, because this causes costs."

In sum, external shifts are perceived to threaten Swissgroup's financial success. Moreover, from the perspective of the cooperative center the organization's profitability is compromised by its "traditional" conduct. Therefore, the emerging contradictions start to question Swissgroup's federative structure which is based on the decentralized autonomy of its banks. Consequently, tensions emerge from the interplay between economizing and social mission. In the following, we analyze the main meetings of the formal strategy process, called bank managers' and board directors' forum, exemplarily illustrating how practices of strategizing attempt to "bridge" the strategic aim of economic growth and the organization's social mission. Then, we show inasmuch as these practices are part of patterns of strategizing that we found to be at work in the cooperative's strategy process and its various initiatives.

Strategizing: Three Illustrations

Our data analysis yields three strategizing practices: *supporting diverse positions* (*SP1*), *protecting stabilized relationships* (*SP2*), and *relating to organizational experience* (*SP3*). Each of these practices is illustrated below by interpreting events at the bank managers' and board directors' forum.

Supporting Diverse Positions

The bank managers' and board directors' forum, as it is labeled, is a semiannual get-together which was established in 2000 to discuss strategic issues relevant for Swissgroup's strategic change twice a year. The CEO and selected delegates from the cooperative center meet 980 bank representatives. One of the central bank managers argues: "In the past, communication was one-sided. In a sense that the cooperative center did not make transparent why it started to curtail the banks' autonomy. That led to the perception that the cooperative center is a threat.

Whenever it wanted to interfere into the banks' autonomy… we said, let's establish a semiannual forum where current issues can be discussed… the banks have responded very well to this tool… today, we have a more open communication, in the sense that we explain where (our strategies) come from."

The bank managers' and board directors' forum was established as a response to increasing organizational disquiet when the cooperative center absorbed orders from the banking commission and advised the banks to implement them, this way undermining their statutory autonomy. In 2003, the forums not only served to provide the banks with information but also to collectively develop a strategic agenda for Swissgroup. The plenums were subdivided into six workshops which were moderated by members of the cooperative center. The agenda was based on the rationale of financial success, and it was structured around two questions: How can we make our processes and structures more efficient? How can we take better advantage of our customer base? After lively discussions, the workshop results were summarized and presented back to the plenum at the end of the day. The outcomes of all forums and workshops were consolidated into a final document, internally labeled "Base Strategy". This process of developing a common strategic agenda was painful from the perspective of the cooperative center's strategists. One of them said: "…we informed everybody, we discussed (the Base Strategy) with Swissgroup's board, then our management said, what's the board's opinion, we made management proposals over and over again. We had draft versions (of the Base Strategy) which we discussed with the banks, we got feedback from the banks, we revised it, we made new management proposals, revised it again, went to the administrative board. So many times. That drives me crazy."

A senior manager from the cooperative center endorses: "Although our banks have no formal decision making authority, you must involve them in all decisions which affect Swissgroup. If you don't you have no acceptance."

The "Base Strategy" was finally adopted by Swissgroup's administrative board. But many bank managers are not satisfied: "Browsing our Base Strategy, I sometimes have the impression, yes there is a lot in it, for me, there are many loopholes and open back-doors. Where one could easily say, yes, we could do this, and we should also do this."

Nevertheless, a colleague defends the process through the following observation: "For me, a strategy must be broad. That's how our Base Strategy has been formulated. It gives the broad guidelines how to move. You have to continuously develop your strategy within these guidelines… it opens up options for action… we cannot preclude certain things per se, a strategy would not allow this… (The Base Strategy) you see, this is actually a very harmless paper. It is a paper that describes what we want to do but it is not a paper that stimulates … but it is one in which each one finds himself a little bit."

The Base Strategy respects all concerns brought up. In particular, outcomes which favor distinct priorities are avoided. Consequently, "there are many loopholes and open back-doors". The closure of open back doors would entail to favor some expectations over others, which would potentially hurt relationships. It seems that only by avoiding the settling of priorities and without omitting voices, economic concerns can be raised. The strategizing practice of *supporting diverse*

positions helps to foster organizational relationships and to discuss economic concerns at the same time.

Protecting Stabilized Relationships

The cooperative center has launched a project called "Adjusting Payment Processes" without informing the individual banks. The intention of this project has been evident from the beginning: setting up an infrastructure to centrally process payment transactions and to reduce average costs. A senior project director of the cooperative center portrays the project's objectives: "Imagine, we have 500 persons processing our payments in decentralized units today. We could do it with 50."

Eight months later, in November 2004, 15 delegates from the cooperative center meet 60 out of 490 bank managers and their respective board directors. For geographical reasons, the remaining 430 banks attend eight identical forums held in other Swiss towns in November 2004. The forum starts with an informal gathering outside the seminar room. The mutual reception is affectionate. Lively discussions arise immediately. After warmly welcoming his colleagues, the CEO addresses a major concern and refers to one of the Base Strategy's pillars—how to make processes more efficient. In particular, he talks about revamping Swissgroup's payment transactions which have been locally processed for a century: "We need a new infrastructure for processing our payment transactions. We can even imagine to initiate its centralization. It could reduce our average costs. On the other hand, this affects jobs in your banks. We have to delve into this issue. We tend to assume that we can offer such a service. You can decide… From a cost perspective we cannot neglect our payment processes. On the other hand, you still have local people who could do it. This increases the sensitiveness of the issue, I know. We want to inform you. We have not decided yet, but there is a high chance…"

The CEO continues to describe another strategic initiative: He outlines the plans to improve human resources processes. He argues that the individual banks and the cooperative center would agree to mutually standardize employment contracts. Accordingly, the cooperative center would have launched a corresponding project in the spring of 2004. Its declared objectives are to reduce costs through central production of documentation, to bundle legal advice for minimizing legal risks, and to transfer key personnel within the organization. The CEO goes onto stress that since the transfer of key personnel touches a bank's discretion over human resources it is exceptionally provided for in a so called convention—it would remain the banks' discretion to decide whether they join the convention or not. He pauses for a moment and invites the plenum to ask general questions concerning Swissgroup's development. A bank manager takes courage and sternly wonders: "Didn't we agree that it remains a bank's voluntary decision to join the Human Resource convention? Now we start to feel pressures. If we do not join, your fellow employees in the HR department (of the corporate center) withhold necessary information. Are they just overeager?"

Hearing the bank manager's question the CEO immediately replies: "We have to control these nerds. We want to take a groupwide perspective in HR-development issues. In certain questions such as harmonized employment contracts… we said it's

a voluntary agreement. I won't accept that we start to selectively provide general information. I will take appropriate action and make sure that everything remains how it was. Thank you for your comment."

In the heat of this moment a senior HR-project manager of the cooperative center who attends the forum and who has listened to the CEO calling him "nerd" gets increasingly upset. He whispers to a colleague: "It's a leadership issue, I expect commitment and clear communication of decisions…." Then he recalls another recent event: "I was almost screwed last year because I believed my department head. He confirmed that the project was accepted. I asked 'really, are you sure?' 'Yes, it is' he replied. One week later somebody yelled down from top, 'what are you doing, are you completely insane?' I said 'you approved the project'. Then they said 'wait a minute, we accepted the project under reserve'. I replied, 'how can I know, I even don't get the minute of your meetings'. Looking back, there were no minutes of top management meetings until one year ago. We have minutes today, but they are treated as confidential as state secrets… secret minutes of top management meetings are beyond my comprehension. One of my project managers applied for a project, he has not received any reply on what has been decided."

The practice of *protecting stabilized relationships* supports the strategic goal of financial success while allowing to shelter organizational relationships or to repair them when hurt in public. The border between what is acceptable and what is unacceptable is constantly being negotiated. The cooperative center is "on its toes", so to speak: If a decision has been made, it is "tested" cautiously, and room for maneuvering and back-paddling is left. Often, decisions are at first simply noncommittal. Nevertheless, the practice of circling around the border of acceptance ensures a step-by-step process of "silent economizing", of slowly shaping the cooperative toward more streamlined processes.

Relating to Organizational Experience

After having responded to several other questions of bank managers and board directors the CEO proceeds. He continues with an issue which was already discussed in a previous forum: How to take advantage of customer potentials more effectively? According to the cooperative center, to prevail in today's competition customers need to be approached more strategically, and that entails customer segmentation practices. For this purpose, marketing experts in the cooperative center have started to develop IT heuristics which help to segment customers. The CEO's introduction is followed by a discussion about the segmentation strategy. One member of the cooperative center says: "You know the extended discussion about segmentation strategy. We from the corporate center believe that we might contact our customers more directly.(…) What do you think?"

A longer period of whispering between the bank managers ensues. Finally, one of them comments: "There is opposition against your segmentation strategy. That's not Swissgroup-like". Another adds: "The strategists from the cooperative center are talking in a different way. We do not understand them; if they act like that, they are not accepted."

The manager from the cooperative's center's marketing department steps into "save" the situation:"(…) As you know, we are working with customers who have a big deposit and customers with a small deposit. You must call the ones with the big amount of money several times a month, you must inform them and build the relation to them. The ones with the small deposit you can not reject—that's obvious. We just want to serve the customers with a big deposit more intensively. That's all."

One of the bank managers' answers: "Actually, this way of customer service, we do that today—it's all in our head. Your idea of—a silly word—'segmentation' is nothing new. We just did not name it."

With this, the strategic importance of customer "segmentation" seems to be generally accepted. At the end of the day the CEO asserts: "What we do here is what we have defined in the Base Strategy, actively serving customers and markets. The segmentation of customers does not shine through. Some of you got scared. All we do is to advise some customers more intensively than others. This is not an accusation that you haven't done anything so far. Local presence was enough when large competitors withdrew. Today, it is only a next step, because competition becomes increasingly intense. (…)"

The segmentation strategy, devised to boost the cooperative's handle on financially important customers, at first unsettles the local bank managers—Swissgroup was founded as a self-help organization and established on the principle that each customer is equally valuable. In order to somewhat "save" this particular strategic initiative (its protagonists would have liked to take it much further), it has to be related to the everyday experiences of the bank managers: It is nothing new; it is just a new language to describe and stress what is being done anyway.

Strategizing in Swissgroup's Strategic Initiatives

The strategizing practices identified in the events of the bank managers' and board directors' forum are no isolated coincidences. Rather, the analysis of our empirical data confirm their occurrences throughout the strategy process in different times and places. They constitute patterns of strategizing toward economic growth. Since a comparable reconstruction of other organizational events is beyond the scope of this article, we have summarized examples from three specific strategic initiatives carried out in the time of the longitudinal case study—product innovation, a merger of three cooperative banks, and a project for standardizing employment contracts—into the table below.

As Table 1 shows, the strategizing practices of *supporting diverse positions* (SP1), *protecting stabilized relationships* (SP2) and *relating to organizational experience* (SP3) reliably resurface in initiatives which aim at making both the overall organization and the individual banks more efficient and productive. However, we also observed a change process which partly deviated from the patterns of practices that underlay the other projects: the cooperative center's reorganization of the central marketing department and its effects. The newly hired marketing experts were told to develop a consistent brand appearance and implement new marketing tools to attract new customers. They then collaborated with external consultants without engaging in a broad organizational discussion process. Also, the top management of the

Table 1 The three strategizing practices in different organizational contexts

Organizational context	Strategizing practice 1: supporting diverse positions		Strategizing practice 2: protecting stabilized relationships		Strategizing practice 3: relating to organization. experience		Effect
	Event	Pract.	Event	Pract.	Event	Pract.	
Strategic initiative: product innovation (period of observation: 01.04–06.05)	The Top Management Team (TMT) of one cooperative bank decides to test a new product	The board asks employees to sell the new product but stresses that the decision to offer it would lie with each employee	Bank's TMT-meeting	TMT decides to leave the existing processes intact by suggesting the new product as an "add-on" and assigning it second priority	Bank's TMT-meeting	TMT presents an analysis of the employees' experiences with customer needs and relates the new product to the results	The new product is added to the product portfolio
Strategic initiative: merger of three cooperative banks (period of observation: 01.04–06.05)	The Top Management Teams (TMTs) of three cooperative banks decide to merge. They meet several times with delegates from the different banks	Delegates take great care that the minutes show how different positions have been discussed and taken into account	Merger project meeting	TMTs do not decide on issues which might negatively affect their cooperative members' expectations	Merger project meeting	Delegates rationalize the need to merge by relating to cooperative members' experiences with changing environments	The merger goes through
Strategic initiative: standardization of employment contracts (period of observation: 01.04–06.05)	The Human Resource-department launches a project to standardize employment contracts in all cooperative banks	Critics of the project are patiently listened to and not argued with. "Collaborative" managers are encouraged	Project meeting	Project team decides to start a pilot project in order to not intrude upon the critics' day-to-day business	Information meeting with bank managers	Bank managers listen to "pilot colleagues" praising their experiences with the new contracts	After the pilot phase, standardized employment contracts are introduced

cooperative center gave a clear commitment to the new brand without a prior "testing" of the acceptance of their action. However, statutorily this becomes less of a contradiction since the cooperative center is formally responsible for the marketing of Swissgroup. Furthermore, it should be noted that a new cooperative brand appearance has no direct impact on the internal processes of the autonomous banks and that the decision to adopt the new brand was left to the individual banks. As we found out, moreover, having been responsible for their own marketing and its difficulties has made many bank managers susceptible to the idea of centralized marketing activities and a standardized design. In this sense, communicating this strategic initiative quite effectively related to organizational experience, too.

Discussion

Building on the data of a longitudinal single case study, our findings reveal distinct practices which support the strategic directive of economizing. To summarize: the first pattern of strategizing (SP1) consists in integrating diverse positions even if it aims toward a single one that of economic growth. For instance, the bank managers' and board directors' forum is called into involve the local banks, and it does not serve to settle organizational priorities but to perform participation and conviviality. It is not a question of democratic decision making but of respecting diverse positions—which later find themselves in the broad and rather noncommittal strategy article. The finding of very broad strategies supports Bielefeld's (1994) observation that long-living nonprofits use multiple strategies, i.e., strategies with an emphasis on new revenue opportunities *and* legitimation strategies at the same time. The second pattern of strategizing (SP2), *protecting stabilized relations*, shelters or repairs organizational relationships even if, again, it tries to push toward economic change—but only insofar as it is organizationally accepted. On the one hand, the reasons for the necessity of economic initiatives to support financial success are constantly reiterated. On the other hand, when such initiatives start to "hurt" organizational relationships, they are quickly withdrawn or toned down. The third pattern of strategizing (SP3), *relating to organizational experience*, is made up of attempts to connect strategic initiatives to already common practices or beliefs, stressing their strategic relevance. It thus also and cautiously works toward strategic change.

Before we turn to our case study's main implications, it should be noted that they have to be taken with a grain of salt. Ours has been a modest endeavor: First, relying on an in-depth single case study imposes strong limitations on attempts to generalize our findings. Second, we are aware that the example of a cooperative bank and its comparably clear-cut economic focus—that has always been interrelated with its "social" mission—presents a special case within the nonprofit context. However, it is precisely the equal weight of economic rationale and mission focus that makes Swissgroup a very interesting research object. We would hazard the hypothesis that formerly less business-oriented NPOs now grappling with the imperative of economizing (have to) develop practices of strategizing that resemble the balancing acts of our cooperative's management. It follows that, third, the transfer of this hypothesis depends on the existence of such dual (or multiple) rationalities in other

organizations. Fourth, we acknowledge that limiting observations to a 3-year period may lead to conclusions which apply less well to later stages of Swissgroup's development.

Notwithstanding these caveats, a number of implications offer themselves up: first, a tentative and possibly counter-intuitive "model" of strategic action emerges from our data. Whereas common strategy concepts depart from the assumption that making strategy is about unambiguous decision-making transferred into a precise idea of how to (re)direct organizational conduct (see only the impressive amount of literature on strategic planning), our research shows how supporting diverse and sometimes contradictory expectations, protecting stabilized relationships and thus accepting organizational resistance as well as coupling internal, historically grown experiences with external strategic trends constitute everyday strategizing practices that "work" in NPOs (for the importance of tradition, see also Salipante and Golden-Biddle 1995). With regard to the challenges of economizing in mission-focussed organizations, it seems that rationality shifts can only be managed indirectly, not by formulating goals and turning strategies into action, but by balancing organizational dynamics. This finding can be related to Nutt's observation (1993) of how nonprofit managers often favor a comparably low involvement in strategic change processes.

Second, our results confirm the doubts about how smoothly strategic management approaches can be transferred from the for-profit to the nonprofit world. We still know relatively little about strategic management in nonprofits, indeed. If contradictory rationalities constitute one of the core challenges of strategic management in nonprofits, then existing strategic concepts and tools have to be assessed inasmuch as they are able to do justice to the organizational hybrids that are nonprofits. Third, this argument extends to the study of NPOs themselves. In order to gain further insights about the workings of organizational strategies, more thick descriptions of NPO strategizing are required. Fourth, to our knowledge attempts to enlist a strategy-as-practice perspective have yet to take hold in NPO research (Jarzabkowski and Spee 2009). We hope that we were able to demonstrate how paying attention to the mundane world of strategizing is a promising avenue of further empirical research. We would thus like to see more studies that, with regard to their inception, are less distracted by overarching theoretical frameworks or models, so to speak.

Nevertheless, underlying the strategy-as-practice approach there is a more complex theoretical issue that we have opted to forgo in favor of more detailed empirical discussions. We can only broadly sketch these conceptual stakes as the fifth and final implication: in a nutshell, inquiries into strategizing assume change to be the normal condition and stability the exception—hence the verb form of "strategizing" (Chia 1996, 2004; Tsoukas and Chia 2002). The stabilization of experiences is an act of arresting and simplifying the irreducibly dynamic and complex flux of reality (Chia 1996). In other words, *stability paradoxically depends on dynamics*. In this sense, organizational rationalities—like an NPO's mission focus and its economic logic—are continuously stabilized through practices which try to arrest the flux of reality. They affect and are reproduced by an array of organizational events, and over a longer period of time. Furthermore, while such rationality may appear sticky in a single event it may shift over a longer period of time. Now, in the

case of Swissgroup the strategizing practices perform delicate balancing acts in that they both stabilize the mission focus and the work toward economizing, this way slowly and gradually reconfiguring organizational conduct. Moreover and relatedly, when assuming that organizational rationalities are expressed through a multitude of events all over the organization they might be influenced but they cannot be managed in the sense of managing a resource: a single (pattern of) practice has only limited impact, and an organizational rationale can only be influenced in the long run. Therefore, the study of strategizing practices paints a different picture of the labor of "willed" strategic change than conventional images of purposeful strategic management with their emphasis on managerial "throughput". We thus believe that future theory building has to be able to accommodate a paradox: stability depends on dynamics. In the complex flux of reality, Swissgroup's practices of strategizing simultaneously cared for and thus reproduced its mission focus, too.

Conclusion

This study is an attempt to describe and analyze practices of strategizing in a cooperative bank. For this purpose, we provided exemplary descriptions of different strategy workshops in which such practices unfold. Through analyzing the empirical data of a longitudinal case study, we identified three patterns of strategizing: *supporting diverse positions*, *protecting stabilized relationships*, and *relating to organizational experience*. Geared toward pushing the organization toward economic growth, these practices connect to, protect or foster the cooperative's social mission at the same time. What we end up with, then, is an image of nonprofit strategizing that seeks to strengthen the organization's economic rationale while simultaneously nursing its mission focus. Although this might come across as a rather obvious statement, we hope that we have shown how complex and "tricky" such balancing acts between economizing and supporting local communities turn out to be. Since our findings cannot be more than a first, explorative step into the mundane complexity of NPO strategizing, we conclude by advocating further in-depth empirical work to shed light on the change practices in nonprofits. Although the need to adapt to changing environments—read: economization—has become an inescapable reality for many NPOs, scholarly research lacks an adequate empirical basis for deriving more insightful information for both conceptual work and practical struggles. Furthermore, assuming that dual or multiple organizational rationalities are inherently dynamic brings with it a conceptual vocabulary that might be better equipped to theoretically interpret the processual nature of organizational conduct and strategic change.

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