

Sensemaking, meaning-making and practice perspectives in strategic planning for a veteran
service nonprofit organization

by

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B.S., University of Mary Washington, 1997
M.S., Old Dominion University, 1999

AN ABSTRACT OF A DISSERTATION

submitted in partial fulfillment of the requirements for the degree

DOCTOR OF PHILOSOPHY

Leadership Communication

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Manhattan, Kansas

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Abstract

The purpose of this research is both practical and scholarly. From a practical perspective, this study's purpose is to explore the successes and challenges of a veteran service nonprofit organization through an *Appreciative Inquiry (AI)* process to inform the organization's future priorities and direction. From a scholarly perspective, this research extends organizational literature in that it brings to light the ways members of an organization negotiate roles and navigate tensions in the construction of strategy and the function of the strategic text in inspiring commitment and motivating change. Using a constructivist grounded theory approach, this research builds on the principles and concepts of sensemaking and meaning-making in a community of practice and strategy-as-practice. Data collected from in-depth qualitative fieldwork included interviews, a focus group, an open forum, a facilitated virtual board retreat, observations, correspondence, and archival materials. Data were analyzed using two coding techniques, one for the drafting of the strategic plan and the other an inductive approach to explore the research questions. The preliminary findings reveal three tensions (1) tensions in the transition from top-down to more inclusive strategic planning; (2) tensions between conflict and mutual engagement; and (3) tensions in the relationship between practitioners and strategic objects in creating meaning. Ultimately, this research provides perspectives on the broader implications for engaging leadership communication processes, such as appreciative inquiry, in facilitating organizational change.

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Approved by:

Major Professor
Brandon W. Kliever

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I have the honor of being a part of the first cohort of K-State's Leadership Communication doctoral program. My fellow classmates are some of the most remarkable and intelligent change agents and I am grateful to have met them. Through their engaging classroom discussions, emails, text messages, happy hours, and dinners, these individuals have become more than classmates, they are life-long friends.

My friends and family have been an unfailing support since the moment I shared my interest in continuing my education. I am especially thankful for my husband, Monte. At times, pursuing a PhD feels like a very selfish endeavor, one that disrupts schedules and pulls time away from family and relationships. Monte was always encouraging and never made me question the decision to go back to school. The timing of this academic pursuit meant that I shared being a K-State Wildcat at the same time as my niece, Kyrsten. Long walks and backyard, socially distanced COVID visits to talk about our classes and assignments - I love that I had this time to share in our learning experience together.

My sincere appreciation is extended to my dissertation committee. The words, "the best dissertation is a done dissertation" and a strong commitment to community-engaged scholarship drew me to my dissertation chair, Dr. Brandon Kliever. I am grateful for his guidance throughout my research, coursework and dissertation drafting process. With his mentorship, I

feel this dissertation is even better than just “done” and I am proud of the ways I have been able to make a positive impact with my community, the SAVE organization. Always a coach, Dr. Gregg Hadley found ways to train and prepare me for each step of this doctoral challenge. Dr. Colene Lind pushed me to be a better scholar, ensuring that I fully considered the potential my work could contribute to both a practical and scholarly audience. Dr. Katie Burke and I have shared the past 15 years of a professional and academic journey. As a committee member, she also contributed as a partner in my work with SAVE, extending the community into the classroom for undergraduate communication students.

Dedication

To my father who instilled in me a love of country and appreciation for life-long learning.

Chapter 1 - Introduction

The purpose of this research is both practical and scholarly. From a practical perspective, this study's purpose is to explore the successes and challenges of a veteran service nonprofit organization through an *Appreciative Inquiry (AI)* process to inform the organization's future priorities and direction. From a scholarly perspective, this research extends organizational literature in that it brings to light the ways members of an organization negotiate roles and navigate tensions in the construction of strategy and the function of the strategic text in inspiring commitment and motivating change. This chapter introduces the rationale for the study, as well as the research purpose and questions. An overview of the research framework is also described. This first chapter highlights the researcher's commitment to community-engaged scholarship organized by the three areas of focus in the Leadership Communication program – engaging community, advancing communication, and leading change. This chapter concludes with a discussion of the researcher's subjectivities, as well as the limitations and significance of the study.

Rationale for the Study

Founded in 2015, the Servicemember Agricultural Vocation Education (SAVE) organization's mission is to empower military servicemembers and veterans seeking a new purpose and transition back into civilian life through hands-on training in careers in agriculture and agribusiness. In 2020, SAVE sought the assistance of Kansas State University to develop a strategic plan for their next five years. What followed was a meaningful collaboration with practical utility and implications for SAVE (the development of a strategic plan), but also the opportunity to explore how participants, many of whom are retired high-ranking military veterans, engage in a strategic planning process designed to be inclusive and transparent. Data

collected from in-depth qualitative fieldwork including interviews, a focus group, an open forum, archived material, and a facilitated virtual board retreat following an AI approach focused on the strengths and desired future of the organization.

From a practical perspective, this engaged research provides the opportunity to explore the successes and challenges of the SAVE organization through an AI process to inform the organization's future priorities and direction. An AI approach was selected as a means to engage practitioners as they explore their roles, their sense and meaning-making process, and potential tensions in a positive way. Asking participants in a challenging context to reflect on and assess their organization and practice can be a difficult and intimidating process. AI was selected as an opportunity to focus on SAVE's strengths while helping to make sense of potential tensions that might arise.

The process for developing SAVE's strategic plan was designed to be inclusive, transparent, and well-informed. With an organization and board heavily comprised of military veterans, a process that invited all levels of the organization and even external stakeholders to become strategic practitioners was both foreign and challenging. At its core, participatory processes are designed to address issues of power, aim to make voices heard, and grant agency to all participants (Bratteteig & Wagner, 2012). In this process, all participants were invited and encouraged to become strategy actors, making and shaping the construction of strategy for the organization.

From a conceptual and theoretical standpoint, this research seeks to contribute to a growing body of practice-based organizational studies. A significant amount of research and literature is devoted to strategic planning and organizational management, but only within the past decade has more attention turned to practice-based analysis of organizations. Within the

practice-based literature, very few studies include military or veteran organizations in their analysis (Westling et al, 2016). Practice-based organizational research looks at the ways in which people adopt specific roles, tools, or discourses when engaging in activities (Rouleau, 2013). The practice tradition evaluates three interrelated concepts: practitioners, practices, and praxis (Suddaby et al., 2013; Whittington, 2006). Focusing on activities and the people who take on practices in strategic management has gained the label, strategy-as-practice. A practice perspective to the study of strategizing that focuses on the process of strategy making is useful for navigating multiple perspectives, understanding outcomes, and accounting for issues of power (Brown & Thompson, 2013). Using an inductive approach, this study seeks to understand the sensemaking and meaning-making activities of various strategic actors in a nonprofit veteran service organization as they negotiate their roles in the construction of strategy and engage with the strategic text. While practice research typically focuses on one aspect of strategic or organizational management, this research looks at the interplay between practitioners, practices, praxis, and a fourth element, the strategic text.

Following five months of data collection, the SAVE board adopted their strategic plan in July 2020, marking a successful practical outcome of this engagement for the organization. This research highlights the tenants of community-engaged research as defined by the Carnegie Community Engagement Classification in that it was reciprocal, provided mutual benefit, and reflected an exchange of knowledge and resources (Campus Compact, 2020). As a researcher, assisting SAVE with the development of their strategic plan surfaced interesting research questions related to how the organization, comprised of individuals more accustomed to command-and-control methods of strategic planning, responded to an inclusive and participatory process. Answers to these research questions contribute knowledge to practice-based

organizational studies and leads to a better understanding of how leadership communication processes, such as the participatory AI process designed for this strategic planning activity, can facilitate organizational change for other veteran service organizations. Not only does this research address a gap in application of practice-based studies to military or veteran service organizations, but answers to the research questions also complement existing organizational literature.

Understanding military strategic planning

Engaging with the SAVE organization in the development of their strategic plan revealed tensions and characteristics perhaps unique to veteran service organizations, namely the stark divergence between inclusive planning and hierarchical planning endemic of the military. Because this shift is central to the rationale of this research, significant attention to the nature of what makes military strategic planning different from other types of organization decision-making is provided in Chapters 2 and 3. Chapter 2 includes a brief literature review related to nonprofit and military strategic planning for perspective in understanding the sensemaking and meaning-making process observed during SAVE's strategic planning process. The intent of providing the literature review is to help distinguish the strategic planning process typical of military organizations compared to other organizations and will provide context to the tensions observed in moving from a top-down, command-and-control to more inclusive and participatory strategic planning process. As described more fully in the literature review, military strategic planning has a long history built on a centralized process led by senior leadership. In contrast, formalized strategic planning is relatively new for nonprofit organizations and most successful planning processes can be credited with their inclusive and participatory process. With more than 40,000 nonprofit organizations focused on servicemembers, veterans, and military families,

understanding the contrasting strategic planning approaches and designing processes that help navigate that transition will be useful for other veteran service organizations (Pederson et al., 2015).

This research demonstrates that engaging with an organization heavily comprised of military veterans and applying AI to promote strategic change requires a fundamental understanding of the cultural foundations of a military setting. Adapting the AI-based protocols can demonstrate a respect for and build upon those cultural foundations, while introducing new ways to collectively build the organization's future. For this reason, when describing the role of AI as a methodological framework in Chapter 3, a section is devoted to explain the challenges and opportunities of applying AI as a strategic planning tool in a military setting.

While the unique nature of military strategic planning will be described in Chapters 2 and 3, a summary description of the nature of the shift from a top-down military decision-making to inclusive nonprofit strategic planning is briefly provided as an introduction in this chapter. The purpose, process, and even the language, of military strategic planning differs from the type of planning that may occur within companies and organizations. Military strategic planning is a highly centralized activity conducted by and for senior leadership with an intended outcome to improve national security and to "build an efficient, functional and subordinate army" (Chairman of the Joint Chiefs of Staff, 2016; Westling et al. 2016, p. 9). Military strategic planning is rooted in a command-and-control philosophy where top-down control systems direct performance as means for achieving overarching goals (McEwan, 2016). Similar to military strategic planning, nonprofit organizations also face different strategic planning considerations and constraints than the corporate private sector. However, the approach to nonprofit strategic planning differs from the top-down approach endemic of the military in that nonprofit strategic planning often requires

collective input from a variety of volunteers, employees, donors, and stakeholders (Bryson et al., 2009, Reid et al., 2014).

In this research, AI was employed as a collaborative decision-making tool, an approach that has been applied to many industries, but infrequently used as a strategic planning tool in a military setting (Heflin et al., 2016). The AI approach was effective for the purpose of developing SAVE's strategic plan, but also provided a process to which participants, many of whom were retired military veterans, were not accustomed. Understanding the response of participants to this inclusive and strengths-based approach provides an opportunity to expand the work of organization development and speaks to ways to assist veteran service organizations in the shift from command-and-control to more co-created and collaborative processes.

Applying an AI approach in this research represents the type of mindset shift described by Bushe and Marshak (2015) as transitioning from a *diagnostic organization development* mindset to one that is *dialogic*. In diagnostic organization development, data collections informs linear problem-solving methods leading to change (Bushe & Marshak, 2015). Assessing the problem and directing the process is leader-centric (Bratt, 2020). Similar to military strategic planning, diagnostic organization development seeks to identify or "diagnose" a problem and then detect the actions necessary to change behavior to address the problem (Bushe & Marshak, 2015; Marshak, 2020). In contrast, dialogic organization development is influenced by interpretive and social constructionism approaches, where change is created through dialogue and negotiation to generate new ideas, and the outcome is focused on changing mindsets and what people think (Bushe & Marshak, 2015). Assessment is a process of self-discovery and all participants have the agency to co-create the process (Bratt, 2020). AI is an example of a dialogic organization development model. As described by Bushe and Marshak (2015), AI and its four

“D” phases (Discovery, Dream, Design, and Destiny) can be cast as a diagnostic process; however, AI processes that employ the dialogic mindset are more likely to result in transformational change. The ability to cross over the diagnostic and dialogic organization development mindset make AI a fitting approach for navigating the transition in military strategic planning to a more inclusive and participatory approach.

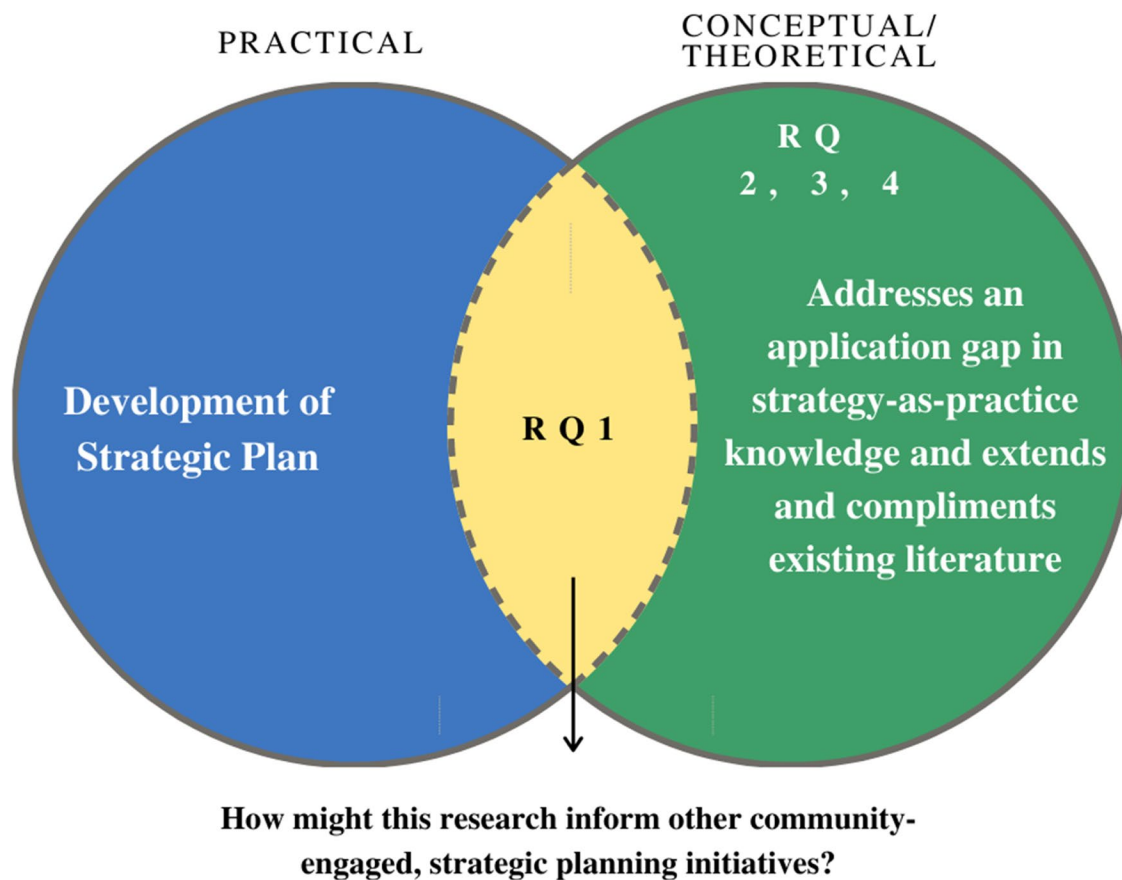
Research Purpose and Questions

The purpose of this study is to explore the successes and challenges of the SAVE organization through an AI process to inform the organization's future priorities and direction. Exploring the following research questions will help advance understanding and the limited literature related to practice-based organization studies for military and veteran service organizations.

Four research questions guide this study and reflect a commitment to community-engaged scholarship, highlight the practical implications of this study, and address a gap in organization management literature, specifically for veteran-affiliated nonprofits. Figure 1.1 illustrates how the research questions and strategic plan align with the practical, as well as conceptual and theoretical implications of this research.

Figure 1.1.

Practical and Conceptual/Theoretical Implications of Research Questions



RQ1 - What are the possibilities for engaging leadership communication processes such as appreciative inquiry (AI) in facilitating organization change?

K-State's Leadership Communication doctoral program is interdisciplinary and grounded in community-engaged scholarship, two features that informed my decision to pursue this degree. For this reason, this dissertation will include the strategic plan in the form of a practice or application paper (Chapter 4 and Appendix D) and will address a research question focused on the practical implications of this research (RQ1).

This study was made possible because of a unique partnership with the SAVE organization. Because of this partnership, this study illustrates the key components of community-engaged scholarship in that it is reciprocal, provided mutual benefit, and reflected an exchange of knowledge and resources. As a researcher, what sets this study apart from other facilitated processes or strategic planning activities is the findings contribute to scholarly knowledge creation. The knowledge building aspects of the study are explored through the remaining three research questions.

Three research questions relate to the conceptual and theoretical implications of this research. Two research questions (RQ2 and RQ3) seek to address an application gap in practice-based organization studies while extending and complimenting existing literature.

RQ2 - How do participants negotiate their role in the construction of the strategy for the organization?

Practice-based organizational literature is limited in application to military or veteran service organizations. However, the principles of practice-based organization research, understanding how people adopt specific roles, tools, or discourses when engaging in strategic activities, are quite relevant to military veterans service organizations such as SAVE. While the approach to strategic planning may be unique to veteran service organizations, to some extent all organizing and planning activities are challenged by hierarchy, power, and the desire to control outcomes. Accordingly, answers to these practice-based questions will not only address a gap in application to military or veteran service organizations, but they will also complement existing organization literature. Practice-based research also typically focuses on one or more terms or concepts central to the practice tradition – praxis, practices, and practitioners. The interplay of these terms serve as the backbone to RQ2 and will complement existing practice-based literature.

RQ3 - How does the strategic text inspire commitment to the organization and motivate change?

The development of the strategic plan presented an opportunity to observe how participants used a fourth element often underrepresented in practice literature, the strategic text. Understanding the role of the strategic text in inspiring commitment to the organization, motivating change, or legitimizing prior decisions presents an opportunity to extend strategy-as-practice research.

RQ4 - What tensions emerge as participants engage in the participatory process to develop the organization's strategic plan?

As a member of the SAVE board, I was uniquely aware of the organization's history and challenges when entering into this strategic planning process. For this reason, I designed the facilitation and planning process around an AI framework. With a focus on the positive, some might view AI as "Pollyanna-ish" or naïve. I consider the framework as an opportunity to explore the strengths of an organization, co-create an ideal future, and understand tensions as moments of possibility. During the data collection process, several tensions emerged that I iteratively built into the final stages of the strategic planning process. The final research question provides the opportunity to describe these tensions and build on literature that understands tensions as moments where organization practices are unstable and therefore open to change.

Overview of Research Framework

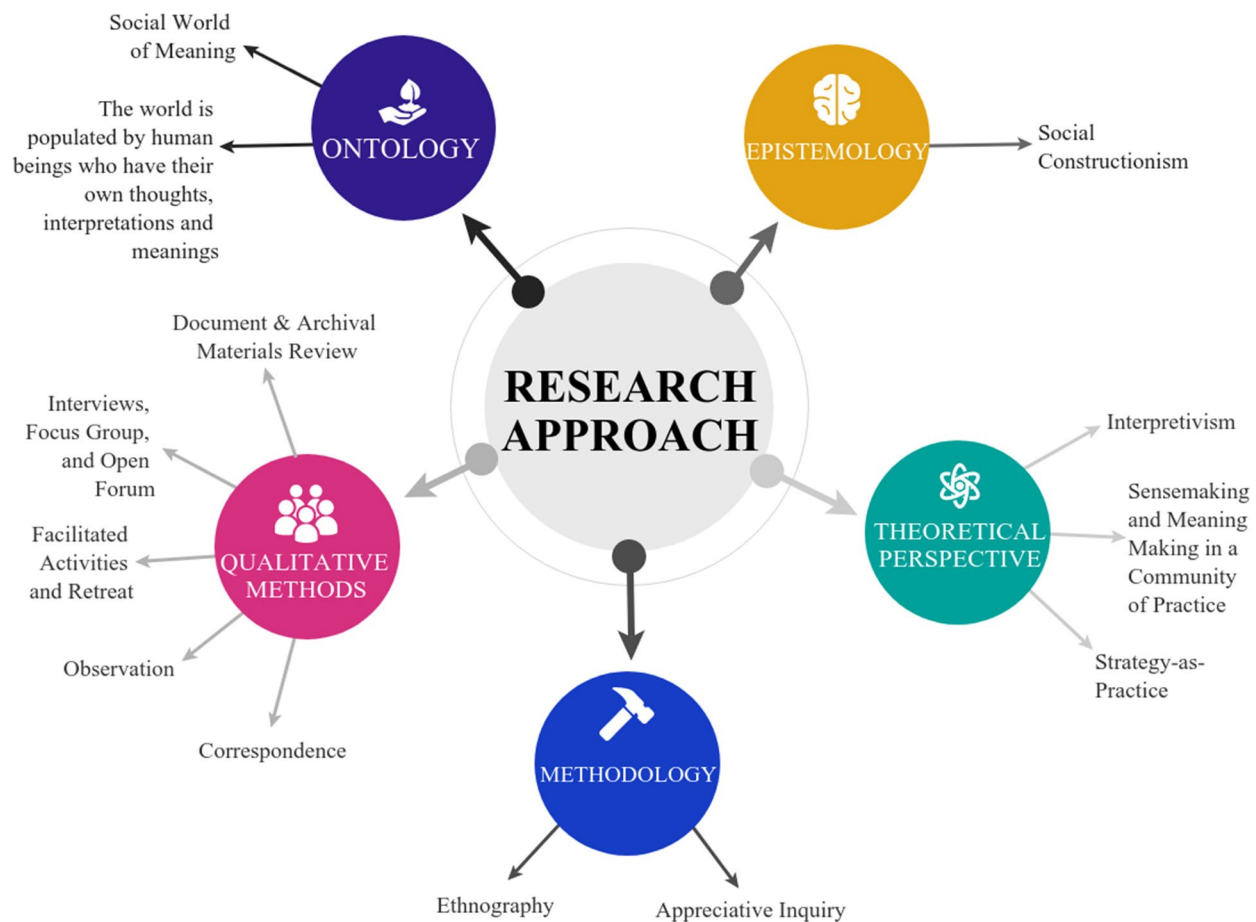
The approach to this research builds on an ontological, epistemological, and theoretical framework that informs the choice of methodology and data collection methods. The foundation of this research is built on the ontological assumption that the world is comprised of human beings, each of whom have their own unique thoughts, interpretations, and meanings of the

world around them. Understanding ontology as the “nature of being” (Bhattacharya, 2017, p. 6), this study recognizes that nature to include a social world of meaning. Social constructionism best describes the epistemological framework for this research. Social constructionism is the theory of knowledge centered on the notion that meaning and reality is generated in coordination with others (Fairhurst & Connaughton, 2014). Through this lens, knowledge and reality are created only through social agreement (Berger, 1996). From an organization standpoint, the identity of the organization is created through the interactions and reactions of individuals and stakeholders engaged with that organization, as well as expectations from society (Chaput et al., 2011). In the context of strategic planning, strategic actors shape and are shaped by their communication with others, interactions are seen as key in the process of developing the strategic plan, and strategic change occurs when everyday conversations are altered (Bushe & Mrshak, 2015; Fairhurst & Connaughton, 2014).

Three complimentary theoretical perspectives inform this research— interpretivism, sensemaking and meaning-making in a community of practice, and strategy-as-practice. Principles from ethnography and AI were blended to serve as the methodological framework for this research. A qualitative approach informed my data collection, which included interviews, a focus group, an open forum, observations, correspondence, review of archival materials, and facilitated interactions with the board, including the virtual retreat. Each of the data sources were selected to create opportunities for observing and engaging with participants through participatory and collaborative activities.

Figure 1.2.

Research Approach



Commitment to Community-Engaged Scholarship

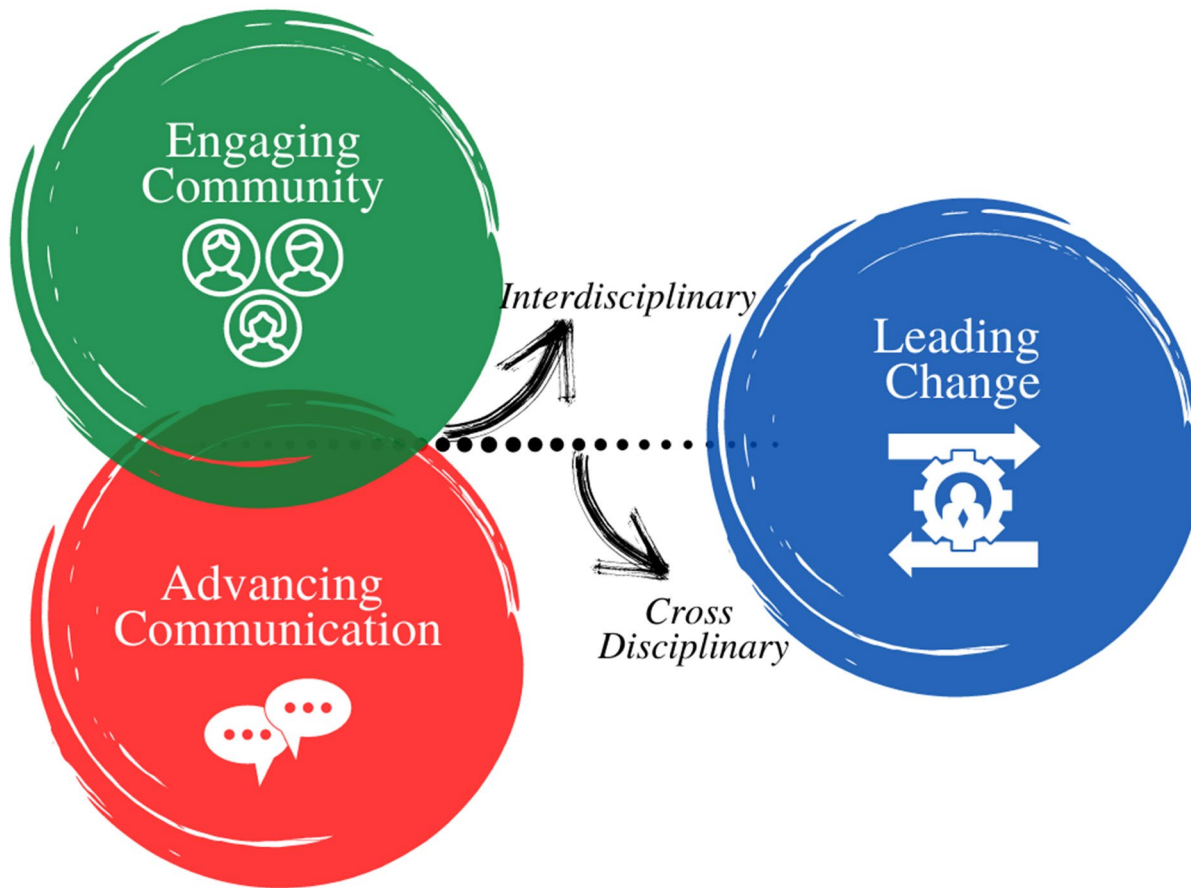
Following is a description of my commitment and conceptual understanding of community-engaged scholarship. My concept of engaged scholarship echoes the description provided by Barge (2016), in that it involves meaningful collaborations between researchers and communities in the co-creation of knowledge to advance change and address issues impacting the public good. In this way, engaged scholarship is “fundamentally concerned with making a difference” and uses “scholarship as a resource for improving lives” (Schockley-Zalabak et al., 2017, p. 810).

Reciprocity is at the heart of community-engaged research. Partnering with community in the co-generation of knowledge is a collaborative process “underpinned by the ethos to give back what the researcher takes out” (Blackshaw, 2010, p. 52). From an academic perspective, this research provided the opportunity to practice the principles of AI, apply the theories and knowledge gained through coursework, and contribute to my doctoral dissertation. From a personal perspective, the study allowed me to support what I consider a meaningful and important organization. SAVE’s benefit from participating in this research was practical, the development of a strategic plan. Such practical utility and implications of research is an important benefit to community-engaged scholarship (Ellingson, 2009). As described by Barge et al. (2008), “the value of doing research or engaged scholarship with academic partners is that it offers some practice value to the organization – it makes work better; it addresses a key problem; or it generates new possibilities for action” (p. 247). While the SAVE organization received the deliverable outcome of a strategic plan, I hope they also found benefit in participating in a co-generative process of discovering their strengths and imagining their ideal future. Participants also had the opportunity to play an active role in the construction of SAVE’s strategic plan and gain a stronger commitment to the organization.

Engaged public scholarship and research seeks to achieve outcomes from the three areas of focus in the Leadership Communication program – engaging community, advancing communication, and leading change. Following is a description of my understanding and knowledge of those three areas and explanation of how I view those three areas interacting from an interdisciplinary and cross-disciplinary perspective in my research (Figure 1.3).

Figure 1.3.

Disciplinary Perspective of Leadership Communication Focus Areas



Engaging community

Lewis (2012) recommends the starting point for an engaged approach is convening a learning community to share ideas, resources, and perspectives. Facilitating the virtual retreat, as well as, conducting interviews and the other research-related touch points provided the opportunity to serve the role of a convener of such a learning community. Initially, members of the community, or participants, were identified through conversations with SAVE organization and board leadership. Through a snowball process, additional participants were invited to participate with the goal of ensuring a diversity of voices and perspectives were engaged and

included in the strategic planning process. The community was expanded further through routine coordination with 502, a strategic marketing company. With information gained through this process, 502 is designing a strategic marketing and outreach plan for SAVE. K-State's Office of Educational Innovation and Evaluation (OEIE) was invited to collaborate in an open forum with stakeholders and partners, as well as during a board facilitation activity. As a contracted third-party evaluator for SAVE's federal cost-share grants, K-State's OEIE was able to gain access and information through this collaboration that assisted in their evaluation. An opportunity to share this research with students in the K-State Agricultural Communications capstone course broadened the learning community even further.

Engaged scholarship strives for inclusive participation and requires engaging others and working across multiple factions (Carcasson & Sprain, 2016; Chrislip & O'Malley, 2013; Connaughton et al., 2017; Warren et al., 2018). During a kick-off meeting in January 2020 with SAVE, I offered to facilitate an inclusive, transparent, and well-informed process to gather input and feedback for the development of a five-year strategic plan for the organization. The word inclusive led my approach to engaging community in this research. Throughout the data collection process and built into the design of the retreat was an intentional focus on involving diverse voices and perspectives. This approach to community engagement also included routine collaboration with the SAVE board – discussing the data collection design, sharing initial results, and inviting their feedback. This type of ethnographic data collection across a substantial period of time is what Hartwig (2014) describes as Ethnographic Facilitation, and allows for a “deep, nuanced understanding of the site, especially members’ cultural practices and communicative behavior” (p. 61). In keeping with the inclusive facilitation approach, prior to finalizing a

strategic plan for SAVE, I shared a draft with all participants as an additional opportunity to hear their reactions and input.

My approach to advancing community in the context of this research also seeks to gain an understanding of SAVE and the participants by what is known as a *community of practice* (Wenger, 1998). More than a group or collective, I am keenly interested in exploring how the shared activities of the participants create shared knowledge and shared ways of knowing. As described by Drath and Palus (1994), in a community of practice, “people are united by more than membership in a group or category, they are involved with one another in action” (p. 11). Protocols for the focus group, open forum, and the virtual retreat were designed to gain an understanding of the SAVE organization, not as a group of aggregate members, but as negotiated and sustained relationships organized around doing things together to advance SAVE’s mission and purpose. A focus on the practices of community, rather than the nature of the community may provide a better understanding of the organization’s strategizing process. In alignment with a strategy-as-practice perspective, this approach to engaging community assigns a “greater focus on the practitioners and the activities in which they are engaged as a basis for understanding the dynamics of strategizing” (Macpherson & Antonacopoulou, 2013, p. 265).

Engaged scholarship can have a leveling effect on the relationships between researchers and what might otherwise be called participants (Cheney, 2008; Ellingson, 2009) and signals a willingness to “be in the world rather than about the world” (Deetz, 2008, p. 290). My engagement with community through this research demonstrated such a commitment. As member of the SAVE board, I am an insider to the community of participants and share a common social understanding of the organization. As a board member, I have unique access to not only fellow members of the organization, but also to documentation and historical

knowledge. As a student, I have been invited into the community from a different perspective to design a participatory process that collects information from relevant stakeholders to inform strategic planning documents. Participating through these various, and sometimes nuanced, roles over time offered a unique opportunity to gain insights into the SAVE organization.

Engaged research often provides access to deeply entrenched organization experiences (Shockley-Zalabak, 2017) and as such, requires a high level of trust, transparency, and ethical commitment (Hartwig, 2014). Continuous self-reflection and careful adherence to established protocols created the space necessary to facilitate the data collection process and draft SAVE's strategic plan while feeling confident that I maintained integrity and held true to the values and perspectives communicated to me during the process.

Advancing communication

Engaging community, who was included and how they were included, was informed by and played to a second Leadership Communication focus area – advancing communication. Collaboration with all participants in determining the goals and scope of the process and in developing the intervention strategies ensured communication was more than a one-way transmission of knowledge (Hartwig, 2014). Instead, the inclusive and reflexive process created openings for challenging conversations about difference and will shape SAVE's identity and future organization practices (Barge, et al., 2008; Deetz, 2008).

Advancing communication in engaged research calls on the researcher to stimulate and sustain a cooperative form of inquiry (Carcasson & Sprain, 2016; Garner, 2015). Insights gained through initial participatory activities including the focus group and open forum helped inform subsequent engagement. Early in the data collection process, participants shared diverse views on who the organization serves, where programs will be offered, and future program priorities –

aspects that are key to a strategic plan. Facilitation techniques and activities in the virtual retreat were designed to help surface these potential tensions and provide a space for communication across perspectives.

As described by Carcasson and Sprain (2016), “communities need better processes for discovering, understanding, and managing tensions” (p. 41), as well as genuine opportunities to work through inherent tradeoffs and paradoxes to value-laden issues. Ignoring dissent in favor of harmony and cohesiveness comes at the expense of effective decision-making (Garner, 2015). Several areas of tension and dissent surfaced during the initial data collection process. Each of these areas related to potential changes in the future of the organization, changes that could be experienced as opportunities for SAVE, but also as losses. O’Malley and Cebula (2015) suggest that most do not experience a distinction between change and loss and that mobilizing others in addressing tough challenges requires us to speak to loss. Providing participants the space to describe the potential losses that may occur with organizational changes builds trust, validates feelings and perspectives, and creates a means for moving forward (O’Malley & Cebula, 2015).

Well-designed and implemented facilitation techniques can help organizations manage communication challenges as they work towards their future goals (Hartwig, 2014). SAVE was founded to serve military servicemembers and veterans and as such, the majority of the organization’s leadership and participants have a military connection. Communication in the military follows a chain of command and who contributes ideas and perspectives is defined by rank and status. While the participatory process engaged in this research was designed to gather diverse perspectives to inform the organization’s strategic plan, long-term, an aim of the facilitation techniques employed was to cultivate an ongoing open communicative practice for the SAVE community.

Leading change

Engaging community and advancing communication through engaged scholarship can set the stage for the third outcome of Leadership Communication - leading change. With respect to this research, change is both practical and scholarly. Practical changes may be realized by the implementation of the strategic plan and changes in SAVE's communicative practices. Scholarly change may occur in that the process provided an opportunity to evaluate theory and consider the possibilities for engaging leadership communication processes such as AI in facilitating organization change, especially as it relates to veteran service organizations. Combining these outcomes, this research afforded the space to explore the relevance of theory and inform practice, as well as the opportunity to influence organization change (Shockley-Zalaback et al., 2017). While such change may seem pragmatic, engaged research and the embodied presence of a researcher calls to attention the everyday patterns of community and communication. One cannot dismiss even the micro-impacts that can be accomplished through such engagement (Ellingson, 2009).

While strategic planning may be an ongoing practice for an organization and not embarked upon for the purpose of creating radical organization transformations, strategic practices are focused on the future and the achievement of change. Strategic planning is an iterative, recursive and reciprocal process whereby the organization, its members, and its practices are continuously changing and shaping the other (Giddens, 1976; Hendry & Seidl, 2003). For the SAVE organization, this strategic planning process provided the opportunity to imagine how might the future differ from today and what should be or could be instead of what is.

Rather than a deficit approach, I chose to employ an appreciative change model for this research. A deficit approach to community and organization change seeks to identify problems and develop actions to solve those problems, whereas an appreciative approach to change builds on core values, resources, strengths, and assets of a system (Barge, 2016). Rather than designing a participatory process to surface issues and chart a path towards addressing problems, the process designed for this research project reflected a positive change model focused on identifying SAVE's core values, strengths and assets, and identified actions to build and grow these capacities.

Researcher Subjectivity

The following subjectivity statement provides an explanation of me as a student and researcher in relation to the people and communities reflected in this research project. The purpose of this statement is to explore the ways my background, experience, beliefs, and feelings may affect my research. As a student engaged in community-based research, I am provided a unique and valuable learning opportunity to become a co-creator of knowledge, integrating the classroom with real-world problems (Longo & Gibson, 2016). With this opportunity comes the responsibility to reflect, consider, and communicate the ways my personal subjectivities may influence the research and the communities with which I am engaged.

I am what has been coined an "Army Brat." My father enlisted in the U.S. Army at the age of 18, serving two tours of duty in Vietnam, and retiring as a Chief Warrant Officer (CW2). During this time, he married my mother and both my sister and I were born in Fort Ord, California, while my father was attending the Defense Language Institute. We moved frequently, from one Army installation to the next, following my father's assignments. Even after retirement, my father continued his career as a civilian as a defense contractor designing military

weapons tests. It would be safe to say that much of what I recall from my childhood, from trips to the Commissary to dinner conversations, revolve around the military. As an adult, I have a deep sense of patriotism and volunteer for organizations that support active and veteran servicemembers.

While working for the Kansas Department of Agriculture (KDA), I was invited to join the SAVE board. In that capacity, my participation on the board was intended to help advance the expressed role of SAVE to address workforce development challenges in agriculture. As a board member since 2016, I have had the opportunity to witness and play a part of the growth and challenges of the organization. Such deep involvement in the origins and development of the organization may call into question my ability to critically evaluate SAVE's successes and weaknesses and to contribute to a meaningful strategic planning process.

To remove these subjectivities would be impossible. Instead, my goal is to first communicate these subjectivities and then continually explore the ways in which my subjectivities may have influenced data analysis. Employing methods and tools such as crystallization and member reflection also offer opportunities to limit my personal influence by confirming observations through multiple sources.

Limitations

This study was delimited to a single nonprofit veteran service organization located in the state of Kansas. Limitations to this study are directly associated with the delimitations and include the generalizability of the findings and the volume of data collected. First, while the findings may be useful for understanding and designing strategic planning processes for other organizations, the observations and data collected are unique to the SAVE participants and may be influenced by the personal connection of the researcher to the organization. The term

“generalizability” falls into a category Bhattacharya (2017) considers questionable as it is a term more commonly employed in quantitative research and may not be a good fit when describing qualitative research. Generalizable suggests that the findings can be isolated from any particular context or situation (Tracy, 2010). The findings from this research apply specifically to the SAVE organization and cannot be separated from context or situation. While the results may not be generalizable, steps have been taken in the description of the methodology such as capturing extensive details of the context and process to promote transferability. Transferability requires that the findings are meaningful to the reader and presented in such a way that the reader can envision how the research overlaps with their own situation (Jones et al., 2013; Tracy, 2010). With more than 40,000 nonprofit organizations focused on servicemembers, veterans, and military families, many of which offer programs to support military veteran mental health, efforts to uphold transferability will ensure the usefulness of the findings to similar organizations (Pederson et al., 2015).

As a SAVE board member since 2016, I had permission and access to several years of meeting minutes, reports, and financial statements. I also wanted to ensure the participatory process designed to inform the strategic plan was inclusive and well informed. These two items together resulted in more data than perhaps necessary for this study. These data will be available for future studies.

Significance of the Study

The exploration of sensemaking, meaning-making and practice perspectives in the development of a strategic plan for the SAVE organization was significant in both practical and theoretical ways. From a conceptual and theoretical standpoint, this research contributes to a growing body of practice-based organization studies, research literature that has largely ignored

military organizations. Practice-based research is concerned with strategy as an activity in organizations, including the interaction among people, rather than strategy as a property of the organization (Johnson et al., 2007). This study applies a social constructionist approach to understanding how various strategic actors in a nonprofit veteran service organization negotiate their roles in the construction of strategy and engage with the strategic text.

For practitioners, this research provides a framework for a participatory strategic planning process that may be useful for other military veteran service organizations. And finally, from a practical perspective, this engaged research provided the opportunity to explore the successes and challenges of the SAVE organization to inform the organization's future priorities and direction. Ultimately, the strategic planning process and strategic plan product will assist the organization in meeting its mission and vision.

Summary

This chapter provided a description of the research framework and highlighted the researcher's commitment to community-engaged scholarship organized by the three areas of focus in the Leadership Communication program – engaging community, advancing communication, and leading change. In addition to the rationale for the study, this chapter outlined the contributions this research makes, both practically and conceptually. This chapter provided a description of the nature and significance of the shift from top-down military strategic planning processes to nonprofit strategic planning, as well as the role of AI in making this shift. This chapter also presented the researcher's subjectivities, as well as the limitations and significance of the study.

The following chapter, Chapter 2, provides a literature review on topics spanning a background of the SAVE organization, the theoretical framework informing this research, and

the strategic planning process typical of military organizations compared to nonprofit organizations.

Chapter 2 - Literature Review

The following review of current literature opens with a brief description of the SAVE organization's history, followed by a summary of the relevant literature related to military veteran behavioral health, military veteran agricultural training programs, and behavioral health interventions. This background will be useful context for understanding the SAVE organization's mission, vision, and purpose, context key for the purposeful and effective drafting of the organization's strategic plan.

Following the background, this chapter includes a brief literature review and introduction to Appreciative Inquiry (AI). In this research, AI is used both as an approach to organization development and as a research strategy. In this chapter, the principles of AI that connect theory to practice are outlined, while the aspects of AI as a methodology are reserved for Chapter 3. As there are very few reports of AI being used as a strategic planning tool in a military setting, this chapter also includes literature review and discussion about how the unique characteristics of a military context can result in both challenges and opportunities for the use of an appreciative approach to organization change.

This chapter also includes a brief literature review related to nonprofit and military strategic planning for understanding the sensemaking and meaning-making process observed during SAVE's strategic planning process. This literature will help distinguish the strategic planning process typical of military organizations compared to other organizations. It will also provide context to the tensions observed in moving from a top-down command and control to a more inclusive and participatory strategic planning process.

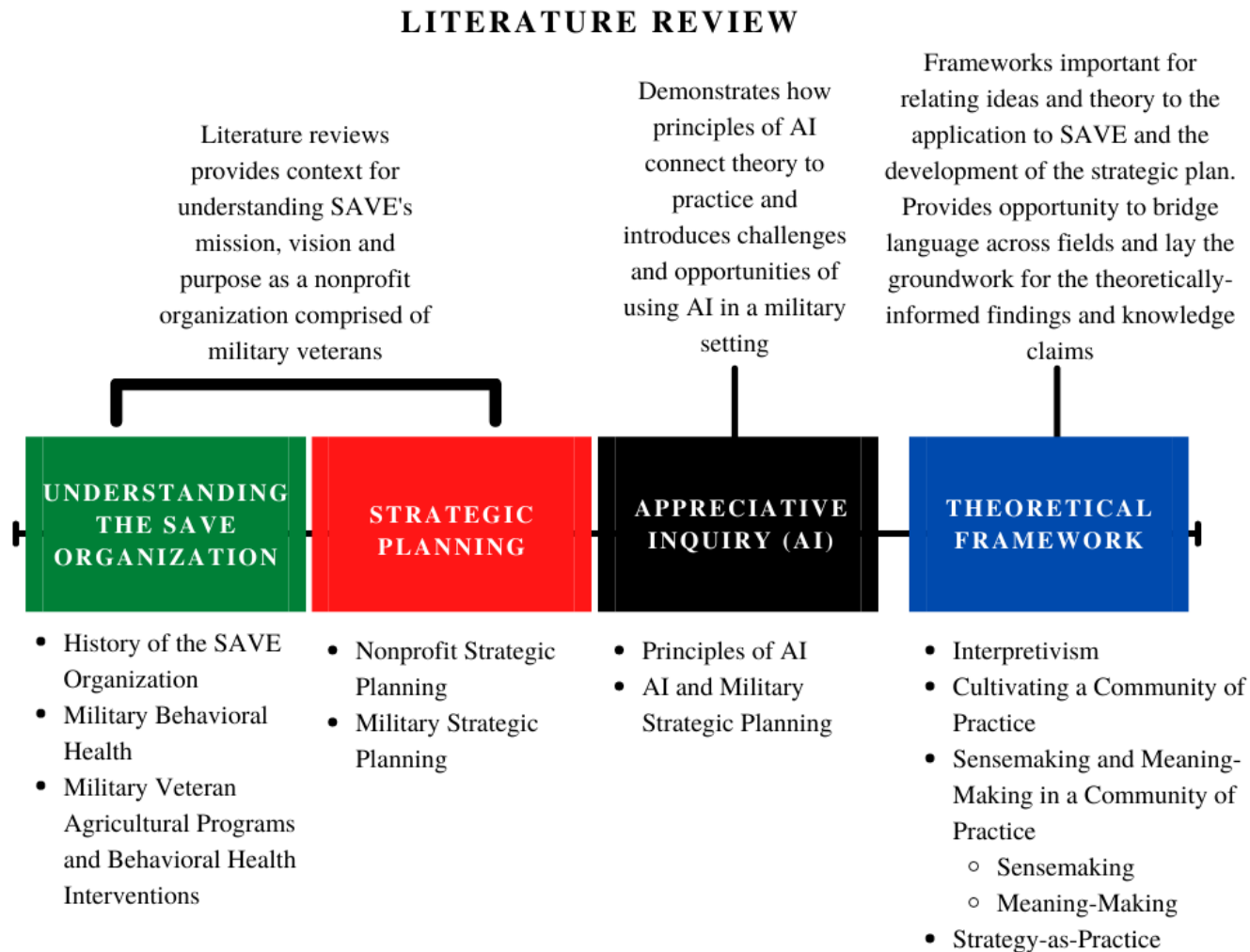
This chapter concludes with a description and literature review of the theoretical frameworks informing this research. These theoretical frameworks include interpretivism,

sensemaking and meaning-making in a community of practice, and strategy-as-practice. These frameworks are important for relating ideas and theory to the application to SAVE and the development of the strategic plan. The conceptual and theoretical literature review also provides the opportunity to bridge language across fields and lay the groundwork for the theoretically-informed findings and knowledge claims.

What follows in this chapter is a diverse review of the literature covering topics from veteran behavioral health to strategy-as-practice. While the content may seem disparate, this collective review of current literature provides a comprehensive foundation for approaching both the practical and theoretical aspects of this study.

Figure 2.1.

Organization and Approach to Literature Review



History of the SAVE Organization

The following history of the SAVE organization is based on a review of board meeting minutes, archival organization documentation, and interviews with the organization's members. The SAVE organization concept grew out of a conversation between SAVE's founder and his daughter in October 2012. Drawing on experiences with soldiers at Fort Riley participating in a greenhouse project while receiving therapy, the two envisioned a training farm for veterans and transitioning military servicemembers that provided integrated therapy for those suffering from both visible and invisible combat wounds. Developing the concept further, a pilot project kicked off in 2013 by offering beekeeping training courses for 200 veterans and soldiers from Fort Riley's Warrior Transition Battalion. The purpose of the pilot training project was to gauge interest in this agricultural sector and to identify opportunities to build a larger-scale, self-sustaining program. Based on the pilot project's success, the founders began developing their concept into a formal organization.

During an initial meeting in December 2015, potential collaborators from Kansas State University, the Kansas National Guard, AgrAbility, Kansas Farm Bureau, and Frontier Farm Credit, as well as several regional farmers explored the issues of a declining and aging agricultural workforce and the need for services to assist transitioning military servicemembers. As an outcome of this meeting, the official name Servicemember Agricultural Vocation Education (SAVE) was selected, and a board of directors and chair were identified. Following that meeting, the articles of incorporation for the organization were filed with the State of Kansas, bylaws were drafted, and shortly thereafter, SAVE received official designation as a not-for-profit charitable, educational corporation operating under Section 501(c)(3) of the Internal Revenue Service (IRS) code.

Over the next two years, the board continued to meet monthly, and the organization's available programs grew to include farm tours, and a focus was placed on sharing SAVE's purpose and vision with a larger audience. In 2017, a beekeeping supply operation, Golden Prairie Honey Farm, was added to SAVE to facilitate woodworking, metalworking, and small business training as part of the existing agricultural training program. The award of a grant from the U.S. Department of Agriculture (USDA) in 2018 allowed SAVE to significantly increase the number of beehive colonies available for training and honey production, expand the farm tour program, and offer a mentorship program. In 2019, through funding support from a USDA grant, SAVE hired their first Chief Executive Officer.

The organization has continued to explore partnerships to develop and deliver an accredited agricultural curriculum eligible for educational assistance under the Servicemen's Readjustment Act of 1944, or the G.I. Bill. After conversations with Highland Community College and Kansas State University, SAVE ultimately decided to partner with Cloud County Community College to provide the classroom portion of the curriculum. The first cohort of 15 students participating in a 40-hour accredited certificate training course joined the program in January 2019. SAVE continues to explore possible collaborations with Kansas State University to provide online delivery of the agriculture courses. In 2020, SAVE was officially recognized and promoted by the USDA as farm-based education and by the U.S. Department of Veterans Affairs (VA) as a Farm Cooperative Training Program. With these designations, SAVE will be eligible to collect G.I. Bill compensation for tuition.

Initially, hands-on agriculture training was conducted on a 155-acre parcel of property owned by a local producer. In 2017, SAVE entered into a lease agreement to farm 320-acres near Riley, KS. Students from K-State's College of Architecture, Planning and Design, with advice

from experienced architects, farm engineers, Veteran's administration officials and clinical specialists, staff and soldiers from Fort Riley, and regional farmers, developed design plans for the 320-acre property, including a welcome center, dormitories, and dining hall. In 2020, through a conservation loan and in cooperation with The Nature Conservancy, SAVE purchased the Riley property and now operates the farm for training.

Military Veteran Behavioral Health

The next two sections summarize the relevant literature related to military veteran behavioral health, military veteran agricultural training programs, and behavioral health interventions. SAVE's mission and programs seek to address military veteran behavioral health concerns through agricultural training. The following literature review places SAVE's mission in the context of a growing nationwide occurrence of behavioral health issues and similar programs to address this concern.

There are almost 20 million veterans in the United States and most of them live in rural areas with limited resources and income (NCVAS, 2018). According to the Department of Defense (DoD), nearly 200,000 servicemembers are expected to separate from active duty each year, and approximately 1,300 veterans return to civilian life each day (Review of Opportunities and Benefits for Military Veterans in Agriculture, 2016). Of those military personnel returning to civilian life, many have experienced multiple deployments and combat experiences, including the more 2,000,000 servicemembers who served in the recent conflicts, Operation Iraqi Freedom (OIF), Operating Enduring Freedom (OEF), and Operation New Dawn (OND) (Donoghue et al., 2014).

Many of these veterans and transitioning servicemembers suffer from invisible and visible war wounds (Walker et al., 2017). Approximately 20 percent of the veterans of the

conflicts in Iraq and Afghanistan are struggling with behavioral health concerns, such as post-traumatic stress disorder (PTSD), traumatic brain injury (TBI), depression, and substance use disorders (Pederson et al., 2015). The VA reported that in 2014, approximately 20 veterans died from suicide each day (Kashiwa, Sweetman, & Helgeson, 2017). The rate of suicide among veterans continues to increase compared to the prevalence of suicide among adult civilians (VA, 2016). Factors contributing to the high rate of suicide and vulnerability to mental health conditions can include frequent or prolonged deployment, disruption to family life and relationship problems, social isolation, and the challenges associated with departing from the structure of the military and sense of belonging when adjusting to civilian life (Wise, 2015, Kashiwa, Sweetman, & Helgeson, 2017).

Unfortunately, many veterans suffering from behavioral health problems do not seek services for those problems (Pederson et al., 2015). Left untreated mental health conditions have wide-ranging and negative consequences for veterans and society, including lost work productivity and relationship dysfunction (Kashiwa, Sweetman, & Helgeson, 2017). Even though most military veterans have access to quality, affordable medical and behavioral health care through the Veterans Health Administration (VHA), many do not seek services there. Younger veterans below the age of 45 are even less likely to seek care (Pederson et al., 2015). Barriers to seeking care may include challenges with finding time off work or childcare, lack of knowledge of where to receive care or what affordable care options are available, and concerns related to the stigma of seeking mental health care (Pederson et al, 2015). As described by Joana Wise in the book *Digging for Victory* (2015), “coming from a ‘macho’ Armed Forces culture, many veterans with mental health problems feel ashamed of their ‘invisible injuries,’ seeing them as a weakness to be hidden” (p. 12).

In response to the growing occurrence of behavioral health issues and increasing rate of suicide among American military servicemembers and veterans, a variety of interventions, including policy changes, public-private partnerships, and integrated health programs, have been initiated in the past decade. In August 2012, President Barak Obama signed an Executive Order to improve veterans' access to mental health services, servicemembers, and military families. The Executive Order called for expanded staffing at the VA Health Services, improved research and development into the underlying mechanisms of PTSD and TBI and effective treatments, and increased capacity of the Veterans Crisis Line (Executive Order No. 13625, 2012). Policy changes to improve veterans' behavioral health care continued under the Trump and Biden administrations. The VA has now expanded mental health services to all departing servicemembers for 12 months following separation from the military, which is regarded as the highest risk period for suicide among veterans (Veteran Suicide Prevention, 2018).

The 2012 Executive Order also called for enhanced partnerships between the VA, VHA, U.S. Department of Health and Human Services (DHHS), and local community providers to improve access to care for veterans in the community (Executive Order No. 13625, 2012). The call for such partnerships resulted in programs such as the Los Angeles Veterans Collaborative (LAVC). Administered by the University of Southern California Center for Innovation and Research on Veterans and Military Families (CIR), LAVC focuses on veterans' behavioral health via a structured network of hundreds of public and private agencies working to improve access to services, reducing barriers and coordinating care, and influencing health care policy (Los Angeles Veterans Collaborative, 2020). Key components to the LAVC public-private partnership approach success include established connections in the local community, credibility in the veteran community, and access to resources to support partnerships (Pederson et al., 2015).

More than 40,000 nonprofit organizations focus on servicemembers, veterans, and military families, many of which offer programs to support military veteran mental health (Pederson et al., 2015). For example, the Wounded Warrior Project provides programs for veterans and servicemembers who incurred physical or mental injury while serving in the military on or before September 11, 2001 (Wounded Warrior Project, 2020). Michael Richardson, Vice President of Independent Services and Mental Health for the Wounded Warrior Project, describes their approach to mental health programs as integrated, comprehensive, holistic, and focused on resilience and psychological well-being (Veteran Suicide Prevention, 2018). While such public-private partnerships and nonprofit organizations have been highlighted as a potential solution to address gaps in veterans' services, little research exists on the effectiveness of these partnerships and organizations in improving veterans and their families' behavioral health care. Nationwide, more research and evaluation is needed to identify the nature of partnerships and type of organizations needed to serve as models and to set policy frameworks for local governments to follow (Pederson et al., 2015).

Military Veteran Agricultural Training Programs and Behavioral Health Interventions

On average, U.S. farmers are aging, with more than a third over the age of 65 (USDA NAAS, 2017). With many of these farms in the last generation of family ownership, there is a need for a skilled agricultural workforce to address this farm succession challenge (Tsoodle, 2016). It is estimated that despite advances in technology, more than one million additional workers are needed to fulfill jobs in agriculture and food production (Workforce Challenges Facing the Agriculture Industry, 2011). While the demand for agricultural workers continues to grow, so does the demand for locally grown food (Donoghue et al., 2014). According to the

Department of Labor (Farmer Veteran Coalition, 2014), many existing and transitioning veterans are interested in careers in farming or agriculture-related occupations. Many American military veterans come from rural areas. About 45 percent of returning veterans grew up in rural America, and many express a desire to return to those rural communities (Donoghue et al., 2014).

To support transitioning military veterans interested in careers in agriculture, the USDA has developed several grant programs and dedicated portions of existing programs to military veterans. For example, five percent of the Beginning Farmer and Rancher Development Program funding is set aside specifically for military veteran farmers and ranchers. Direct operating loans and loan waivers are available through the Farm Service Agency (FSA) for qualified veterans. In 2017, USDA budgeted \$2.5 million for a new competitive Food and Agriculture Resilience Program for Military Veterans (Farm-Vets/Ag Vets) through the National Institute of Food and Agriculture (NIFA). This program supports projects and research to understand better career opportunities and therapeutic interventions for veteran populations in the food and agriculture sector (Review of Opportunities and Benefits for Military Veterans in Agriculture, 2016).

Even with the expanded funding and growing demand for agricultural training, there is a lack of targeted training programs offered by the VA and other federal agencies (Donoghue et al., 2014). Private organizations, often in partnership with state departments of agriculture or local universities, have formed to address this gap. For example, the Soldier to Agriculture Program is a five-week training program offered through North Carolina State University. Held at Fort Bragg Career Resource Center in North Carolina, the program provides both hands-on and in-class training to veterans interested in careers in agriculture (Soldier to Agriculture Program, 2020). In New York, with funding from the State Department of Agriculture and

Markets, the Farm Ops program offers scholarships to veterans and active-duty military personnel who attend agriculture-related educational events and workshops. Farm Ops is also working with the New York Division of Veterans Affairs to identify five New York farms that are willing and can be approved to provide veterans' on-the-job training opportunities (Farm Ops, 2020). In a review of 22 veteran agricultural training programs across the U.S., many describe healing and integrated therapy as part of their programs and mission.

While little evidence-based research has been conducted to document the benefits, programs that incorporate horticultural therapy into agricultural training aim to improve veterans' physical, cognitive, psychological, spiritual, and social well-being (Wise, 2015). According to the American Horticultural Therapy Association (AHTA), horticultural therapy, or social and therapeutic horticulture, is the engagement in horticultural activities, such as gardening, facilitated by a trained therapist to achieve specific and documented treatment goals (AHTA, 2013). Horticulture may play a significant role in building resilience, which is recognized as a key aspect of treatment and the prevention of relapse for veterans with PTSD. Having endured multiple combat deployments and witnessing, or perhaps even inflicting, death, growing plants and creating life through agriculture may mitigate the “moral injury” and provide healing for the “psychological wounds” veterans experience from combat-related trauma (Wise, 2015, p. 48). Although limited, research on horticultural therapy's effectiveness has demonstrated positive emotional benefits, enhanced health, improved social well-being, and increased vocational skills and work experience (Wise, 2015).

What role might agriculture and food production play in behavioral health therapy for military servicemembers and veterans? If the extent of horticultural therapy research is limited, verification of the effectiveness of agricultural-related therapy is even more scant (Wise, 2015).

However, a growing body of anecdotal evidence warrants further evaluation of case studies and research into the role of farming as an integrated component of a successful behavioral health program. Donoghue et al. (2014) suggest that “farming offers veterans a conciliatory, holistic approach to deal with their PTSD, because it offers a sense of accomplishment, self-esteem, and control while providing time for contemplation and a basis for networking with other veterans and their families with a focus on farming” (p. 84). Agriculture may offer veterans the chance to use the skills and discipline gained during their military service to provide for their local communities while developing career options for themselves (Donoghue et al., 2014).

Programs such as the Central Oregon Veterans Ranch (COVR) seek to demonstrate the effectiveness of farming on veteran mental health. Incorporated as a 501(c)(3) nonprofit organization in 2014, COVR offers training and behavioral health therapy to military veterans on a 19-acre farm located in Central Oregon (COVR, 2020). During a Congressional hearing to the Senate Committee on Appropriations (2016), Alison Perry, Executive Director of COVR and licensed professional counselor, described agriculture as a “viable therapeutic option for veterans.” In her experience and observation, these therapeutic benefits can be attributed to the assistance in transitioning to civilian life, physical activity, interaction with nature, community engagement, caring for living things, and completion of defined tasks (Review of Opportunities and Benefits for Military Veterans in Agriculture, 2016).

Despite the potential behavioral health benefits of agriculture and food production, it is essential to keep in mind that farming is a stressful career. According to the U.S. Centers for Disease Control and Prevention, the rate of suicide among farmers and ranchers is two times the national average (Perdue, 2018). Market fluctuations, trade upheaval, and natural disasters contribute to farmer stress (Reed & Claunch, 2020). The recent Farm Bill included language and

a commitment of \$10 million to provide stress assistance programs for those engaged in agriculture-related occupations (Congressional Research Service, 2019). While stress in agriculture may not be new, the availability of targeted funds and programs to address the continuing and growing mental health problem among rural and farm populations is new. For this reason, little research is available to understand better agriculture-related depressive symptoms and suicide and the effectiveness of therapeutic interventions (Reed & Claunch, 2020). The shared challenges related to behavioral health conditions and treatments among farmers and military veterans may offer opportunities to cooperate in future research and programming.

These first three sections of the literature review provided a brief history of the SAVE organization followed by a summary of the relevant literature related to military veteran behavioral health, military veteran agricultural training programs, and behavioral health interventions. This background was useful for understanding the SAVE organization's mission, vision, and purpose, context key for the purposeful and effective drafting of the organization's strategic plan.

The following sections provide a description and literature review of both nonprofit and military strategic planning. As the SAVE organization is both a nonprofit organization and heavily comprised of retired military members, the following sections establish the context of the research problem. The literature review described in these sections provides perspective in understanding the sensemaking and meaning-making process observed during the development of SAVE's strategic plan. This literature will help distinguish the strategic planning process typical of military organizations compared to other organizations and will provide context to the

tensions observed in moving from a top-down command and control to a more inclusive and participatory strategic planning process.

Nonprofit Strategic Planning

The SAVE organization was founded in 2015 as a not-for-profit charitable, educational corporation operating under Section 501(c)(3) of the IRS code. While members of the organization had previously developed business plans and whitepapers describing SAVE's purpose and intent, the organization lacked a strategic plan. In December 2019, SAVE leadership requested K-State's assistance to develop their strategic plan.

Strategic planning has long been a practice in the corporate, for profit industry, but in recent years has become commonplace among all types of nonprofit organizations (Bryson et al., 2009, Reid et al., 2014). Compared to the private sector, nonprofit organizations face different strategic planning considerations and constraints. Nonprofit strategic planning often requires collective input from a variety of volunteers, employees, donors, and stakeholders, each with potentially highly charged views of the organization's priorities. Conducting an inclusive and participatory planning process requires time and funding, two resources which nonprofits, including SAVE, may find themselves chronically short (Reid et al., 2014). The means by which private industry and nonprofit organizations measure strategic planning success also vary. Private sector effectiveness focuses on profit, growth, and consumer value, while nonprofit success is often thought of in terms of accomplishing a mission and achieving public values (Bozeman, 2007; Goggins, 2016; Reid et al., 2014).

Despite the challenges that nonprofits may face with strategic planning, many successful organizations credit collaborative strategic planning efforts as having a vital impact on the organization's overall success (McHatton et al., 2005; Reid et al., 2014). Committing to

deliberation and collaboration from the start of the strategic planning process creates a sense of ownership in the organization and demonstrates that stakeholders' knowledge, skills, and perspectives are valued (McHatton et al., 2005; Reid et al., 2014). Diverse participation throughout the strategic planning process may also promote discussion and reconciliation of conflicting views and principles key to achieving the organization's mission and priorities (McHatton et al., 2005). Drawing on these benefits described in literature of deliberation and collaboration, the processes designed to develop SAVE's strategic plan was intentionally inclusive and participatory.

Strategic planning in business and industry is typically treated as a fixed object with standardized categories and variables such as performance indicators and SWOT analyses (Strengths, Weaknesses, Opportunities, Threats) (Bryson et al., 2009). In keeping with the principles of strategy-as-practice detailed later in this chapter, the process for the development of a strategic plan for this nonprofit organization focuses on the performative aspects of the process, the actions of people in time and context. As described by Weick (1995) the actions are what are critical to lay "down the path for sensemaking" (p. 188). Observing the actions unfold along this path of sensemaking acknowledges that strategic planning is a complex social, cognitive, and even political practice "in which thinking, acting, learning, and knowing matter, and in which some associations are reinforced, others are created, and still others are dropped" during the formulation of the plan (Bryson et al., 2009, p. 176).

Military Strategic Planning

While SAVE is a not-for-profit charitable, educational corporation they are also an organization with leadership, a board, and members heavily comprised of military veterans. The following literature review describing military strategic planning helps contextualize the unique

challenges that may exist for inclusive planning and decision-making for an organization that is both a nonprofit and made up of military veterans.

Military strategic planning is a highly centralized activity conducted by and for senior leadership to evaluate risks, provide necessary forces, and design campaigns that protect national security. The “top-down planning method that begins with high-level strategic demands” (p. x) typical of military strategic planning contrasts significantly with the collaborative and participatory process designed for the development of SAVE’s strategic plan (Mazzar et al., 2019). Traditional strategic planning has been reserved for political and organizational elites. In the military context, strategy has been an issue of how to win wars and must be efficient, responsive to fast-changing circumstances, and produce internally consistent decisions (Johnson et al., 2003). In contrast as discussed later in this chapter, strategy-as-practice provides a turn to a more open and inclusive perspective, often challenging typical roles, and inviting multiple levels of an organization to actively participate in strategic work (Serrano et al., 2016).

The purpose, process, and even the language, of military strategic planning, differs from the type of planning that may occur within companies and organizations. The intended outcome of organization strategic planning is improved performance (McEwan, 2016). The ultimate aim of military strategic planning is to strengthen national security and to “build an efficient, functional and subordinate army” (Chairman of the Joint Chiefs of Staff, 2016; Westling et al. 2016, p. 9). In a strategic planning process that seeks grassroots perspectives, engagement is viewed as the process of bringing people together for discussion. In military strategic planning, engagement refers to a battle, and the goal of the use of engagement is to win a war (Kornberger & Engber-Pederson, 2019). As described later in this chapter, from a strategy-as-practice

perspective, a strategic actor is anyone who helps shape the construction of strategic activity. Strategy can emerge from all organization levels, not just top managers (Jarzabkowski, 2005).

In contrast, military strategic planning is rooted in a command and control philosophy where top-down control systems direct performance as means for achieving overarching goals (McEwan, 2016). Viewed as more objective, the ultimate power to determine strategic guidelines is reserved for top-ranking military officials. As illustrated in interviews with military officers in a study conducted by Westling et al. (2016), officers working on strategic planning tend to see “the normal staff working in garrisons and in lower positions as outsiders when it comes to strategy work” (p. 11). The U.S. Air Force's recent efforts to broaden participation in strategic planning to reflect a bottom-up approach and bring in “very respected external folks” seek to improve buy-in and collective support, not to incorporate diverse perspectives (Barzelay & Campbell, 2003, p. 43). Even the term “strategic actor” takes on a markedly different meaning in military strategic planning. In military strategic planning, the concept of broadening the definition of strategic actor does not consider stakeholders, partners, and all levels of the organization. Instead, “actors of strategic significance” (p. 44) include terrorists and insurgents who seek to harm the U.S. and interests abroad (U.S. Department of the Army, 2006).

The following sections provide a description and literature review of the conceptual and theoretical frameworks informing this research. This literature review serves several purposes including demonstrating knowledge about the concepts and theories, gaining methodological insights, distinguishing where the theories and concepts have been applied and what remains to be done, and defining the vocabulary that will be used to relate the research findings to these frameworks.

Appreciative Inquiry

Appreciative Inquiry (AI) is an approach to organization change based on the premise that questions and dialogue about strengths, successes, values, hopes, and aspirations are themselves transformational (Whitney & Trosten-Bloom, 2010). Five principles serve as the foundation of AI and connect AI from theory to practice (Figure 2-2) (Cooperrider et al., 2008). These principles are that AI is constructionist, simultaneous, anticipatory, poetic, and positive (Cooperrider et al., 2008). Collectively, these principles make AI an appropriate process for leading organization change. These principles served as precepts for designing the participatory process for this research.

Figure 2.2.

Five Principles of Appreciative Inquiry



The constructionist principles recognizes that organizations are living, human creations and that human knowledge and organizational destiny are interconnected (Cooperrider & Whitney, 2006; Fitzgerald et al., 2003). The principle of simultaneity proposes that change begins at the moment of inquiry (Mohr & Watkins, 2002). As described by Cooperrider and Whitney (2006), “the seeds of change - the things people think and talk about, the things people discover and learn, and the things that inform dialogue and inspire images of the future - are

implicit in the first questions asked” (p.285). Storytelling is at the heart of the poetic principle and suggests that an organization’s past, present, and future are sources of inspiration. An organization’s story is constantly being co-authored (Bushe & Kassam, 2005; Fifolt & Lander, 2013; Fitzgerald et al., 2003). The anticipatory principle states that people and organizations tend to move in the direction of the images we create. Therefore, positive images of the future lead to positive actions (Cooperrider & Whitney, 2006; Fifolt & Lander, 2013). “Our behavior is influenced by the future we anticipate” (Mohr & Watkins, 2002, p. 5). The positive principles sets the stage for sustained positive change in “which individuals choose to envision the possibilities for a positive future rather than dwell on the negative aspects of their situation” (Fifolt & Lander, 2013, p. 21). This long-lasting change process is built on things like hope, excitement, purpose, possibility, and joy (Bushe & Kassam, 2005; Cooperrider & Whitney, 2006; Fitzgerald et al., 2003).

Appreciative inquiry and military strategic planning

An appreciative inquiry approach has been applied to many industries, but there are very few reports of AI being used as a strategic planning tool in a military setting (Heflin et al., 2016). Ruburiano (2019) employed AI in interviews of military veterans in Federal civil service to identify opportunities to improve workforce reintegration and retention. Futrell (2017) used AI while interviewing active duty airmen to gain insight into the Sexual Assault Prevention and Response (SAPR) training conducted by the Air Force. Powley et al. (2004) conducted a large AI summit to assist the Navy’s Information Professional (IP) Community to create a mission and develop strategic priorities for the future. Heflin et al. (2016) applied AI to a military organization in the western United States that was struggling with low morale and discontent. While the number of studies and reports demonstrating the application of AI in a military setting

may be few, they highlight some of the unique characteristics of a military context that can result in both challenges and opportunities for the use of an appreciative approach to organization change.

Engaging with an organization heavily comprised of military veterans and applying AI to promote strategic change requires a fundamental understanding of the cultural foundations of a military setting (Heflin et al., 2016). From the first day of basic training, the U.S. military transforms individuals from all social classes and backgrounds to servicemembers collectively committed to the goal of national security. This transformation occurs through a process of what Van Maanen and Schein (1979) call institutional socialization. Institutional socialization is a process by which one learns the ropes of a particular role and accepts that role in the context of other organization roles to maintain the existing culture and structure. In the military, institutional socialization creates a deep appreciation of rank and hierarchy that lasts even when individuals transition to civil life and no longer hold military rank (Heflin et al., 2016). The U.S. military operates through a structure characterized by a rigorous adherence to command and control. Appreciative inquiry creates a space where hierarchy and command and control decision making are temporarily suspended (Powley et al., 2004). While an AI approach may increase participation and the pool of strategic ideas, it is important to be mindful that participants may view this as challenging the chain of command. In addition to a deep appreciation for rank and hierarchy, the U.S. military is steeped in tradition. Future military decision-making often draws on history and values past decisions. The tendency to protect the past may mean that the futuring, dream phase activities AI may be met with a resistance to change (Heflin et al., 2016).

Another key characteristic of the military culture is that it is problem-based (Heflin et al., 2016). Military planning is focused on identifying the enemy and devising strategies to defeat it.

This problem-solving approach is fitting and effective in military organizations. While AI does not ignore challenges, the methodology is fundamentally positive (Powley et al., 2004; Reburiano, 2019). Therefore, an appreciative approach may feel “weak” to military leaders and “perceived as skirting a problem rather than facing it head-on” (Heflin et al., 2016, p. 75). When designing an AI process for military organizations, it is important to identify opportunities to surface problems and conflicts. Embracing the full range of positive and negative experiences and reframing problems is key to AI’s power to create transformational change (Whitney & Trosten-Bloom, 2010).

Since its founding in 2015, SAVE has experienced many challenges including volunteer and personnel turnover, limited funding, inconsistent student recruitment and low student retention, and changing levels of support from partnering organizations. Members of the SAVE board also held conflicting views of the organization’s purpose, identity, and future directions. The development of a strategic plan was conceived as a means to address these challenges. Asking participants in such a challenging context to reflect on and assess their organization and practice can be a difficult and intimidating process. AI was selected as an opportunity to focus on SAVE’s strengths while helping to make sense of potential tensions that might arise. Participants in the strategic planning process and this research may be less defensive to share their honest perspectives knowing the inquiry would focus on the positive rather than SAVE’s problems (Shuayb, 2014). A discussion of the ways in which this AI process was adapted for SAVE to acknowledge an understanding and respect for the cultural foundations of a military setting is provided in Chapter 4.

Conceptual and Theoretical Framework

Three complementary conceptual and theoretical perspectives inform this research—interpretivism, sensemaking and meaning-making in a community of practice, and strategy-as-practice. Each of these three conceptual and theoretical frameworks were significant to this research from both a practical and knowledge-building standpoint. At times, these frameworks were important for relating ideas and theory to the application to SAVE and the development of the strategic plan. Beyond the practical aspects of these frameworks, the following literature review provides the opportunity to bridge language across fields and lay the groundwork for the theoretically informed findings and knowledge claims that will be made in Chapter 5.

As described in Chapter 1, this research has both practical and theoretical implications. For that reason, the product (strategic plan) and research questions align with those practical (RQ1) and conceptual and theoretical (RQs 2, 3, and 4) implications. In the following sections, attention is drawn to the boundaries between theory-informed claims and the contextual claims associated with the SAVE organization.

Interpretivism

Interpretivism views reality as socially constructed. The knowledge or meaning generated is relative, and the goal of the research is to gain understanding, not make firm predictions (Bhattacharya, 2017; Crotty, 1998; deMarrais & Lapan, 2004; Uhl-Bien & Ospina, 2012). This framework informs my approach to this project in that this research aims to seek answers to questions about how participants describe their experience, what values they share, and their points of difference. Answers to these questions are weak in prediction and unique to the given context (Bhattacharya, 2017), but help to appreciate better the participants' understanding of SAVE's strengths and factors limiting their vision of an ideal future for the organization. Key to

understanding the SAVE organization's work is the basic assumption that we are social beings and that we come to know and understand who we are and the world around us through our environment and our communities (Wenger, 1998). An interpretivist approach provides the opportunity to appreciate how participants negotiate their roles and explore how embedded tensions are mediated through the strategic planning process (Orr, 2009).

Interpretivism is an overarching framework connecting concepts from each of the following theories. Table 2.1 summarizes ideas that will be introduced in the following sections including the vocabulary central to the conceptual and theoretical frameworks used to relate to the research findings, as well as the application to the SAVE organization and the ways the theories informed the methodology.

Table 2.1.

Summary of Vocabulary, Application and Methodological Insights Connected to Conceptual and Theoretical Frameworks

Conceptual/ Theoretical Framework	Vocabulary Used to Relate Research Findings to Framework	Application to SAVE	Methodological Insight
Communities of Practice	Mutual engagement Joint enterprise Shared repertoire Ambiguity	Viewing SAVE as a community of practice that includes the members and partners who share values, activities, and mission	Cultivating a community of practice through facilitation Invite diverse perspectives Create space for productive disagreement
Sensemaking	Bracketing Labelling Framing	Contextualize sensemaking in military strategic planning	Ensuring a “Law of Requisite Variety” Creating opportunities for articulation of diverse perspectives

Meaning-Making	Naming Interpreting Making commitments to action Participation Reification	Connecting communication to the role of strategic planning for the SAVE organization	Ensuring diverse participation Creating opportunities for articulation of diverse perspectives
Strategy-as-Practice	Praxis Practice Practitioners Strategic Text Role of text in: Inspiring commitment Motivating change Legitimizing prior decisions	Applying a practice perspective to SAVE's strategic planning broadens understanding of the actual strategic and sensemaking processes of these types of organizations	Strategic Episodes Use of a facilitator

Cultivating a community of practice

Communities of practice are groups of people “informally bound together by shared experiences and passion for a joint enterprise” (Wenger & Snyder, 2000, p. 139). For an organization like SAVE, the community of practice includes the members and partners who share values, activities, and mission. What makes them distinguishable from other groups or collectives is activity. Communities of practice are people doing things together. They are “people united by more than membership in a group or category; they are involved with one another in action” (Drath & Palus, 1994, p. 11). Through their actions, communities of practice demonstrate a mutual engagement of participants who negotiate a joint enterprise and develop a shared repertoire (Wenger, 1998).

The mutual engagement of participants characterizes a community of practice. Practice and activity do not occur in the abstract or a vacuum. The community exists because people are

committed to doing things together and negotiating the meanings of those actions with one another (Wenger, 1998). Mutual engagement does not always suggest uniformity and harmony. Diversity in perspectives and participation levels makes engagement in practice productive (Wenger et al., 2002). The absence of conflict is not a necessary quality of communities of practice. Sustained interpersonal relationships often are marked by tension and disagreement (Wenger, 1998) and practice itself is dynamic, negotiated, and contested (Macpherson & Antonacopoulou, 2013). Cultivating an effective community of practice requires creating the opportunity for dialogue among perspectives, inviting different levels of participation, and recognizing the role of disagreement as a form of activity and participation (Wenger, 1998; Wenger et al., 2002).

Members of a community of practice are bound together by a negotiated understanding of who they are and what they are about (Wenger, 2000). Wenger (1998) describes this characteristic of a community of practice as a joint enterprise. A sense of mutual accountability gives rise to a sense of joint enterprise (Wenger, 2000), whereby members make sense of activities and discover together “what matters and what does not, what is important and why it is important, what to do and not to do, what to pay attention to and what to ignore, what to talk about and what to leave unsaid” (Wenger, 1998, p. 81). Promoting a joint enterprise builds social capital by creating events and interactions for community members to build trust and address real problems together (Wenger, 2000).

Communities of practice share a repertoire of routines, stories, symbols and ways of doing things that the community has developed throughout their existence (Wenger, 1998; Wenger et al., 2002). The repertoire includes discourses “by which members create meaningful statements about the world” and “express their forms of membership and their identification as

members” (Wenger, 1998, p. 83). A shared repertoire reflects a shared history of mutual engagement while remaining inherently ambiguous (Wenger, 1998). Ambiguity provides the space for negotiating meaning and enables a community to understand its development, reconsider assumptions, discover possibilities, and use self-reflection to move forward (Wenger, 2000) strategically. Many strategy researchers suggest that ambiguity is one of the defining characteristics of strategic change processes (Hendry & Seidl, 2003).

Key to understanding the SAVE organization's work is the basic assumption that we are social beings and that we come to know and understand who we are and the world around us through our environment and our communities (Wenger, 1998). How people make sense of their experiences and roles as members or partners of the SAVE organization is a primary question this research seeks to understand. This research also seeks to learn about the broader implications and possibility of engaging the leadership communication process in facilitating organization

change, especially related to veteran service organizations. In this context, leadership is envisioned as more than the traditional model of a heroic, designated leader and a group of obedient, committed followers. Instead, this model views leadership as a social meaning-making process (Drath & Palus, 1994). As described by Drath and Palus (1994), leadership is the process of making sense of what people are doing together in a community of practice. Together the community engages in an active process of producing meaning from everyday experiences (Wenger, 1998, Drath & Palus, 1994). In a community of practice such as the SAVE organization, leadership is seen as “flowing from meaning” rather than about making decisions and influencing people (Drath & Palus, 1994, p. 13).

This research provides the opportunity to observe a group of people who share a common concern and passion about a topic and seek to tackle issues by interacting on an ongoing basis. It

is not enough to assume that a community of practice exists simply because a group of people is engaged together in some common activity (Strycharz-Bañas, 2016). This research seeks to understand their engagement, the ways in which they organize themselves as a group and identify how they may be evolving as a community of practice. From an organization and strategic planning perspective, the value of communities of practice is the shared concern for achieving current goals, increased capacity for problem-solving, improved quality of decisions, and the ability to formulate new strategies for the future (Macpherson & Antonacopoulou, 2013; Wenger et al., 2002). Identifying opportunities to cultivate a community of practice for the SAVE organization helps inform the development of their strategic plan and increases the likelihood of successfully implementing that plan. The data collection for this research, including the focus group, open forum, and board retreat, were designed to promote the community of practice by creating a catalyst for the evolution of the organization based on their strengths, building on the collective experience of the community members while inviting outside perspectives, and focusing on the value of the organization (Wenger et al., 2002).

Literature review related to a community of practice supported this research's contextual and knowledge-claims. From a contextual standpoint, the potential benefits of cultivating SAVE as a community of practice provided methodological insights and motivated decisions to invite a diversity of perspectives and create space for productive disagreement (Wenger, 1998; Wenger et al., 2002). From a knowledge-building standpoint, the vocabulary inherent of communities of practice, mutual engagement, shared repertoire, joint enterprise, and ambiguity, are terms that will be used to relate the research findings to the community of practice framework. The view that communities of practice are defined by activity also connects to a fundamental characteristic of strategy-as-practice, another theoretical framework that informs this research (Drath & Palus,

1994). Sharing the relevant literature related to communities of practice and strategy-as-practice within this chapter creates a bridge of concepts across two theories not typically captured in the same source. Understanding SAVE as a community of practice is also significant in that it lays the groundwork for observing and understanding both sensemaking and meaning-making in the organization and throughout the strategic planning process.

Sensemaking and meaning-making in a community of practice

The terms sensemaking and meaning-making are often used interchangeably; however, they have slightly distinct connotations (Gurteen, 2020). Weick (1995, 2005) describes the act of sensemaking as retrospective and meaning-making as forward-focused. The terms are also used to describe related phenomena depending on the theory or conceptual framework. For example, the term sensemaking is often used in strategy-as-practice research and literature, while the term meaning-making is more common to community of practice research and literature (Cornelissen & Schildt, 2020; Drath & Palus, 1994). Both terms are key to understanding the individual and collective process SAVE participants navigated during the construction of their strategic plan. For this reason, the following section provides a brief literature review of both sensemaking and meaning-making to frame how the terms will be used in the context of this study.

Sensemaking

Sensemaking is an iterative process through which people attempt to understand their surroundings, issues, and events (Weick et al., 2005). As illustrated in Weick's analysis of the Mann Gulch fire, sensemaking begins with chaos and disruption. In the 1949 incident of the Mann Gulch fire, 15 smokejumpers were deployed to Montana to suppress what they considered a '10 o'clock fire', meaning the firefighters could have the blaze under control by 10 the following day. Within hours of their arrival, the fire crossed the gorge, gained intensity, and sent

the firefighters running. Recognizing the futility of attempting to outrun the blaze, foreman Wagner Dodge lit a fire in front of the crew and commanded the firefighters to drop their tools and lie down in the burned area. No one followed the command and the only survivors included Dodge and two men who escaped to a crevice in the ridge (Weick, 1993, 2007). Weick (1993) calls upon this incident as illustration of the collapse of sensemaking. During times of chaos such as the fire, it becomes “increasingly hard to socially construct reality” (p. 636) and individuals are challenged to draw on clues amidst the flow of activity to make decisions (Weick, 1993). While the disruption encountered by individuals in an organization when embarking on a strategic planning initiative is not as dramatic as the Mann Gulch incident, the interruption still calls upon individuals to drop their tools and connect the cues, develop frames to make interpretations, and assign sense to what is happening to the organization (Nowling & Seeger, 2020; Sandberg & Tsoukas, 2020). From a sensemaking perspective, the strategic planning process creates instability in members’ ways of understanding the organization, demanding they make some new sense of it (Gioia & Chittipeddi, 1991).

Sensemaking is a collective process broadly defined by three components: bracketing, labeling, and framing. Individuals notice and bracket particular cues from a stream of raw experiences for further sensemaking when the cue connects to prior work, training, and life experiences (Weick, 2005). Labeling seeks to categorize and “stabilize the streaming of experience” by imposing labels on interdependent events that suggest conceivable acts (Weick, 2005, p. 411). Labeling as a means for categorizing situations favors plausibility over accuracy as the standard for interpretations (Cornelissen & Schildt, 2020). Following bracketing and labelling, appropriate frames are selected to help interpret the cues. Choosing which frames to apply can be a contested and negotiated process influenced by politics and power, whereby

actors may try to convince others of specific frames' appropriateness. For example, a manager may attempt to make subordinates reject or give up commitments to an existing frame in favor of a new frame to promote organization change (Cornelissen & Schildt, 2020). Ultimately, this stage of sensemaking concludes when participants agree on the frame best suited to make sense of their cues (Seidl & Werle, 2015). Following a principle described by Weick (1995) as the 'law of requisite variety,' the inclusion of a variety of different people with varied backgrounds and experiences increases the diversity of frames available to the organization.

Similar to other strategic planning processes, sensemaking plays a central role in the work of military strategic planning. In the context of military command, sensemaking is an ongoing process performed when planning and executing a mission (Jensen, 2006). As described by Smart and Sycara (2013), sensemaking at both the individual and collective levels in military organizations “directly affects decision synchronization, force agility, and mission effectiveness” (p. 50). Factors influencing the quality of sensemaking include power, trust relationships, the quality of information sharing, and the timing and extent of communication (Smart & Sycara, 2013). Each of these factors are critical for the sensemaking process of reducing ambiguity, creating situational awareness, and generating understanding of highly complex situations to make decisions (Gurteen, 2020).

Comparable to the ideas presented in the cultivating a community of practice literature, Weick's (1995) principle of the 'law of requisite variety' informed the data collection process and inspired the decision to include a multitude of voices and perspectives (Wenger, 1998; Wenger et al., 2002). The three terms described above characteristic of the sensemaking literature and framework, bracketing, labeling, and framing, will be used to relate the research findings to this theory.

Meaning-making

According to Drath and Palus (1994), meaning-making is the process of naming, interpreting, and making commitments to actions. Meaning-making is about “constructing a sense of what is, what actually exists, and, of that, what is important” (Drath & Palus, 1994, p. 9). Meaning-making is a negotiated process involving both participation and reification (Wenger, 1998). Participation refers to the engagement in activity with others. It is both active and collaborative. The social aspect of participation makes it more than just engagement in practice and transforms the activity into a meaning-making process (Wenger, 1998). The “profoundly social character of our experience of life” is captured in the concept of participation (Wenger, 1998, p. 57). In conjunction with participation, the process of reification shapes our experiences by transforming abstractions to concrete objects. Reification gives “form to our experience by producing objects that congeal this experience into ‘thingness’” (Wenger, 1998, p. 58). For an organization such as SAVE, producing objects such as stories, business plans, archived meeting records, symbols and logos, and bylaws create a ‘thingness’ out of experience. These objects were generated through participation in a community of practice and indicate “larger contexts of significance realized in human practices” (Wenger, 1998, p. 61). Participation and reification were central to the negotiated meaning-making process with SAVE. Members and stakeholders at various levels and with diverse perspectives were invited to collaborate in a participatory process resulting in a strategic plan for the organization. Ultimately, the strategic plan is reifying, giving form to the experience.

Communication, as a part of the meaning-making process, in a community of practice collectively creates reality. In this way, communication literally constitutes or builds the social world (Koschmann, 2011, 2012). Communication is a social meaning-making process of

arranging our understanding of the experience by which human beings create relationships, coordinate actions, and construct knowledge of ourselves and the world around us (Drath & Palus, 1994; Putnam et al., 2009; Weick et al., 2005). From an organization standpoint, this communicative, meaning-making process creates and continuously reconstructs the organization (Putnam et al., 2009; Wenger, 2000). Organization communication research describes this notion as communication being constitutive of organization but typically does not connect the process to strategy. However, the constitution of organizations over time “implies the ongoing patterns in organizational actions,” (p. 1172) a concept that is relevant to understanding strategy (Fenton & Langley, 2011). Questions central to describing the four communication flows set forth by McPhee and Zaug (2000) are also key to the discovery process for organization strategic planning: “Who are we?”, “What rules do we operate by?”, “What work are we doing together?”, and “What external forces provide legitimacy, and what kinds of communication are necessary to please them?” (Putnam & Nicotera, 2008, p. 92).

Acknowledging that humans have their own unique thoughts, interpretations, and meanings of the world around them, it is likely that both sensemaking and meaning-making processes will require constant negotiation of diverse and opposing perspectives (Wenger, 1998). Negotiating differences in meaning may surface tensions, including the clash of ideas, values, actions, and pursuit of competing goals. Participatory processes such as the one designed to develop SAVE’s strategic plan should encourage the articulation of diverse perspectives and attend to the pressures and tensions felt by participants (Stohl & Cheney, 2001).

Not unlike communities of practice and sensemaking, articulating diverse perspectives is key to the meaning-making process (Wenger, 1998). This aspect of the meaning-making informed the methodological decisions and protocol designs to ensure a variety of viewpoints

were collected and space was afforded to negotiate differences. The term reification introduced above will be useful vocabulary for describing the findings related to RQ3 when considering the ways in which the strategic text motivates change for the SAVE organization.

Strategy-as-practice

Sensemaking and meaning-making frameworks align well with understanding the development of a strategic plan for the organization, not as an isolated event, but as a complex and dynamic social phenomenon (Hendry & Seidl, 2003; Vallaster & von Wallpatch, 2018). Such an approach is described as strategy-as-practice and seeks to understand how members and partners of an organization attribute meaning to ongoing events and how their ongoing discourses shape the organization's vision, mission, and goals (Johnson et al., 2007, Vallaster & von Wallpatch, 2018). Strategy-as-practice from a research perspective views strategy as a “situated and socially accomplished flow of activity” (p. 370) and is interested in understanding the “doing of strategy; who does it, what they do; what they use and what implications this has for shaping strategy” (Jarzabkowski, 2005, p. 365). Strategy-as-practice is an approach to the study of strategizing that focuses on the process of strategy making and is useful for navigating multiple perspectives, understanding outcomes, and accounting for issues of power (Brown & Thompson, 2013).

Practice perspectives are centrally concerned with activity of all kinds, including the minute and routine (Johnson et al., 2007). An emphasis on activity and practice in social theory is a growing field of research with roots that can be traced to influential theorists such as Anthony Giddens, Pierre Bourdieu, and Michel de Certeau (Hendry & Seidl, 2003; Johnson et al., 2007). Giddens proposed that structures are the collective systems within which people carry out their daily activities. Those structures are socially produced and reproduced by normalizing

daily practices within a social context (Giddens, 1976; Johnson et al., 2007). Bourdieu challenged existing social theory that held to the notion that social life could be understood as applying a set of rules. Bourdieu argued for the study of everyday life and evaluating abstract rules or structures through individuals' actions (Bourdieu, 1977). De Certeau emphasized attention to the ordinary in everyday life and highlighted the 'doing' of activity and 'ways of operating' (de Certeau, 1984). The practice turn in social theory initiated by the works of individuals such as Giddens, Bourdieu, and de Certeau has evolved into a variety of "as-practice" frameworks with an interest in understanding micro-activities and the broader social context that shape those activities (Johnson et al., 2007; Suddaby et al., 2013).

Three terms or concepts central to the practice tradition are praxis, practices, and practitioners (Suddaby et al., 2013; Whittington, 2006). Fenton and Langley (2016) suggest a fourth element is important when discussing practice and strategy, the strategy text. In the framework of strategy-as-practice, these terms are interrelated and hold reciprocal relationships spanning micro and macro levels of organization (Figure 2.3) (Fenton & Langley, 2011). The term praxis refers to the actual, concrete activity as it takes place such as meetings, conversations, and interactions that aid in the formulation and implementation of strategy (Fenton & Langley, 2011; Suddaby et al., 2013; Whittington, 2006). Praxis is what people "*do in the practice*" (Whittington, 2006, p. 619).

Practitioners are "strategy's actors" (p. 619), the people who do the work of making, shaping, and executing strategies (Whittington, 2006). In an organization, strategy practitioners may include executive managers whose work entails developing and implementing strategies. Outside consultants may also be called upon as advisors and to serve as strategy practitioners (Whittington, 1996, 2006). Strategy-as-practice research raises questions of who is a strategist,

who shapes the construction of strategy for an organization, and how do individuals identify themselves in relation to the strategic activity (Cornelissen & Schildt, 2020; Jarzabkowski, 2005).

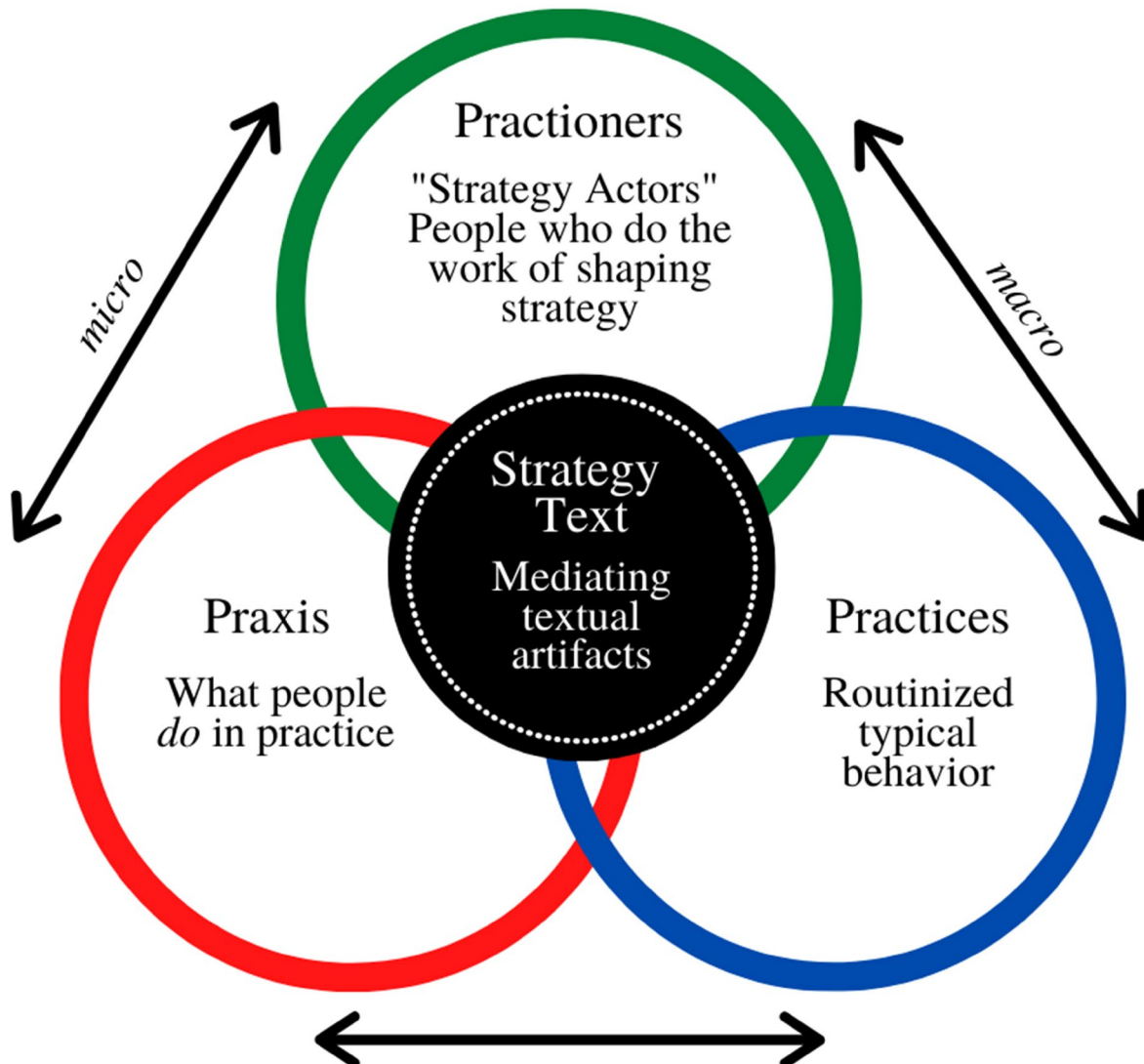
Whittington (2006) describes the third aspect, practices, as the “shared routines or behavior, including traditions, norms and procedures for thinking and acting” (p. 619). As routinized types of behavior, practices extend beyond individuals and time (Suddaby et al., 2013). Strategy practices are what practitioners draw upon in the formal process of doing strategy (Jarzabkowski, 2005). Practice research is interested in examining the role of practices in shaping strategy as a situated and socially accomplished flow of activity (Jarzabkowski, 2005).

The fourth element, the strategy text, reflects the mediating role of textual artifacts such as strategic plans in strategizing activities (Fenton & Langley, 2016). In line with the attention placed on material artifacts emphasized by de Certeau (1984), strategy-as-practice researchers are interested in not only the way strategy texts are formed, but how they are understood and used by the organization. In the interrelated and perhaps dependent, relationship between text and practitioners, the strategy text has no apparent meaning apart from human interaction (Koschmann, 2012; Mailhot et al., 2016). As described by Fenton and Langley (2016), “once strategy texts are unleashed into a wider forum, they become objects to be consumed” (p. 1183). How then are the strategy texts consumed and by whom? Understanding these texts' role in inspiring commitment to the organization, motivating change, or legitimizing prior decisions may be an opportunity to advance the strategy-as-practice research agenda for an organization such as SAVE. These tenants of the role of the strategic text will be key for addressing RQ3 and connecting the findings to the strategy-as-practice framework.

Practice-oriented research may not combine or give equal weight to these elements, praxis, practitioners, practice, and perhaps strategy text, but understanding their interconnectedness provides a means for understanding strategy practice (Fenton & Langley, 2016; Whittington, 2006). Viewed collectively, strategy-as-practice research is interested in understanding how the micro everyday activities (praxis) and the macro routines (practices) are used by practitioners in strategy making to inform the textual artifacts produced by the strategizing activity (Fenton & Langley, 2016; Jarzabkowski, 2005; Whittington, 2006). These four elements of practice-oriented research and their relationship to each other will provide the vocabulary to describe how participants negotiate their role in the construction of strategy for the SAVE organization (RQ2).

Figure 2.3.

Interrelated and Reciprocal Relationship of Practitioners, Practices, Praxis and Strategy Texts



If strategy-as-practice seeks to understand the ongoing, complex, dynamic, and social process of strategy making from a practice perspective, how can researchers draw meaningful boundaries around an incident of strategizing to study? Social systems theorist, Niklas Luhmann (1995), offered the concept of an ‘episode’ as a tool to isolate such incidences. Hendry and Seidl (2003) further developed Luhmann’s concept to apply to strategic planning. An episode, as described by Luhmann, is a sequence of events with a beginning and an ending, marked by the

suspension of normal routine structures of discourse and hierarchy so alternative forms of communication and reflexivity may be explored (Hendry & Seidl, 2003; Johnson et al., 2007; Luhmann, 1995). Examples of strategic episodes are meetings, facilitated off-site workshops, and retreats (Hendry & Seidl, 2003; Hodkinson et al., 2006, Rouleau, 2013). The practice of taking time out from the day-to-day operations to discuss longer-term plans and directions is not only common; it can be an important part of a formal strategic planning process. Strategic episodes such as workshops provide a “time out when threads of strategy development, likely to be disparate and uncoordinated through the organization, may be disentangled and made sense of” (Hodkinson et al., 2006, p. 488).

Furthermore, they provide an occasion “when the experience of those attending provides the basis for reconciliation of different views” (Hodkinson et al., 2006, p. 488). Sandberg and Tsoukas (2020) refer to this type of momentary set aside of an organization’s daily routine as intended distancing or detached-deliberate sensemaking, where participants deliberately disrupt their regular activities, step back, and attempt to observe their organization from the outside. Strategizing episodes create temporary separations of sense and action and provide space for reflection on the organization's strengths and weaknesses (Sandberg & Tsoukas, 2020).

Luhmann’s definition of an episode includes a beginning and an end. A clear switch of context can mark the initiation of a strategic episode. A change in context is necessary for a change in cognition. In the absence of a change in context, “operational routines will simply reproduce themselves, and communications will remain locked in the operational realm” (Hendry & Seidl, 2003, p. 189). The end of an episode can take two forms, either goal-oriented or time-limited. Goal-oriented episodes focus on communications to achieve a specific goal. Time-limited episodes are marked to end by a set time and date (Hendry & Seidl, 2003). The two

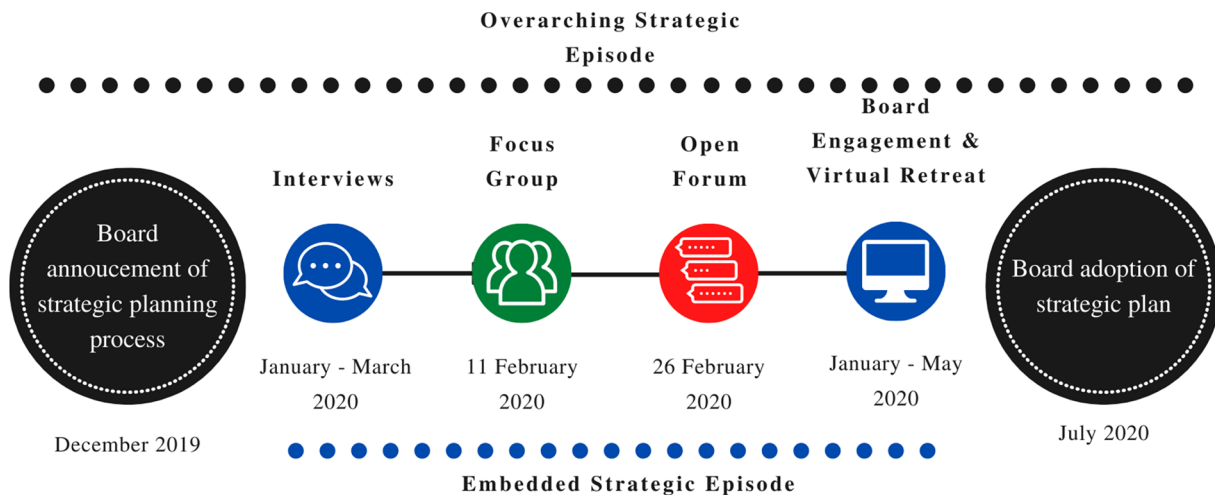
forms are often combined, as is the case with the SAVE strategic planning process. The focus of the episode is the achievement of a specific goal (the development of a strategic plan) on a time limit (requested delivery by summer 2020).

The SAVE strategic planning process can be viewed as a larger strategic episode with embedded smaller episodes, where of these smaller episodes, as well as the overarching process were marked by their own beginning and goal-oriented or time-limited ending (Figure 2.4). The overarching episode was initiated with an announcement at a board meeting that SAVE was collaborating with K-State in the development of a strategic plan. This broader episode concluded with the board adoption of a written strategic plan. Embedded within the larger episode are several smaller strategic episodes including interviews, a focus group, open forum, facilitated discussions with the board, and a virtual retreat. Viewing each of these facilitated data collection opportunities as strategic episodes creates a unit of measure and draws meaningful boundaries around each incident to study in the context of the ongoing and complex strategy-making process.

Figure 2.4.

Overarching Strategic Episode and Embedded Smaller Episodes Comprising the SAVE

Strategic Planning Process



Mezias et al. (2001) suggest an important essential part of transitioning into a strategic episode is an external facilitator's involvement. Facilitators help create ground rules and design activities for productive conversation. While the facilitator cannot decouple the strategic episode from normal structures and operations of the organization, only the organization can accomplish this, “they can assist the self-organizing process of the episode, helping to establish temporary routines that are suited to the purpose of strategic reflection” (Hendry & Seidl, 2003, p. 190). For the SAVE organization, the researcher also held the role of facilitator and worked to determine the arrangements that might maximize the possibility of generating reflexive strategic discourse and finding ways to feed any productive outcomes back into the organization.

Strategy-as-practice holds many commonalities with the leadership framework leadership-as-practice. Approaching leadership studies and research from this practice perspective requires a focus on activity, constructionist, and “inherently, relational and collective” (Carroll, Levy, & Richmond, 2008, p. 366). Evaluating leadership from a practice

perspective means shifting attention from the intentions and actions of a few during key moments in time to the everyday experiences and relationships of all participants (Carroll, et al., 2008; Cunliffe & Eriksen, 2011; Schall et al., 2004; Raelin, 2011). Leadership-as-practice emphasizes social interactions and maintains that meaning is found through day-to-day dialogue and continual reflection on those human exchanges (Raelin, 2011, 2016, 2017). Through this lens, leadership is not the isolated activity of an individual, but a relational process co-created by people interacting in a social context (Fairhurst & Uhl-Bien, 2012). Similar to this leadership framework, strategy-as-practice focuses on ordinary strategic practitioners' unheroic work in their day-to-day routines (Whittington, 1996). This practice perspective views strategy as socially accomplished and “requires attention to the intentions and interests of the multiple actors involved in defining what activity constitutes value for an organization and how this shifts over time” (Jarzabkowski, 2005, p. 368).

Strategy-as-practice research has largely ignored military organizations, concentrating instead on private organizations and public administration (Westling et al., 2016). Applying a practice perspective to the strategic planning of SAVE, a veteran service organization whose board is comprised by many high-ranking retired military officials, may broaden our understanding of the actual strategic and sensemaking processes of these types of organizations and improve the practices behind formulating their strategies.

Summary

This chapter opened with a brief description of the SAVE organization history, followed by a summary of the relevant literature related to military veteran behavioral health, military veteran agricultural training programs, and behavioral health interventions. A brief literature review related to nonprofit and military strategic planning was included to establish context for

the strategic planning work of the SAVE organization, given that they are both a nonprofit organization and heavily comprised of military veteran members. This chapter also included a description and literature review of the theoretical frameworks informing this research.

Exploring the conceptual and theoretical frameworks demonstrates knowledge of the field of study and provides the vocabulary and structure necessary for connecting the theory to findings in Chapter 5. The literature review included in this chapter provides background and helpful context for understanding the SAVE organization and perspective for considering the process observed during the development of SAVE's strategic plan.

Chapter 3 - Methodology

Since SAVE's founding in 2015, the organization has experienced growth and successes, as well as challenges. The SAVE board and Chief Executive Officer (CEO) recently identified a need for a strategic plan for the organization, as well as a comprehensive marketing and outreach plan. I was invited, along with a strategic marketing agency, to design a participatory process to collect information from relevant stakeholders to inform strategic planning documents. Through this research I aimed to understand the individual and collective experiences and roles of members and partners of the SAVE organization. In addition, I evaluated the possibilities for engaging leadership communication processes to facilitate organization change.

Research Purpose and Questions

The purpose of this study was to explore the successes and challenges of the SAVE organization through an Appreciative Inquiry (AI) process to inform the organization's future priorities and direction. Exploring the following research questions helped advance understanding, as well as the limited literature related to practice-based organization studies for military and veteran service organizations.

Four research questions guided this study and reflected a commitment to community-engaged scholarship, highlighted the practical implications of this study, and addressed a gap in organization management literature.

1. What are the possibilities for engaging leadership communication processes such as appreciative inquiry in facilitating organization change?
2. How do participants negotiate their role in the construction of the strategy for the organization?
3. How does the strategic text inspire commitment to the organization and motivate change?

4. What tensions emerge as participants engage in the participatory process to develop the organization's strategic plan?

Rationale for Qualitative Study

Qualitative approaches “seek to preserve the form and content of human behavior and to analyze its qualities, rather than subject it to mathematical or other formal transformations” (Lindlof, 1995, p. 21). Qualitative approaches are appropriate for research questions that seek to understand the complex, context-driven, and uncertain human condition. Where quantitative approaches seek generalizable results and stable, predictable outcomes, qualitative research “acknowledges that human concerns cannot be understood by testable observation” (Kim, 2016, p. 4). In the words of the French microbiologist René Dubos, “sometimes the more measurable drives out the more important” (Siegel, 1986, p. 20). A qualitative approach was particularly useful to this research, where the inquiry was focused on the process of discovery and descriptions of the nature of the experience (Reed, 2011).

Referring back to the research framework described in Chapter 1, the foundation of this research was built on the ontological assumption that the world is comprised of human beings, each of whom have their own unique thoughts, interpretations, and meanings of the world around them. This study assumed a social constructionist epistemology which aligns with a qualitative approach that understands that people construct meaning and their knowledge and understanding through interactions with the world around them (Bhattacharya, 2017). In this study, interpretivism served as an overarching theoretical framework, viewing reality as socially constructed and built on the basic assumption that we are social beings and that we come to know and understand who we are and the world around us through our environment and our communities (Uhl-Bien & Ospina, 2012; Wenger, 1998). A social constructionist epistemology

and interpretivist theoretical framework places this study in a post-positivist to post-modernist paradigm. Such a paradigmatic stance rejects the notion that a single objective truth exists, instead multiple realities may exist and those realities are dependent on the meaning created with humans in relation to each other (Uhl-Bien & Ospina, 2012).

For this study, qualitative research allowed for the observation and inquiry into the experiences of the members and partners of SAVE in the context of their day-to-day lives. This kind of inquiry provided the opportunity to explore participants' meaning-making process as individuals and in interaction with others. Johnson et al. (2007), suggests that in-depth and qualitative data are at the core of strategy-as-practice research and important for understanding the day-to-day work of organization members. Researching strategy practice demands an approach that can capture the “dynamic, complex” phenomenon “involving intense human interaction” (Johnson et al., 2007, p. 52). Qualitative approaches provided the opportunity to observe such a phenomenon, witnessing the in-the-moment experiences of doing strategy and understanding the interpretations members of the organization place on these activities. The amount and degree of attention to the elements of organization life afforded through qualitative inquiry resulted in a level of detail of situated work practices, which less engaged research approaches might miss (Sutherland, 2016).

Qualitative research can be conducted through a variety of methodologies (Bhattacharya, 2017). For the purpose of this study, ethnography and AI were selected as the preferred qualitative approaches. Qualitative data collected throughout the collaboration in the form of interviews, focus group, observations, and open forum helped to inform the design of a virtual retreat. These initial ethnographic methods helped to develop a “rich understanding of the communicative context and cultural practices” (p. 65) used by members, partners, and

stakeholders of the SAVE organization, all of which was useful in preparation for the facilitated retreat (Hartwig, 2014). While serving as a board member provided some level of understanding of the inner workings of the organization, engaging with participants one-on-one during interviews, in smaller conversations through the focus group, and through observations of board meetings and member interactions, I gained a deeper appreciation for the way members negotiate meaning and organize themselves as a group (Strycharz-Bañas, 2016).

The overall process from interviews to the virtual retreat produced data that lent itself well to a qualitative analysis. All data sources were first pre-coded manually using a highlighter to identify significant or noteworthy passages and a pen to jot notes or ideas. Following the manual pre-coding phase, all files were organized in NVivo, a qualitative analysis software tool, and examined using a two-step coding process (Miles et al., 2020, Saldaña, 2016). The first cycle included an evaluation coding method and was applied to all data with the exception of archival materials and board meeting minutes. The evaluation coding method selected for this analysis was eclectic and included magnitude coding to identify positive versus negative feedback, descriptive coding to note the topic, In Vivo coding to highlight an exemplary quote from the text, and a recommendation (REC) tag to denote potential future actions to address the feedback (Saldaña, 2016). Board meeting minutes and archival materials were analyzed as the first cycle via a descriptive coding method. Descriptive coding can be useful in assessing longitudinal change among the organization's participants, board members, and stakeholders (Miles et al., 2020). The second cycle coding for all data followed a pattern coding method where initial codes were examined for similarities or overlap and collapsed into broader categories or metacodes (Saldaña, 2016).

This research and approach presented a few methodological challenges. Those methodological challenges included the balance of maintaining transparency while upholding confidentiality and being vulnerable as a researcher. Practicing self-reflection and adhering to the established protocols and commitments made in the application to the Committee on Research Involving Human Subjects/Institutional Review Board (IRB) helped in navigating these methodological challenges.

A qualitative approach was deemed as the most appropriate research methodology given my theoretical and conceptual commitments to understanding the lived experiences of the SAVE members and stakeholders (Connaughton et al., 2017). The questions I sought to answer were exploratory and process based; questions best answered through qualitative methods.

Methodological Framework

A social constructionist framework influenced the approach to this research and the development of the research questions. Related to this framework, three complimentary theoretical perspectives informed this research— interpretivism, sensemaking and meaning-making in a community of practice, and strategy-as-practice. At the heart of each of these frameworks and perspectives is the understanding that knowledge is co-constructed in context and relationships with others. Relevant to the understanding of the SAVE organization, this research approach sought to discover how SAVE’s current reality and desired future of the organization are co-created through the interactions and relationships of participants. Blending principles from ethnography and AI, the methodological framework for this research sought opportunities for observing and engaging with participants through participatory and collaborative activities.

Ethnographic approach

Ethnography provides the opportunity to observe social interactions in the context of their culture and witness the process of meaning-making as situated in everyday life (Bhattacharya, 2017; Raelin, 2019; Sutherland, 2016). Through this approach, the researcher has the opportunity to participate openly in people's lives (Hammersley & Atkinson, 2007). Gioia and Chittipeddi (1991) suggest that understanding organization meaning-making necessitates the researcher be grounded in the organization's culture and involved with the individuals experiencing the strategic change effort, thus suggesting an ethnographic approach. Holding the dual roles as a member of the SAVE board and graduate student, this researcher had the opportunity to work side-by-side with the participants as a learner (Raelin, 2019). From a data collection standpoint, holding this dual role meant that at times an ethnographic approach informed data collection (i.e. – interviews, focus groups, and open forums) while at other times the embeddedness of the researcher moved the data collection into an ethnography realm. For example, access to historical documents and the type of correspondence reserved for members of the SAVE board or leadership blurs the boundaries between researcher and an active member of the organization, warranting an ethnographic frame.

From a strategy-as-practice approach, ethnography was appropriate because it seeks to understand “the rational, taken-for-granted character of everyday life” or the “procedures that people use to develop sensible and orderly ways of doing things” (Lindlof & Taylor, 2019, p. 56). As described by Ellingson (2009), a “deep understanding of the daily life is uniquely accessible through ethnography” (p. 5). Since this research was curious to learn about the individual and collective sensemaking process of the SAVE participants and organization, ethnography was an appropriate methodology because it focuses on *how* meaning is locally

constructed, often through conversational practices (Gillece, 2016). Participants in this setting create meaning in the context, always in a process, and thus continuously define the interaction themselves (Lindlof & Taylor, 2019). Applying an ethnographic approach to the development of a strategic plan for SAVE, every step of the process and protocols were designed to encourage participation and dialogue and provide the opportunity to observe how conversations and observations unfold (Sutherland, 2016).

Appreciative inquiry

Appreciative Inquiry (AI) is an approach to organization change based on the premise that questions and dialogue about strengths, successes, values, hopes, and aspirations are themselves transformational (Whitney & Trosten-Bloom, 2010). AI is commonly viewed as an organization development strategy, method, or technique, but also has application as a research methodology (Reed, 2011). Similar to ethnography where discovery is situated within everyday life, AI is a means of inquiry “described as a way of living with, being with, and directly participating in the varieties of organizations we are compelled to study” (Cooperrider, 1986, p. 17). So while AI may be best known as an intervention strategy, it is an appropriate ethnographic research method for studies such as this where the researcher is seeking “a stance for inquiry, a way of joining with others to explore the world” (Schall et al., 2004, p. 2).

AI is a participatory and collaborative approach to inquiry that seeks what is right about an organization in order to create change and a desired future (Preskill & Coghlan, 2003). Interviews, focus groups, open forums, and facilitated discussions with board members are the type of participatory and collaborative activities and data sources called for in an AI approach. As AI makes extensive use of storytelling as a discovery method, each of the proposed data sources for this study created open-ended opportunities for personal narrative (Michael, 2005).

As described by Preskill and Coghlan (2003), the power of AI is the way it calls upon participants to focus on their own personal experiences. Connecting personal experiences to an organization's strengths increases engagement and illuminates opportunities to co-create the organization's future.

Appreciative Inquiry as a process is often described as a "4-D" cycle, including four phases: Discovery, Dream, Design, and Destiny (Figure 3.1) (Bushe & Kassam, 2005; Cooperrider et al., 2008; Cooperrider & Whitney, 2006). In the Discovery phase, individuals engage in dialogue to uncover the life-giving forces of an organization. When is the organization at its best? What makes the organization unique and exceptional? Sharing individual reflections to these questions through dialogue with others results in a meaning-making process whereby an individual appreciation becomes a collective appreciation (Cooperrider et al., 2008; Shuayb, 2014). The Dream phase invites participants to imagine what might be for the organization. What is an ideal future for the organization? This phase builds on the discovery of the history of the organization at its best and imagines a future in which the organization lives out its true potential (Cooperrider et al., 2008; Shuayb, 2014). In the Design phase, the dream begins to transition into a workable reality by identifying the elements necessary for effective organization change. During this phase, past successes are leveraged and new ideas for the future of the organization are created (Cooperrider et al., 2008; Cooperrider & Whitney, 2006). The goal of the final phase, Destiny, is to ensure that the dream can be fully realized and sustained. Actions, built on a collective appreciation, move the organization closer and closer to its ideal. To be truly sustaining, appreciative learning becomes part of the culture of the organization. The organization continues to focus on the positive, life-giving moments, and encourage collaborative innovation towards an ideal future (Bushe & Kassam, 2005; Cooperrider et al.,

2008). Data collected for the purpose of the larger study and development of the strategic plan seek to align with all four phases of the AI 4-D Cycle. Data collected through interviews, a focus group, an open forum, and a visioning activity with the board align best with the Discovery, Dream, and Design phases. A goal of the virtual retreat with the SAVE board was to engage participants in all four AI phases with a focus on building on the Design phase and initiating the Destiny phase.

Figure 3.1.

Appreciative Inquiry 4-D Cycle



The discussion above illustrates the aspects of AI that made it a fitting research methodology for this study. The following sections provides an outline of the research design, data collection, data management, and data analysis.

Research Design

Participant selection

Participants were identified through a process of network sampling. Initially, potential subjects were identified through conversations with SAVE organization and board leadership, as well as a partnering media company. Initial subjects included former SAVE student and program participants, organization volunteers, and individuals from partnering organizations. Additional subjects were also identified through a snowball process based on feedback from participants. For example, one former student included on the initial interview list recommended meeting with another former student with a unique and additive perspective about SAVE. This process ensured a diversity of voices and perspectives related to SAVE's organization history and success were engaged and included in the strategic planning process. Pseudonyms have been assigned to all participants.

Research site

SAVE is a non-profit organization founded in 2015 for the purpose of providing agricultural training and behavioral health interventions for transitioning military servicemembers and veterans. A Chief Executive Officer (CEO) is responsible for the administration of the organization. Two unpaid staff, an Executive Vice President and Secretary of the Board, as well as one paid administrative assistant, support the CEO position. A 13-member board meets monthly to review the organization's finances and provide advice on programming and other activities. Many functions of the organization such as grant writing, marketing and outreach, and accounting are provided through volunteers from collaborating organizations. A beekeeping supply and honey production business, Golden Prairie Honey Farm, is a part of the SAVE organization. All proceeds from the sales of beekeeping supplies and honey support SAVE's agricultural training programs, as well as the wages for three to four beekeeping employees and interns. Operations and training for both SAVE and the Golden

Prairie Honey Farm occur across three primary locations, a business office located in downtown Manhattan, KS, a woodshop and storefront located in eastern Manhattan, KS, and a 320-acre farm located near Riley, KS.

Membership role

In this section, I describe my membership role with participants and within the research site. Ethnographic researchers often hold the role of observer-as-participant where the “researcher behaves as much like a real member of a group as possible, but members are aware of being observed.” (Ellingson, 2012, p. 18). At times, the researcher may step back to serve as an observer, while at other times the researcher may be fully engaged as a participant. As described by Cheney (2008), community-engaged research and the co-creation of knowledge has a “leveling effect on relationships between researchers and what might otherwise be called participants” (p. 286). Participating through these various, and sometimes nuanced, roles over time provided a unique opportunity to gain insights into the SAVE organization in their natural context (Ellingson, 2012).

As a member of the SAVE board since 2016, I am an insider to the community of participants and share a common social understanding of the organization. As a board member, I have unique access to not only fellow members of the organization, but also to documentation and historical knowledge. As a student, I have been invited to design a participatory process that collects information from relevant stakeholders to inform strategic planning documents. Engaging in this study in the integrated role as both a researcher and member of the SAVE organization will be contextualized and situated in a constructionist frame more fully in the Trustworthiness and Rigor section. An exploration of these potential implications are described more fully in the Trustworthiness and Rigor section of this chapter.

My engagement with the SAVE organization as a researcher also has implications for my role as a member of the organization. Through this inquiry process and co-creation of the identity and future direction of the organization, my personal convictions for serving on the board were occasionally challenged. Continuous self-reflection and careful adherence to established protocols created the space necessary to deliver the strategic plan while feeling confident that I held true to the values and perspectives communicated to me during the process.

Data Collection

Looking ahead to the next five years for SAVE, the approach for developing the strategic plan was built on the organization's successes and strengths through an AI process. Identifying when and how SAVE functions at its best informed the strategic plan for the next five years of the organization. The overall process for developing the strategic plan included a review of SAVE records and history, gathering relevant data and stakeholder/partner input, goal setting, and drafting and editing a final document.

Data gathering was accomplished through interviews, a focus group, an open forum, observations, correspondence, review of archival data, and facilitated discussions with the SAVE board. Each of these touchpoints can be described as the type of strategic episodes introduced in Chapter 2. Each of these strategic episodes are marked by a beginning and end and allow for a clear change of context, stepping away from the day-to-day work of the SAVE organization, to engage in a strategic activity (Hendry & Seidl, 2003; Luhman, 1995). Viewing each of these facilitated data collection opportunities as strategic episodes creates a unit of measure and draws meaningful boundaries around an incident to study in the context of the ongoing and complex process of strategy making.

An application to the Committee on Research Involving Human Subjects/Institutional Review Board (IRB) for Kansas State University was submitted in December 2019. A modification to the initial IRB application was submitted and approved in September 2020. The purpose of the modification was to include correspondence in the form of emails and phone calls from participants as part of the data collection. Letters indicating that the proposal and modification have been determined to be exempt from further IRB review is included in Appendix A.

Table 3.1 provides a summary of all data collected by data type, source, number of participants, and page count. Each of the data types align well with a research question that seeks to learn more about how participants describe their experiences and roles within the organization.

Table 3.1.

Data Types, Sources, Number of Participants, and Page Count

Data Type	Data Sources	Number of Participants	Page Count
Interviews	SAVE Program Participant	12	180
Focus Group	SAVE Employees and Volunteers	6	15
Open Forum	SAVE Partners and Stakeholders	12	15
Observation	SAVE Board Meeting	10	10
Vision Activity	SAVE Board Members	8	15
Virtual Retreat	SAVE Board Members and Partners	18	65
Archival Data	SAVE Board Minutes	NA	225
Correspondence	SAVE Board Members	8	40

Interviews

Interviews were conducted with 12 participants of the SAVE programs. The interview format was in-depth and open-ended with general questions developed in advance of the interviews to help guide discussion. This format allowed opportunities to dig deeper into and gain a better understanding of the participants' experiences (Bhattacharya, 2017; deMarrais &

Lapan, 2004; Shockley-Zalabak, 2017). As described by Fairhurst and Uhl-Bien (2012), interviews are a key aspect of ethnographic research and allow for “exploring issues of meaning, sensemaking, identity, and relational history” (p. 1053). Questions selected to guide the discussion reflect an appreciative inquiry approach in that they sought answers to questions such as when the SAVE organization is at its best, what makes the interviewee proud to be a part of the organization, and how do they envision an ideal future for the organization. Following an appreciative inquiry approach, questions related to weaknesses of the organization were framed as opportunities for improvement. Twelve participants were interviewed with the length of the interviews ranging from 14 minutes to 116 minutes. The average interview length was 44 minutes. Nine interviews were conducted in person and three were conducted via Zoom video conference technology. The audio for all interviews was captured with a recording device and transcribed using OTranscribe.com and NVivo Transcription depending on the format and quality of the audio recording.

Focus group

Focus groups are an interactive discussion led by a facilitator aimed at gathering a range of perspectives on a given topic (Hennick & Leavy, 2013). One focus group discussion was held with SAVE employees and volunteers. The focus group was held at the SAVE office in downtown Manhattan, KS. Participation in the focus group was voluntary and dependent on scheduling availability. Six individuals participated in the focus group. Individuals invited to participate in the focus group who were unable to attend were invited to participate in an interview as an alternative. Focus group interview questions mirrored the items used to guide the one-on-one interviews. Feedback from the focus group discussion was captured through flip

charts and notes. Audio was obtained with a recording device and transcribed using and OTranscribe.com and NVivo Transcription.

Open forum

Individuals representing organizations and companies with a history of collaborating with SAVE were identified by SAVE organization and board leadership. Invitations to participate in an open forum discussion were extended to all identified individuals. The public forum was held in a conference room at the Kansas Department of Agriculture in Manhattan, KS. The format of the open forum was designed to promote discussions around SAVE's strengths, unique service areas, and future, as well as assets participants can provide to support the future vision of the organization. Feedback from the public forum discussion was captured through an online polling tool, flip charts, and notes.

Observations

Observations are a form of qualitative data collection in which the researcher collects information, often in the form of field notes, by being present at a particular event or interaction (Bhattacharya, 2017). While collecting the observations of SAVE Board meetings, this researcher was an active, full member of the meeting, at times providing reports and input while at other times observing the interactions from the periphery. At all times, other members of the SAVE Board and participants in the meeting were fully aware of the researcher's presence, intent, and role. Field notes included summaries of the presentations and discussion, along with, sketches and observations of Board member interaction, body language, and tone. Beginning in May 2020, due to the coronavirus pandemic, board meetings were conducted electronically via Zoom videoconference technology. Observations were still collected through field notes for each monthly board meeting. Throughout the development of the strategic plan, members of the

Board shared additional input via email and phone calls. Feedback shared through this correspondence provided useful insight to address the research questions.

Visioning activity with board members

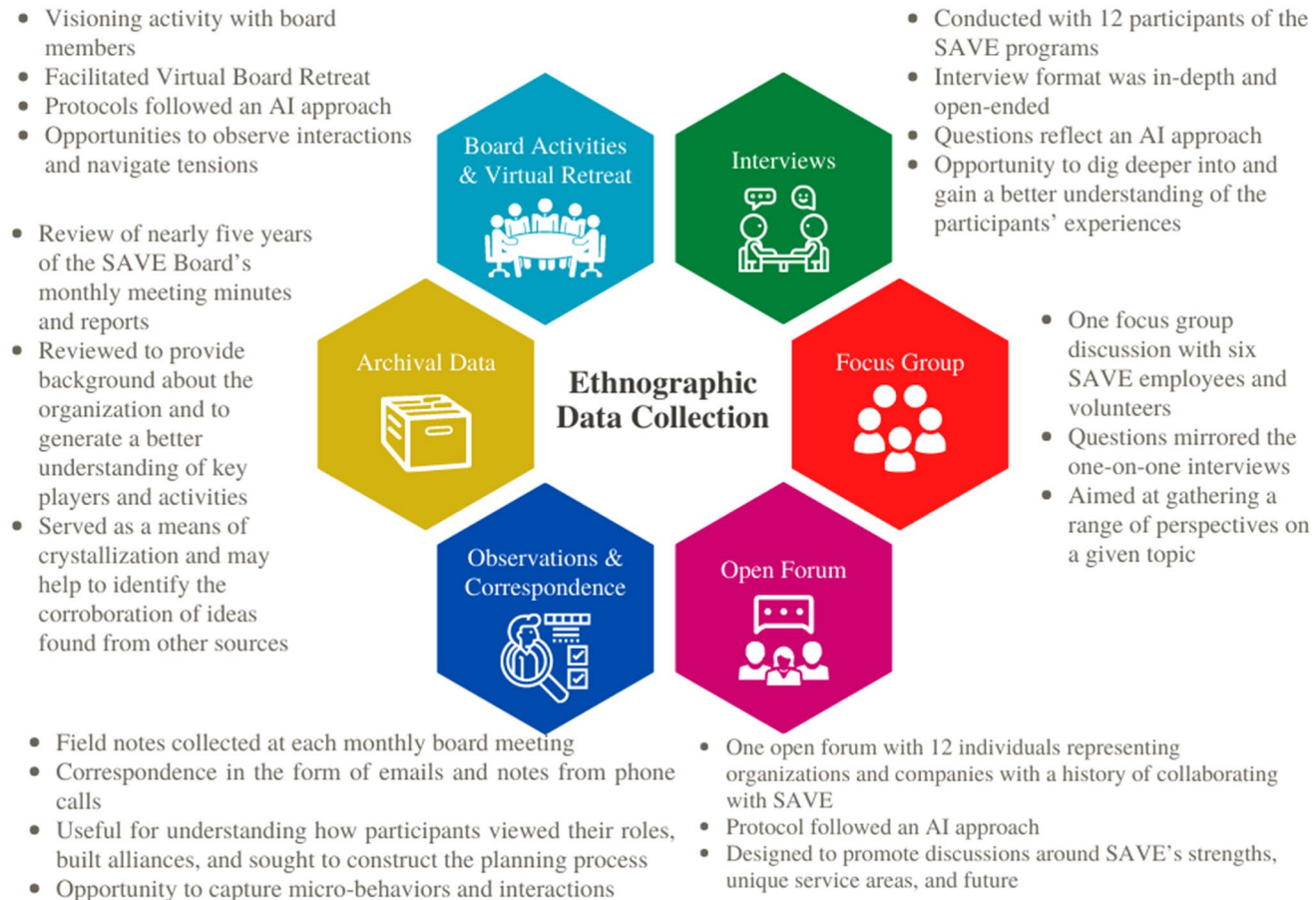
Visioning, as part of strategic planning, allows members of an organization to describe an idealized future state (O'Connell, Hickerson, & Pillutla, 2011). Three weeks before a regularly scheduled SAVE board meeting, members of the board were invited to write a statement describing their future vision of the organization. As an agenda item on the board meeting, common themes from the submitted visioning statements were shared, and participants were invited to provide their reflections and observations. As an agenda item on the following month's board meeting, a summary of the process and findings was presented to members of the board via Zoom video conference technology. Board members were invited to ask questions and share feedback during the call. A virtual retreat with members of the board was held in May 2020. Activities during the retreat engaged participants in dialogue about opportunities and losses, the desired future for the organization, and small and bold changes necessary to achieve that desired future.

Documents and archived materials

Documents and archived materials help to provide the researcher better contextual understanding (Bhattacharya, 2017). The use of documents in combination with other sources of data may serve as a means of crystallization and may help to identify the corroboration of ideas found from other sources (Tracy, 2010). A review of six years and three months of the SAVE Board's monthly meeting minutes were reviewed to provide background about the organization and to generate a better understanding of key players and activities.

Figure 3.2.

Ethnographic Data Collection Map



Strategic Planning Process Objective:
 Facilitate an inclusive, transparent, and well-informed process to gather input and feedback for the SAVE strategic plan

Data Management and Data Analysis

Data management

Data management is the process of managing the volumes of data collected and the process through which the data is chunked into manageable units. For this study, data management included the organization of both hardcopy and electronic formats. Printed copies of meeting minutes, field notes, and transcriptions were maintained in a three-ring binder to make reading and pre-coding easier. Handwritten field notes, journaling, and personal reflections were captured in a composition notebook. The binder and composition notebook were maintained at the home of the researcher and never made available for external viewing.

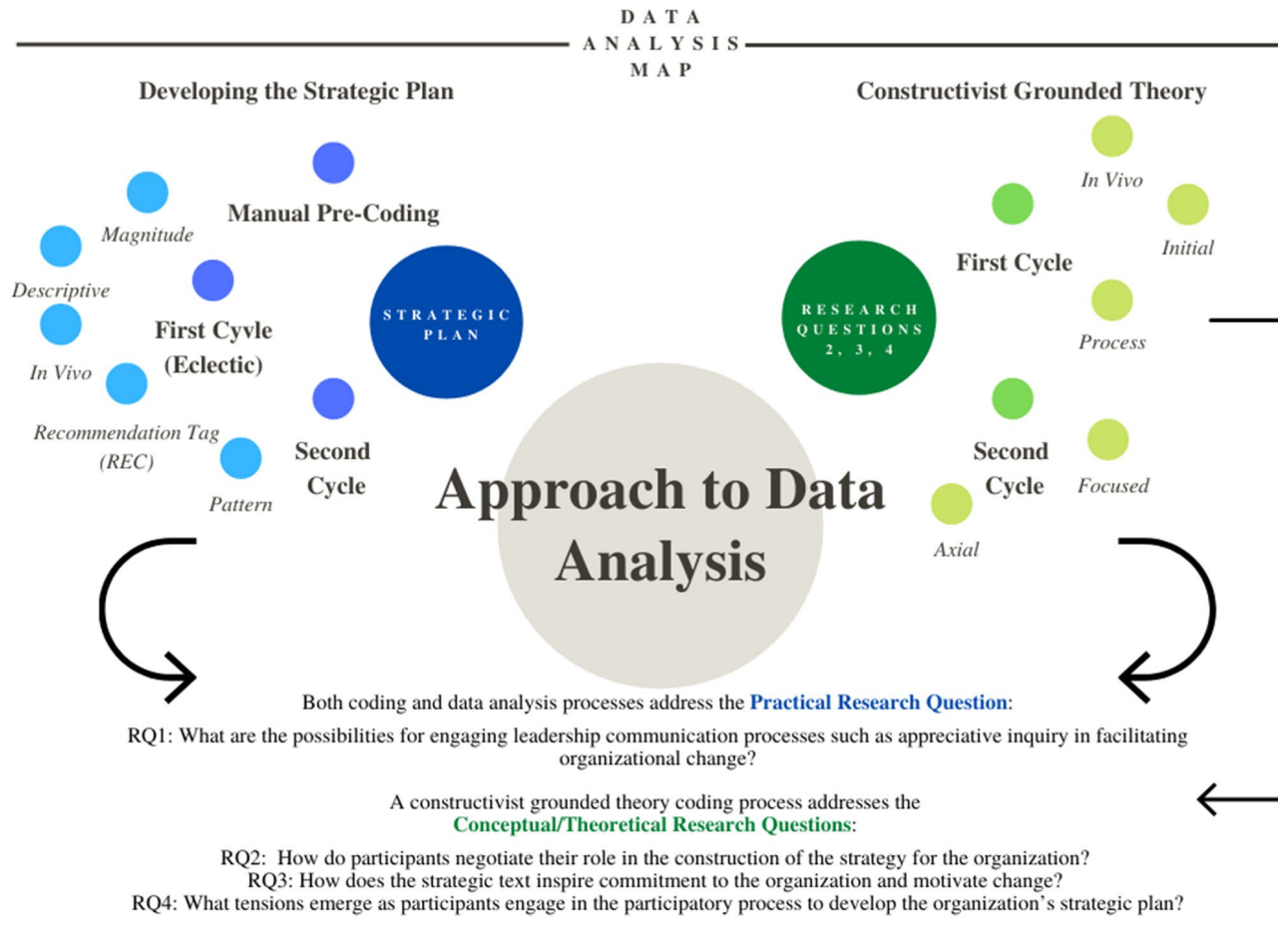
Electronic copies of data including personal identifying information such as interview transcriptions and audio recordings were maintained on a password-protected network drive. Electronic copies of other data such as meeting minutes and other archival documentation were stored on a non-password protected external hard drive. All electronic forms of data were organized in an NVivo project by file classification (audio, field notes, minutes, transcriptions, etc.) to facilitate first and second cycle coding and analysis. The NVivo project file was stored on a password-protected network drive. When sharing data with partners such as the strategic marketing firm and the third-party grant evaluator, identifiable details that were not already publicly available were anonymized.

Data analysis

All electronic forms of data were organized in NVivo, a qualitative analysis software tool, to facilitate coding and analysis (Version 12, QSR International, 2018). All data were coded and analyzed twice, once for the drafting of SAVE's strategic plan and a second time for evaluating theoretical concepts that emerged from the initial analysis.

Figure 3.3.

Approach to Data Analysis

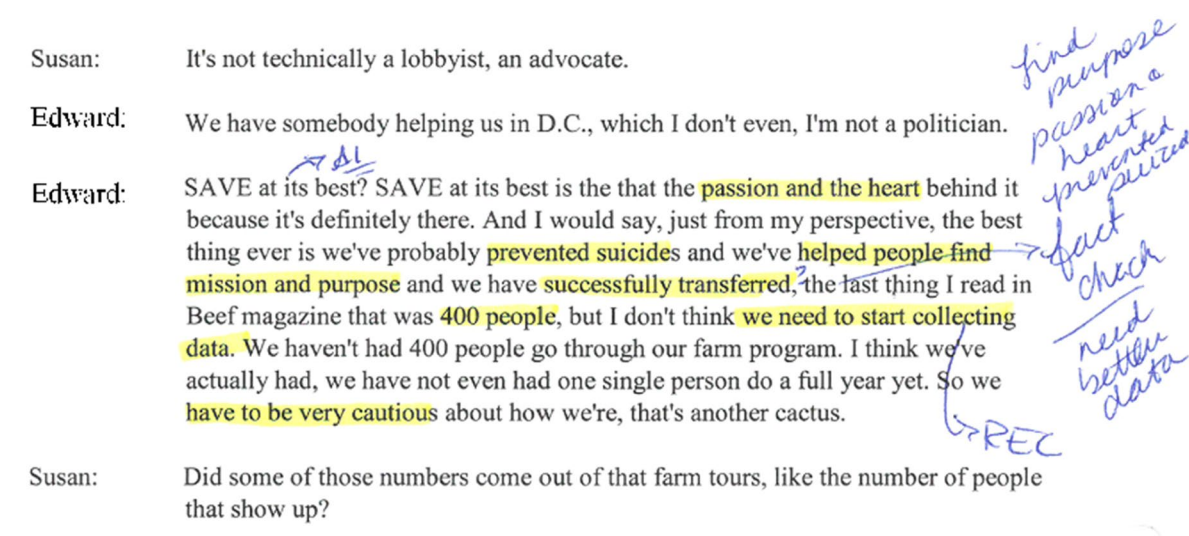


Development of strategic plan

All data sources were first pre-coded manually using a highlighter to identify significant or noteworthy passages and a pen to jot notes or ideas (Figure 3.4). Following the manual pre-coding phase, all files were examined in NVivo using a two-step coding process as described below (Miles et al., 2020; Saldaña, 2016).

Figure 3.4.

Manual Pre-coding of Interview Transcript

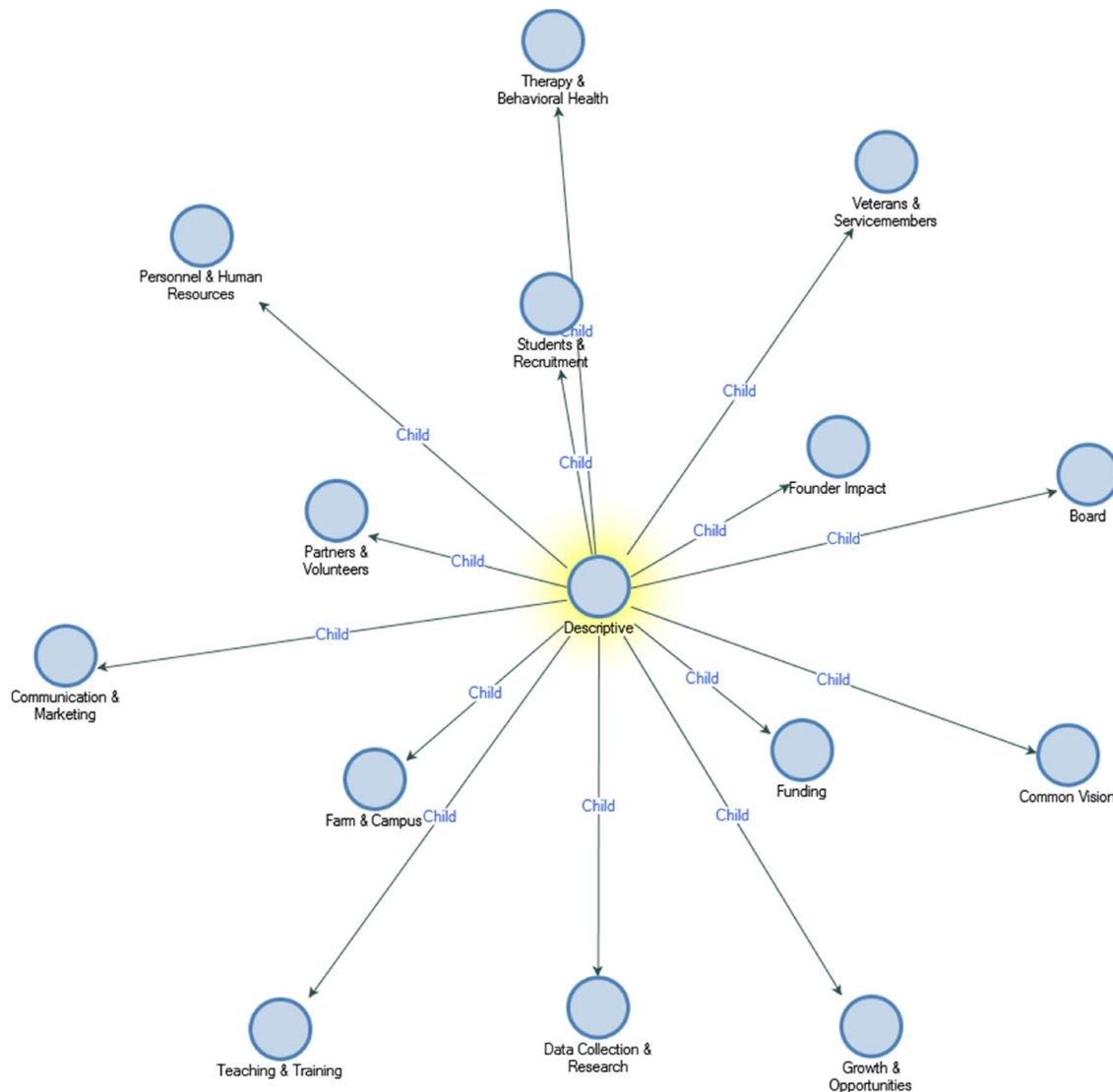


First cycle analysis of transcriptions and field notes from the interviews, focus group, open forum, and board meetings followed an eclectic evaluation coding method. The eclectic coding included a magnitude code to identify positive versus negative feedback, descriptive coding to note the topic, In Vivo coding to highlight an exemplary quote from the text, and a recommendation (REC) tag to denote potential future actions to address the feedback (Saldaña, 2016). The second cycle coding for all data followed a pattern coding method where initial codes were examined for similarities or overlap and collapsed into broader categories or metacodes

(Saldaña, 2016). Following is an Explore Diagram generated in NVivo illustrating the results of the pattern coding of the initial descriptive codes (Figure 3.5).

Figure 3.5.

Explore Diagram Generated in NVivo Illustrating the Results of the Pattern Coding of the Initial Descriptive Codes



Fifteen broad categories or descriptive themes were generated from this round of data analysis: board, common vision, communication and marketing, data collection and research, farm and campus, founder impact, funding, growth and opportunities, partners and volunteers,

personnel and human resources, students and recruitment, teaching and training, therapy and behavioral health, veterans and servicemembers, and developing strategic plan. This round of analysis and coding was completed prior to the facilitation of a virtual board retreat and helped inform the retreat activities. In this way, employing ethnographic methods such as interviews and the process of analysis helped to deepen the understanding of SAVE's communicative context and cultural practices in preparation for the facilitation program (Hartwig, 2014). Following the facilitation, transcripts and other data generated from the retreat were evaluated for the themes to inform the writing of the strategic plan.

Constructivist grounded theory

The two-step coding process described above provided the appropriate structure to identify key issues and recommendations for the drafting of SAVE's strategic plan. After the development of the strategic plan, the data sources were reevaluated following a two-step coding cycle common to grounded theory approaches. While grounded theory relies on simultaneous data collection and analysis and inductive reasoning for the production of new theories (Corbin & Strauss, 2008; Glaser, 1965), analysis of the data for this study was conducted after the majority of the data was collected for evaluating theoretical concepts that emerged from the initial analysis. The approach for the second round of data analysis is in line with Constructivist Grounded Theory and builds on the researcher's prior knowledge and disciplinary perspectives to seek new interpretations as they investigate their data (Charmaz, 2012). This iterative approach, returning to the same sources of data after drafting the strategic plan, provided the opportunity to investigate thoughtfully the emerging ideas while exploring existing literature throughout the process (Huffman & Tracy, 2018).

A constructivist approach to the data analysis may appear to conflict with the social constructionist methodological framework. A constructivist approach looks at the individual to understand socially emerging meaning. Related, but a slightly different conceptualization, a constructionist approach looks at a group process and how intersubjective meaning is created through relationship between people (Mohammad & Rob, 2018; Uhl-Bien & Ospina, 2012). For this study, the data analysis was conducted by a single individual, the researcher. Meaning, in the form of findings and interpretations, are built on the researcher's prior knowledge and disciplinary perspectives (Charmaz, 2012). The broader methodological framework for this study held a commitment to social constructionism, believing that an understanding and knowledge of the SAVE organization is only constructed in context and relationships with others (Uhl-Bien & Ospina, 2012).

Following the recommended coding methods for grounded theory, transcripts from interviews, the focus group, and virtual retreat, as well as notes from the open forum and personal correspondence were evaluated using a two-step coding process. During the first cycle of coding, or initial coding phase, line-by-line coding generated three types of codes: In Vivo, Descriptive, and Process (Flick, 2019; Kelle, 2011; Saldaña, 2016). In Vivo codes capture the actual language of the participants (Flick, 2019; Kelle, 2011). Descriptive codes summarize in a short word or phrase the topic of the sentence (Saldaña, 2016). Process coding, or action coding, uses gerunds (-ing words) to capture an observable activity (Figure 3.6) (Saldaña, 2016).

Figure 3.6.

Example of Descriptive and Process Codes Generated during First Cycle of Constructivist Grounded Theory Methods

Nodes

★	Name	▲	📁	Files
+	Appreciative Inquiry			13
-	Constructivist Grounded Theory			5
	Ability to conduct credible research			1
	Aligning with Gov task force			1
	Balancing doubt with hope			1
	Being credible - with sufficient number of students			1
	Better follow up with students			1
	Better recognition of volunteers and donor			1
	Building our presence			1
	Caring for and wanting to do more			1
	Confusion about GI Bill			1
	Cost being a drawback			1
	Caring for and wanting to do more			1
	Confusion about GI Bill			1

During the second cycle of coding, or selective coding phase, codes generated from the initial phase were grouped, categorized, and compared to each other to prepare for focused coding (Flick, 2019). During focused coding, the most frequently occurring initial codes were identified and then compared across the data sources to see how that code may appear, or not appear, in other sources (Figure 3.7) (Charmaz, 2012).

Figure 3.7.

Focused Coding Step during Constructivist Grounded Theory Approach

Nodes






Name	Files
Appreciative Inquiry	13
Constructivist Grounded Theory	5
Ability to conduct credible research	1
Aligning with Gov task force	1
Axial Tension Conflict and Mutual Engagement	4
Axial Tension Top Down to Inclusive Planning	4
Axial Tensions Relationship Practitioners and Strategic Objects	5
Balancing doubt with hope	1
Feeling best when training	1
Focused Avoiding Risk	3
CEO is a risk averse guy	1
Exposure to risk	1
Not quite listening to John about risks	1
Risk averse	1
Risk with new business venture	1
Risk, potential lawsuit about discrimination	1
Focused Building Partnerships	4
Focused Expanding and growth	4
Focused Fundraising	2

Finally, the technique of axial coding was employed to “strategically reassemble data” that may have been split during the initial coding process (Saldaña, 2016, p. 144). Similar to the axis and spokes on a wheel, axial coding connects categories with subcategories to demonstrate how they are related (Corbin & Strauss, 2008; Jamison, 2019). Throughout the coding process, memos were recorded to capture ideas, initial impressions, and potential connections to topics for further literature review (Figure 3.8). Memo writing is an important component of the reflexive nature of constructivist grounded theory and can serve as important references and “jumping off points” (p. 146) for further analysis (Jamison, 2019).

Figure 3.8.

Memo Writing in NVivo for Reflection

Memos

★	Name	
	Chad Interview Reflections	<p>Matthew was the first student that I interviewed. When conducting both the first and second codings (1. Coding for the development of the strategic plan and 2. Constructivist Grounded Theory), I first coded the interview from Edward, followed by Matthew. For the Constructivist approach, I intentionally selected these first two interviews to code because, to me, they reflected two very different interviews. They are different because one is with a board member/founder/therapist and the other is with a participant/student. These two interviews generated very different open/initial codes. My rationale is perhaps these two different interviews would generate a broad spectrum of potential codes and then the other interviews would fill in the spaces in between, with some connecting more to one interview or the other.</p> <p>Matthew mentioned his faith frequently throughout the interview. His responses were positive and grace-filled, even with providing critical feedback. He often mentioned the value of the connections he made through the program and identified opportunities for better connections in the future for the program. He identified some gaps in communication when describing the connection between Cloud County and the SAVE instructors. He frequently noted that more employees were need to carry the workload. At one point, he noted that Mary was unaware of a gap in connecting with Ft. Riley. He also expressed appreciation with the unique approach and student focus of the SAVE program. Similar to his own story, he noted that sometimes life gets in the way and students are unable to complete the full program.</p> <p>One thing I overlooked in my first round of coding for the development of the strategic plan was the exchange between me and Matthew towards the end of the interview. He wanted to know my thoughts on the priorities and asked for updates on hiring strategies. As the person conducting the interviews, I try to not insert myself too much in the dialogue, but this represented a time when the interviewee wanted to engage and pull me in to the discussion.</p>
	Edward Interview Reflections	
	Journal	
	Matthew Interview Reflections	
	Virtual Retreat Transcription Reflections	

Reciprocity and Ethics

2012). As described by Barge et al. (2008), “the value of doing research or engaged scholarship with academic partners is that it offers some practice value to the organization – it makes work better; it addresses a key problem; or it generates new possibilities for action” (p. 247). While the SAVE organization received the deliverable outcome of a strategic plan, I hope they also found benefit in participating in a co-generative process of discovering their strengths and imagining their ideal future.

Central to the challenges and opportunities for community-engaged research are ethical issues and ensuring that the research brings no harm to participants (Connaughton et al., 2017; Shockley-Zalabak et al., 2017; Spaulding, 2013). To ensure an ethical approach to this research, the study was carried out in accordance with Institutional Review Board (IRB) approval (Appendix A). Participation in this study was voluntary, and those willing to participate were asked to sign informed consent forms, as shown in Appendix B. Participants in group activities were made aware that while complete confidentiality was not feasible in those settings, all personal feedback and responses was reported without identifying the source of the contributor. When reporting participant feedback in public reports, all data was anonymized to avoid specifics of individual situations being identifiable. The audio from all interviews, portions of the focus group, and some board activities was recorded. Participants were made aware of the recording and requests to pause recordings were honored.

Some participants in this study, including employees of the SAVE organization and older (over the age of 65) individuals, are considered vulnerable subjects. As part of the IRB approval process, additional procedure-specific training was completed to ensure proper and ethical treatment of the vulnerable participants. Occasionally participants would share personal stories related to mental health and suicide. These stories were shared voluntarily. No effort was made

to probe for additional details and care was exercised with participants about these sensitive topic areas.

Data Representation

As described by Miles et al. (2020), well-organized and clearly displayed data is a “major avenue to robust qualitative analysis” (p. 9). For this study, the challenge was how to synthesize and make accessible hundreds of pages of transcripts, field notes, and documentation in a way that best responds to the research questions. While interpretations are provided throughout the findings, participants’ understandings of their roles and experiences is best illustrated in their own words. For this reason, descriptions of key themes and concepts were interwoven with direct quotes from transcripts. Particular attention was paid to critical moments where both descriptions of alignment and agreement, as well as points of tension and difference were provided across participants. Sharing these perspectives through the words of the participants was used to illustrate a negotiated, meaning-making process for the organization. Where appropriate, visual forms of data representation such as tables, word clouds, charts, and infographics were used to diversify the display of findings.

Trustworthiness and Rigor

The research was conducted to understand the experiences and roles of members and partners of the SAVE organization, not to generalize findings. The term “generalizability” falls into a category Bhattacharya (2017) considers questionable as it is a term more commonly employed in quantitative research and may not be a good fit when describing qualitative research. Generalizable suggests that the findings can be isolated from any particular context or situation (Tracy, 2010). The findings from this research apply specifically to the SAVE organization and cannot be separated from context or situation. While qualitative data is not

generalized, it must still be validated as trustworthy. Tracy (2010) outlines eight criteria for high quality qualitative research including (1) worthy topic, (2) rich rigor, (3) sincerity, (4) credibility, (5) resonance, (6) significant contribution, (7) ethics, and (8) meaningful coherence. Each of these eight areas used in this study are addressed below to discuss validation procedures.

Worthy topic

Quality research addresses a topic of interest and is timely and important (AERA, 2009; Tracy, 2010). Developing a strategic plan for SAVE addresses a current priority for the organization. Exploring the use of AI through sensemaking, meaning-making, and practice perspectives provided a unique opportunity to engage these processes in facilitating change for other nonprofit veteran service organizations.

Rich rigor

Rigor can be achieved in qualitative research by building a solid theoretical framework and complimenting that framework with a variety of evidence collected through extended periods in the field (Jones et al., 2014; Tracy, 2010). Research that is deemed rich in rigor dedicates careful attention to the practice of data collection and analysis procedures (Tracy, 2010). A diversity of evidence was collected for this research including interviews, focus groups, open forums, and a review of archived materials. Data was collected across a five-month period and engaged nearly 50 participants. Twelve participants were interviewed with the length of the interviews ranging from 14 minutes to 116 minutes. Each interview was transcribed to ensure a detailed record of the interview resulting in 180 pages of transcription. Six individuals participated in the focus group and 12 participated in an open forum resulting in 70 minutes of transcribed audio from the focus group and 30 pages of transcription and field notes. Observation of board meetings and activities with the board members resulted in 25 pages of field notes and

personal written narratives by participants. A review of archival data including board meeting minutes added 140 pages of data to this research. Correspondence in the form of emails and notes from phone calls from board members resulted in approximately 40 pages of data.

Protocols for each data collection type were consistent with an AI approach and were reviewed with selected participants in advance of the data collection to ensure appropriateness of the procedures given the goals of the study.

Sincerity

Community-engaged research calls upon the researcher to interact with their research subjects in ways that traditional, positivist research does not. This level of engagement will call into question researcher subjectivity. In true community-engaged research, it is impossible for researchers to remain uninvolved (Ellingson, 2012; Warren et al., 2018). Our background, our beliefs, and who we are as individuals and in relation to our research community all play a role in how we approach our research and understand the outcomes. To remove these subjectivities would be impossible. As described by Peshkin (1988), “one’s subjectivity is like a garment that cannot be removed” (p. 17). Because of this, “qualitative research calls for the researcher to become increasingly vigilant in order to reflect and address role of subjectivities in research with academic rigor or trustworthiness” (Bhattacharya, 2017, p. 36).

As described in detail in the Researcher Subjectivity section, the ways in which my social identity, positionality, preunderstanding of the SAVE organization, and relationship with participants were communicated and then continually explored throughout the research process. I continuously explored questions such as *Why I am engaged in the present study? What is it about me and my experience that led me to this study? What personal biases and assumptions do I bring with me to this study?* and *What is my relationship with those in the study?* Exploring these

questions allowed me to understand how my subjectivities may influence the type of data collected and how I interpret the findings.

Ultimately, these subjectivities can be viewed as a strength, not a limitation. A researcher's subjectivities may help achieve a deeper level of understanding about their research subjects' experiences and provide rich insights into contexts in ways that quantitative research cannot. In community-engaged research, ultimately, the embodied presence of the researcher, complete with their subjectivities, may contribute to social change (Ellingson, 2012).

Credibility

Credibility in qualitative research is considered to be the extent to which findings are considered trustworthy and believable to others (Bogetz et al., 2016). Credibility, or internal validity, can be achieved through thick description and practices such as multivocality and crystallization (Tracy, 2010). Throughout the findings section, in-depth illustrations of the various themes were provided and attempts were made to account for their culturally situated meaning. As described by Ellingson (2012), the ability to provide concrete and specific details strengthens the researcher's credibility. Such detail was frequently provided through direct quotes from a variety of participants. This practice of multivocality involves "showing rather than telling" and was achieved "through intense collaboration with participants" (Tracy, 2010, p. 844).

Crystallization is the practice of combining two or more sources of data, methods, theoretical frameworks, or even researchers to deepen the understanding of the issue (Tracy, 2010). Traditionally, this practice is referred to as triangulation. However, the aim of triangulation is to align the multiple sources in an attempt to find consistent interpretations (deMarrais & Lapan, 2004). Such an approach suggests the plausibility of a single truth and

overlooks a view of reality that is “multiple, fractured, contested, or socially constructed” (Tracy, 2010, p. 844). This research employed a variety of data source, from interviews to archival materials, built on multiple theoretical frameworks, not as a means to discount any research subjectivity, but to deepen the exploration and understanding of the research topic and participants. Credibility is demonstrated through this research by not seeking a single interpretation and hiding occurrences of disagreement. Rather, instances of contestation were highlighted in the findings to demonstrate the occurrence and negotiation of multiple meanings.

Resonance

As described by Tracy (2010), resonance, as a measure of research quality, is the extent to which the researcher provides “direct insight into the lived experiences of others” (p. 844). Sharing participant experiences in their own words throughout the findings, not only provides a meaningful, truthful account of the themes, hopefully, such writing invited readers to react, think, and interpret their own understanding of the participants’ experiences. Resonance is also achieved through a study’s ability to extend to other contexts or situations. Often referred to as transferability, this criterion evaluates the extent to which findings can be applied in different settings (Bogetz et al., 2016). A goal of this research is to extend the knowledge gained about the processes employed in this research to other opportunities for facilitating organization change. Transferability requires that the findings are meaningful to the reader and presented in such a way that the reader can envision how the research overlaps with their own situation (Jones et al., 2013; Tracy, 2010). With more than 40,000 nonprofit organizations focused on servicemembers, veterans, and military families, many of which offer programs to support military veteran mental health, efforts to uphold transferability will ensure the usefulness of the findings to similar organizations (Pederson et al., 2015).

Significant contribution

Tracy (2010) suggests that high quality research makes a significant contribution conceptually/theoretically, practically, morally, methodologically, or heuristically. From a practical and heuristic standpoint, a primary objective of this study was to develop a strategic plan to engage the SAVE organization towards actions that help achieve their ideal future. Through the AI process, participants were empowered to discover their own understanding of the organization's strengths, as well as frame potential areas in need of improvement. Ideally, the organization will fully engage in the fourth dimension of Appreciative Inquiry, Destiny, and appreciative learning will become part of the culture of the organization (Cooperrider et al., 2008). If so, then the ability of this research to make a practical significant contribution will be achieved.

From a scholarly perspective, this research extends organization literature in the way that it brings to light the ways members of an organization negotiate roles and navigate tensions in the construction of strategy, as well as the function of the strategic text in inspiring commitment and motivating change. From a conceptual and theoretical standpoint, this research contributes to a growing body of practice-based organization studies. This study also addresses a gap in practice-based literature by providing an application to military or veteran organizations.

Ethics

In the words of Miles et al. (2020), "we cannot focus only on the quality of the knowledge we are producing, as if its truth were all that counts" (p. 49). Considering the potential impact of the action of the researcher on all participants, as well as other researchers is a critical standard to any research study. As described by Tracy (2010), "ethics are not just a means, but rather constitute a universal end goal of qualitative quality itself" (p. 846). An ethical

research study takes into account how data are collected, maintained, and analyzed with confidentiality and data protection plans (AERA, 2009). This research study was carried out in accordance with IRB approval. All raw data collected was stored on K-State College of Agriculture/KSRE OneDrive. Access to the data with personal identifying information was only available to the researcher and to the researcher's Graduate Advisor through a password protected, OneDrive. Summaries of the data without assignment to individual contributors were provided to SAVE board members upon request. For written reports, all participants were assigned a pseudonym. All participants were provided with a description of the project purpose, process, and opportunity to provide or withhold your consent to participate. Each participant completed an informed consent form.

Meaningful coherence

The final component of quality qualitative research is meaningful coherence. In short, to what extent did the study achieve its stated purpose (Tracy, 2010)? The purpose of this study is to explore the successes and challenges of the SAVE organization through an AI process to inform the organization's future priorities and direction. A goal of this study was to better understand the leadership communication processes associated with strategic planning, and produce strategic planning documents for SAVE. The protocols developed and implemented aligned with the stated purposed and goals of this study. The methods and procedures were supported by a thorough literature review and built on a solid theoretical framework. Every effort was made throughout the research and written report to provide compelling evidence to illustrate findings (AERA, 2009).

To strengthen the quality of the findings, the researcher employed a process of member reflections, whereby, representatives from the SAVE organization, as well as partners from a

strategic marketing firm and third-party evaluator were invited to share their own perspectives and reflections on anonymized data and findings. Such a process is in alignment with a social constructionist framework where the goal is not to identify a single truth, but to provide space for multiple interpretations.

Summary

This chapter opened with a reminder of the purpose and questions guiding this study. A rationale for the use of a qualitative approach and how both an ethnographic and AI methodological framework were best suited to address the research questions was provided. A description of the research design, including an exploration of the membership role and researcher subjectivity were provided. Details were outlined regarding the data collection process including interviews, a focus group, an open forum, observations, activities with the board, and a review of documents and archived materials. The approach to the data analysis, management, and representation was explained and issues of reciprocity and ethics were explored. The chapter concluded with a discussion of the trustworthiness and rigor of the research. Building on the three complimentary theoretical perspectives – interpretivism, sensemaking and meaning-making in a community of practice, and strategy-as-practice, and employing the principles of AI, this research aimed to understand the individual and collective experiences and roles of members and partners of the SAVE organization, as well as the possibility for engaging leadership communication processes in facilitating organization change, especially for other veteran service organizations.

Chapter 4 - Practice and Application, Developing the Strategic Plan

The following chapter serves as an application brief to highlight the intentional design of the ethnographic data collection to inform the development of SAVE's strategic plan. The chapter opens with a description of the methodological frameworks that guided the strategic planning process, including ethnographic facilitation and Appreciative Inquiry (AI). A discussion of how the data was gathered and analyzed is provided, followed by discussing the outcomes and recommendations. By formatting Chapter 4 in this way, the practical outcome of the partnership with SAVE, the strategic plan, holds the possibility of extending and complimenting scholarly literature and may serve as an example of a participatory strategic planning process that may be useful for other military veteran service organizations. In this way, this chapter also seeks to answer RQ1 - what are the possibilities for engaging leadership communication processes such as appreciative inquiry (AI) in facilitating organization change?

This chapter may be adapted in the future as a draft practice or application paper suitable for submission to relevant, peer-reviewed, journals such as the *Journal of Higher Education Outreach and Engagement* or the *Journal of Leadership Education*. A practice or application paper applies established literature, research, and knowledge to a contemporary situation and demonstrates a practical application of theory or evidenced-based practice. This chapter opens with a description of the practice illustrating how the participatory process design to develop SAVE's strategic plan followed concepts and principles of both ethnographic facilitation and AI. In the section *Gathering the data*, examples of the questions and activities used during the interviews, focus group, open forum, and board retreat are provided. The data gathering section is followed by a brief description of the data analysis. The chapter concludes with a discussion of outcomes, reflections, and recommendations. The recommendations are actionable and intended

to suggest implications for practice based on the findings. The reflections and recommendations may serve to guide practitioners in assisting other organizations with designing and implementing strategic planning processes.

Included in Appendix D is the final Strategic Plan as adopted by the SAVE organization in July 2020. Including the final strategic plan represents the practical outcome of this research and reflects a commitment to community-engaged scholarship. In addition, as RQ3 relates to the role of the strategic text in inspiring commitment to the organization and motivating change, it is useful to include the text as an appendix as a reference for describing the response to this research question.

Description of Practice

The participatory process design to develop SAVE's strategic plan followed concepts and principles of both ethnographic facilitation and AI.

Ethnographic facilitation

Applying an ethnographic approach to developing a strategic plan for SAVE, the design of every step of the process and protocols encouraged participation and dialogue and provided the opportunity to observe how conversations and observations unfold (Sutherland, 2016). Data collection included various ethnographic methods, including interviews, a focus group, an open forum, and different facilitated touchpoints with the SAVE board. Insights gained during the interviews, focus group, and open forum informed the design of a facilitated virtual retreat. This type of ethnographic data collection across a substantial period is what Hartwig (2014) describes as *Ethnographic Facilitation* and allows for a “deep, nuanced understanding of the site, especially members’ cultural practices and communicative behavior” (p. 61). In keeping with the inclusive facilitation approach, monthly updates were provided to the organization’s board,

sharing summaries of information gathered, describing the next steps in the process, and seeking reactions and feedback. Before finalizing the strategic plan for SAVE, a draft was shared with all participants as an additional opportunity to hear their reactions and input.

Appreciative inquiry

AI is an approach to organization change based on the premise that questions and dialogue about strengths, successes, values, hopes, and aspirations are themselves transformational (Whitney & Trosten-Bloom, 2010). AI as a process is often described as a “4-D” cycle, including four phases: Discovery, Dream, Design, and Destiny (Figure 4.1) (Bushe & Kassam, 2005; Cooperrider et al., 2008; Cooperrider & Whitney, 2006).

Figure 4.1.

AI's 4-D Cycle



In the Discovery phase, individuals engage in dialogue to uncover an organization's life-giving forces. When is the organization at its best? What makes the organization unique and exceptional? Sharing individual reflections to these questions through dialogue with others results in a meaning-making process whereby an individual appreciation becomes a collective appreciation (Cooperrider et al., 2008; Shuayb, 2014). The Dream phase invites participants to

imagine what might be for the organization. What is an ideal future for the organization? This phase builds on the discovery of the history of the organization at its best and imagines a future in which the organization lives out its true potential (Cooperrider et al., 2008; Shuayb, 2014). In the Design phase, the dream begins to transition into a workable reality by identifying the elements necessary for effective organization change. During this phase, past successes are leveraged and new ideas for the future of the organization are created (Cooperrider et al., 2008; Cooperrider & Whitney, 2006). The goal of the final phase, Destiny, is to ensure that the dream can be fully realized and sustained. Actions, built on a collective appreciation, move the organization closer and closer to its ideal. To be truly sustaining, appreciative learning becomes part of the organization's culture. The organization continues to focus on the positive, life-giving moments, and encourages collaborative innovation towards an ideal future (Bushe & Kassam, 2005; Cooperrider et al., 2008).

AI is a participatory and collaborative approach to inquiry that seeks what is right about an organization to create change and the desired future (Preskill & Coghlan, 2003). Interviews, focus groups, open forums, and facilitated discussions with board members are the type of participatory and collaborative activities and data sources called for in an AI approach. Each of these ethnographic data collection techniques was employed to develop SAVE's strategic plan, following protocols designed to guide participants through each of the four AI phases.

Gathering the Data

Interviews were conducted with 12 participants of the SAVE programs. The interview format was in-depth and open-ended, with general questions developed in advance of the interviews to help guide the discussion. One focus group discussion was held with six SAVE employees and volunteers following a similar question format as the one-on-one interviews. One

open forum was held for 12 individuals representing organizations and companies with a history of collaborating with SAVE. Discussion questions and activities for the interviews, focus group, and open forum aligned with the first three AI phases (discovery, dream, and design) as described in Table 4.1.

Table 4.1.

Questions from Interviews, Focus Group and Open Forum and their Alignment with Phases of the AI 4-D Process

AI Phase	Questions from Interviews, Focus Group, and Open Forum
Discovery	<ul style="list-style-type: none"> Describe an experience when you observed SAVE at its best, delivering what you consider to be its core mission. What is it that SAVE is doing here and now that makes you particularly proud? What does SAVE and, by association, the Golden Prairie Honey Farm do exceptionally well?
Dream	<ul style="list-style-type: none"> Looking ahead in the next five years, what does your ideal future look like for SAVE? Looking ahead to 2025, five years from now, how do you envision the SAVE organization?
Design	<ul style="list-style-type: none"> What do you see as SAVE's areas of needed improvement? What are the critical issues that SAVE needs to face over the next five years? What do you see as the key priorities SAVE should establish in its strategic plan? What assets can you bring to the table to help SAVE achieve this vision? What are the most important services SAVE should provide in the next five years? What should SAVE not be doing?

As part of the strategic planning process launch, SAVE board members participated in a blue sky visioning activity that introduced them to the dream AI phase. Each member of the board was provided the following prompt and asked to provide a 200-word response:

It is May 2025, and you are attending a ceremony to celebrate SAVE's accomplishments and recognize the volunteers and program participants who helped SAVE reach this

Table 4.2.

Overview of Virtual Board Retreat Schedule

Time	Activity
9:30am	Welcome and Opening Remarks
9:40am	Establish Guidelines
9:50am	Strength-Based Icebreaker
10:15am	Activity #1 – SAVE’s Ideal Future
10:45am	Activity #2 – Opportunities and Losses
11:15am	Activity #3 – Advertisements for Change
11:45am	Reflections on the Day
Noon	Conclude

Following is a more detailed description of the deliberation design, including the activities and prompts used to facilitate various stages of the virtual board retreat.

Strength-based icebreaker

Preskill and Coghlan (2003) described AI's power as the way it calls upon participants to focus on their personal experiences. Connecting personal experiences to SAVE' strengths increases engagement and illuminates opportunities to co-create the organization's future. During the virtual retreat, board members were invited to share photos representing a time when they felt most alive and engaged as a member of the SAVE organization (Figure 4.3). This activity, titled *Root Causes of Success*, aligned with AI's *Discovery* (what gives life?) phase and served as an opportunity to understand how the personal experiences of individual members of SAVE have contributed to the organization's strength.

Figure 4.3.

Strength-Based Icebreaker, Root Causes for Success



SAVE's ideal future

In the *Ideal Future* activity (Figure 4.4), participants were presented with an image that collectively captured SAVE's ideal future as described during the previous data collection touchpoints. Retreat participants were invited to vote for the top four items that they would include in their vision of SAVE's ultimate future and then describe what actions they would commit to making that vision a reality. In keeping with AI's *Dream* (what might be?) phase, through this activity, participants focused on a desirable future state and identified the changes

necessary to achieve that ideal. As described by Brown and Thompson (2013), “strategic change is promulgated and resisted through stories of possible, desired and feared futures” (p. 1149).

This retreat activity intended to help make sense of those future stories.

Figure 4.4.

Activity Graphic to Guide Discussion of SAVE’s Ideal Future



Opportunities and losses

Several tension and dissent areas surfaced during the initial data collection process, including the interviews, focus group, and open forum. Each of these areas related to potential changes in the organization's future, changes that could be experienced as opportunities for SAVE, and losses. O'Malley and Cebula (2015) suggest that most do not experience a distinction between change and loss and that mobilizing others in addressing tough challenges requires us to speak to loss. During the *Opportunities and Losses* activity, participants were

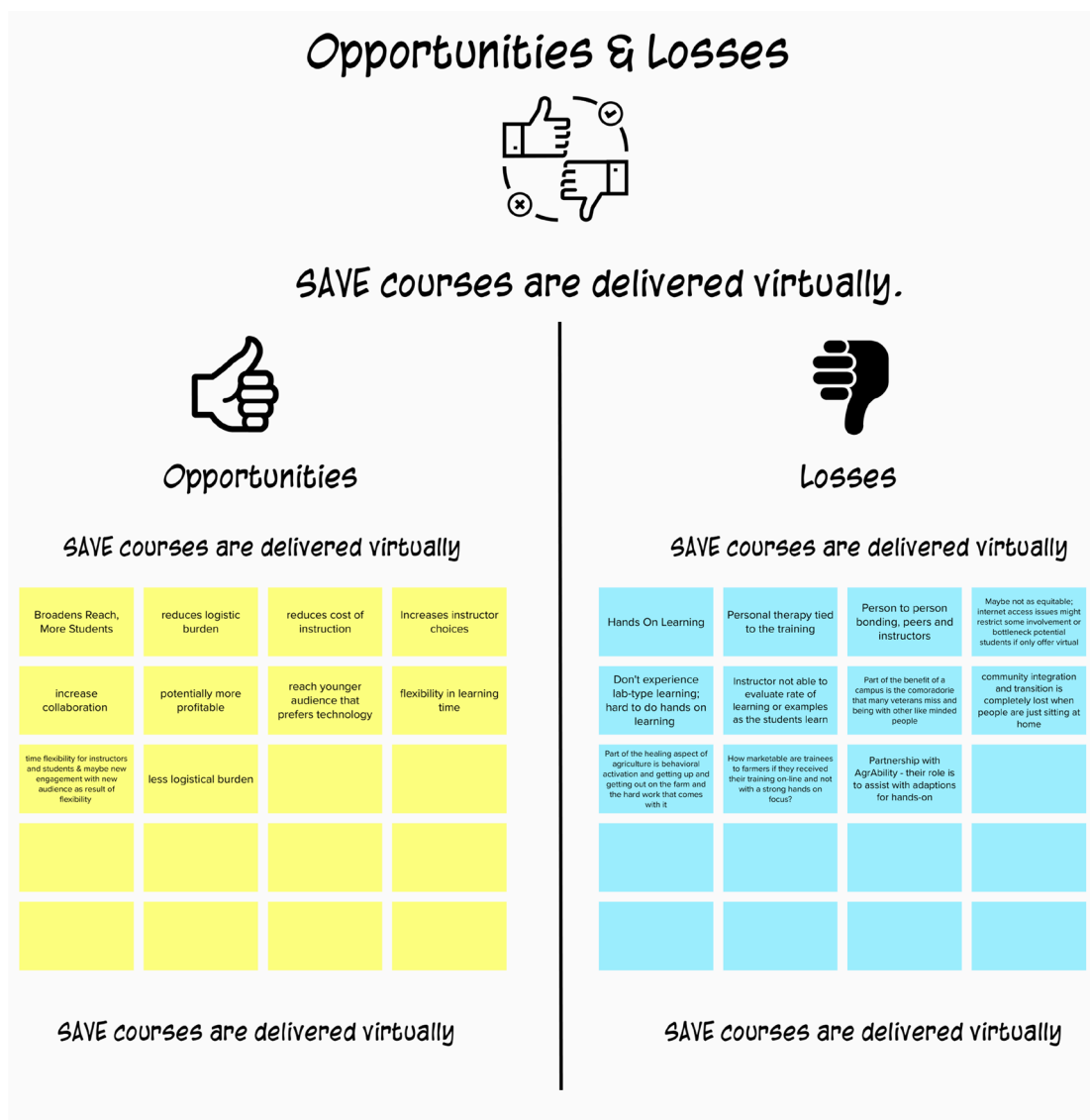
assigned to Zoom breakout rooms with a MURAL collaborative workspace for each of the following statements:

1. SAVE delivers agriculture and agribusiness training to all.
2. SAVE provides integrated behavioral health therapy to participating military servicemembers and veterans.
3. SAVE becomes a primary producer of pure honey.
4. SAVE expands the farmed acreage and geography where training and programs are offered.
5. SAVE courses are delivered virtually.

Participants were then prompted to describe the opportunities that might result if the statement were true and the losses that may be experienced. Providing retreat participants the space to express the potential losses that may occur with organization changes was intended to help build trust, validate feelings and perspectives, and create a means for moving forward (O'Malley & Cebula, 2015) (Figure 4.5). This activity represented a challenging transition in an AI process, the *Design* (how can it be?) phase, where participants begin to co-construct how to bring their dream into reality.

Figure 4.5.

MURAL Collaborative Workspace to Capture Discussion Related to Opportunities and Losses Activity



Advertisements for change

In the activity entitled, *Advertisements for Change* (Figure 4.6), participants were presented with six topic areas that were elevated during the interviews, focus group, and open forum as issues and focus areas for the organization. Those six topics include teaching and

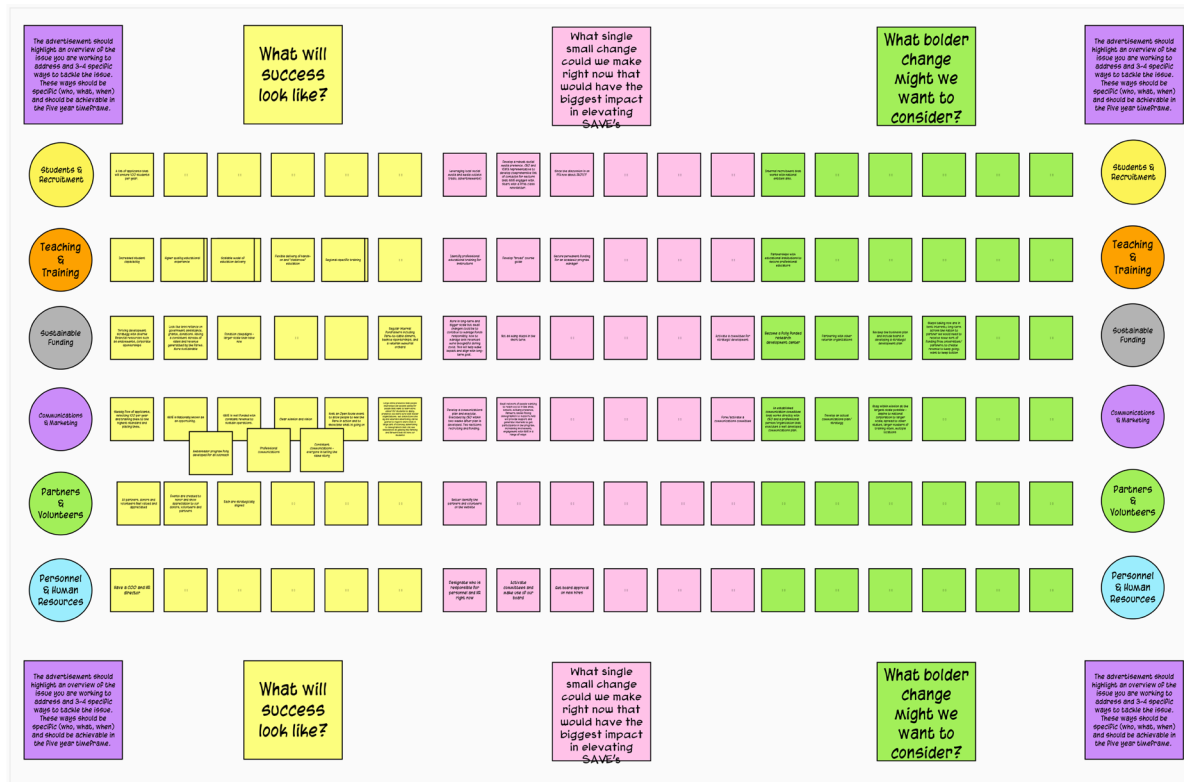
training, sustainable funding, personnel, and human resources, partners and volunteers, communication and marketing, and student recruitment. Participants were instructed to claim at least one category and create an advertisement for change. As participants created their advertisement for change, they were prompted to think about the following three questions:

1. What single small change could we make right now that would have the biggest impact in elevating SAVE's capacity?
2. What bolder change might we want to consider?
3. What will success look like?

Responses and dialogue around these questions introduced participants to the final AI phase, Destiny (what will be?). Through their advertisements for change, participants were empowered to declare the action items that would sustain change towards the desired future they built during the Dream phase.

Figure 4.6.

MURAL Collaborative Workspace to Capture Discussion for the Advertisements for Change Activity



Reflections on the day

As a final activity, participants were invited to reflect on the process and the information they learned during the retreat. Prompts included:

- In general, I notice that....
- I am surprised by....
- I wonder...
- Other reflections?

Given that participating in virtual events was still relatively new to many participants, many of the reflections related to their surprise that such a format could still allow for productive

interaction. For example, one participant shared their surprise with the process, “I gotta be honest with you, I was a little skeptical when you said you wanted to do a remote Zoom meeting, but it went really well.” This final reflective activity helped to communicate both shared and personal understandings of participants’ experiences of the virtual retreat and generate meaning and create opportunities for future learning.

Analyzing the Data

The data analysis process was described more fully in Chapter 3. In general, transcripts and notes from interviews, the focus group, and open forum were coded following an eclectic evaluation and pattern coding method using NVivo qualitative analysis software (Version 12, QSR International, 2018). Fifteen broad categories or descriptive themes were generated from this round of data analysis which helped serve as the basis for the design and facilitation of the virtual board retreat. Following the facilitation, transcripts and other data generated from the retreat were evaluated for the themes to inform the writing of the strategic plan. The coding process that followed the facilitated board retreat helped to narrow the original 15 themes to six priority areas:

1. Strengthen our financial and operational capabilities
2. Enhance student recruitment and focus on student care
3. Improve our academic instruction and delivery
4. Implement systems to improve internal communication and external marketing and outreach
5. Build a partner and volunteer program that focuses on recruiting and retaining new and current partners and volunteers
6. Develop clear ways to measure, evaluate, and communicate the impact of our work


With the data analysis following the eclectic format, recommended action items aligned with each of these six priority areas and become the strategic plan content for how the organization plans to address each priority. As illustrated in the example in Figure 4.7, during an interview, a participant recommended engaging more deliberately with the Soldier for Life Transition Assistance Program at Fort Riley as a means to attract more students. This recommendation became an action item in the adopted strategic plan to address the second priority action item. The coding process made the work of drafting the strategic plan easier, but also improved confidence that a comprehensive review was conducted to inform the plan.

Figure 4.7.

Coding in NVivo Simplified the Process of Writing SAVE's Strategic Plan

Nodes

- Name
- Appreciative Inquiry
- Constructivist Grounded Theory
- Developing Strategic Plan
- Descriptive
 - Board
 - Common Vision
 - Communication & Marketing
 - Data Collection & Research
 - Farm & Campus
 - Founder Impact
 - Funding
 - Growth & Opportunities
 - Partners & Volunteers
 - Personnel & Human Resources
 - Students & Recruitment**
 - Teaching & Training
 - Therapy & Behavioral Health
 - Veterans & Servicemembers
- Magnitude
- Recommendation



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SERVICEMEMBER AGRICULTURE
VOCATION EDUCATION (SAVE) 2020-2025


**ENHANCING STUDENT RECRUITMENT
AND FOCUS ON STUDENT CARE**

**ADDRESSING
THIS
PRIORITY**

- Focus recruitment and training on our core clientele - servicemembers, veterans, and their families.
- Leverage local social media and traditional media outlets such as radio and advertisements to significantly expand messaging and recruitment.
- Develop a comprehensive list of contacts to assist actively with recruitment including SAVE program alumni, the Department of Veterans Affairs (VA), Kansas Department of Labor, Kansas National Guard Public Affairs Office (PAAO), Ft. Riley Soldier for Life program, U.S. Department of Agriculture, and more. Continuously add to and maintain recruitment contact list.
- Identify at least two veteran-focused career transition events and one general agricultural training opportunity fair per year to attend in person and promote our programs.
- Engage with military and agricultural high school programs including Junior Reserve Officer Training Corps (JROTC) and FFA.
- Continue to offer all of our program participants access to behavioral health.

Reference 8 - 1.33% Coverage

But when I went through SFL TAP, Soldier for Life Transition Assistance Program, at Fort Riley, then all these industries came in advertising their company for these people transitioning out of the military. And that was a great moment, I thought, for SAVE farm people to come in and be like, hey, if you're interested in farming, we have this course and we'll help you pay for that schooling.



Discussion of Outcomes

When first invited to facilitate the development of SAVE's strategic plan, the following goal was set: to facilitate an inclusive, transparent, and well-informed process. Staying true to

that expressed goal was a key personal outcome of this process as the facilitator and researcher. Through a combined networking and snowball approach, the net was cast wide to identify relevant participants and ensure an inclusive strategic planning process. Transparency was upheld through routine updates on the process with summarized findings to the SAVE board at monthly meetings. All data captured through the MURAL collaborative space was shared directly with participants following the virtual retreat. While every effort was made to be transparent, confidentiality was maintained for any information provided during one-on-one interviews, and names were removed from any information reported from the focus group or open forum. A wide range of background sources from meeting minutes, archival reports, and even financial statements were reviewed to ensure the process was well-informed.

Three other outcomes are worthy of sharing for others interested in employing a similar strategic planning process. These include the opportunity to celebrate strengths despite adversity, seek and create a shared mission and vision, and promote active use of the strategic plan.

Celebration of strengths

One of AI's principles is that it is fundamentally optimistic (Cooperrider et al., 2008). Building SAVE's strategic planning process based on this principle allowed participants to focus on and celebrate the organization's strengths. Strategic planning processes that are not asset-based often seek to identify problems and challenges and then identify the actions necessary to address those issues. As described by Cooperrider et al. (2008), there are two paradigms of organization change. A problem-solving paradigm identifies a problem, analyzes the causes and possible solutions, and then develops an action plan. In this paradigm, the organization is a problem to be solved. Bushe and Marshak (2015) describe this paradigm as a diagnostic organization development mindset. In diagnostic organization development, data collections

informs linear problem-solving methods leading to change (Bushe & Marshak, 2015). Assessing the problem and directing the process is leader-centric (Bratt, 2020). An appreciative paradigm begins with valuing the best of what is, envisioning what might be, engaging in dialogue about what should be, and then innovating what will be. In the appreciative change model, an organization holds infinite possibilities and is a mystery to be embraced (Cooperrider et al., 2008). The appreciative paradigm aligns with a dialogic organization development mindset, where change is created through dialogue and negotiation to generate new ideas and possibilities (Bushe & Marshak, 2015).

Like many non-profit organizations that are sustained through donor support, grants, and volunteers, SAVE has experienced many challenges. Despite these challenges, participants could readily identify the organization's strengths when provided the positive space to voice their perspectives. When asked to describe SAVE at its best, participants shared the organization's strengths as "veteran-focused," "provides an opportunity for healing," having "passion and heart," and "committed to teamwork." Participants were also prompted to share what personally made them proud to be a part of the organization. One interview shared a sentiment echoed by several others that they were proud of "thinking about how some of the folks have turned their lives around because the program" and that "we've probably prevented suicides and helped people find purpose." Focusing on the organization's strengths, what the organization does exceptionally well, sets the stage for sustained positive change (Fifolt & Lander, 2013). Through the AI strategic planning process, participants were able to celebrate their strengths and begin to imagine how those assets could be leveraged to address their challenges. For practitioners working with a community partner or organization where current challenges may be masking their potential and strengths, the positive, asset-based principles of AI may be an appropriate fit.

Shared vision and mission

One of the strategic planning process's desired outcomes, as defined by the organization's leadership, was to revisit the existing vision and mission statements to ensure they reflect SAVE's strengths and future direction. While the organization's vision and mission were frequently held up as a strength of the organization, participants also expressed concern that the statements were too wordy and lacked focus (Table 4.3). As one of the last activities in drafting SAVE's strategic plan, participants were invited to craft statements that were then combined and adapted to become the organization's new mission and vision statements as reflected in the final strategic plan. To address the concern that the original vision statement lacked focus, members offered specific metrics to define results and the types of behaviors necessary to generate success. These metrics became a section of the strategic plan called, Enhancing Our Vision (Figure 4.8). In this way, participants were able to build on what they considered to be the positive core of the organization, a compelling mission, and vision, and genuinely co-create a vision, mission, and purpose around which members of the SAVE community can commit in the future.

Table 4.3.

SAVE's Mission and Vision Statements Prior to the Development of their Strategic Plan

Mission Statement (2015-2020)	Vision Statement (2015-2020)
To provide a training farm with an adjacent clinic, assist servicemembers and veterans to transition, to find purpose and meaning in life and enable them to learn valuable vocational skills to meet the demand for agricultural ownership, employment, or other advanced schooling. Facilitate healing for those in need and place those trained on working farms.	To provide occupational agricultural training and engagement to a significant number of veterans, servicemembers, and family members on a training farm in Kansas. In time a SAVE Farm will exist on all land grant universities.

Figure 4.8.

Mission and Vision Statements in SAVE's Strategic Plan



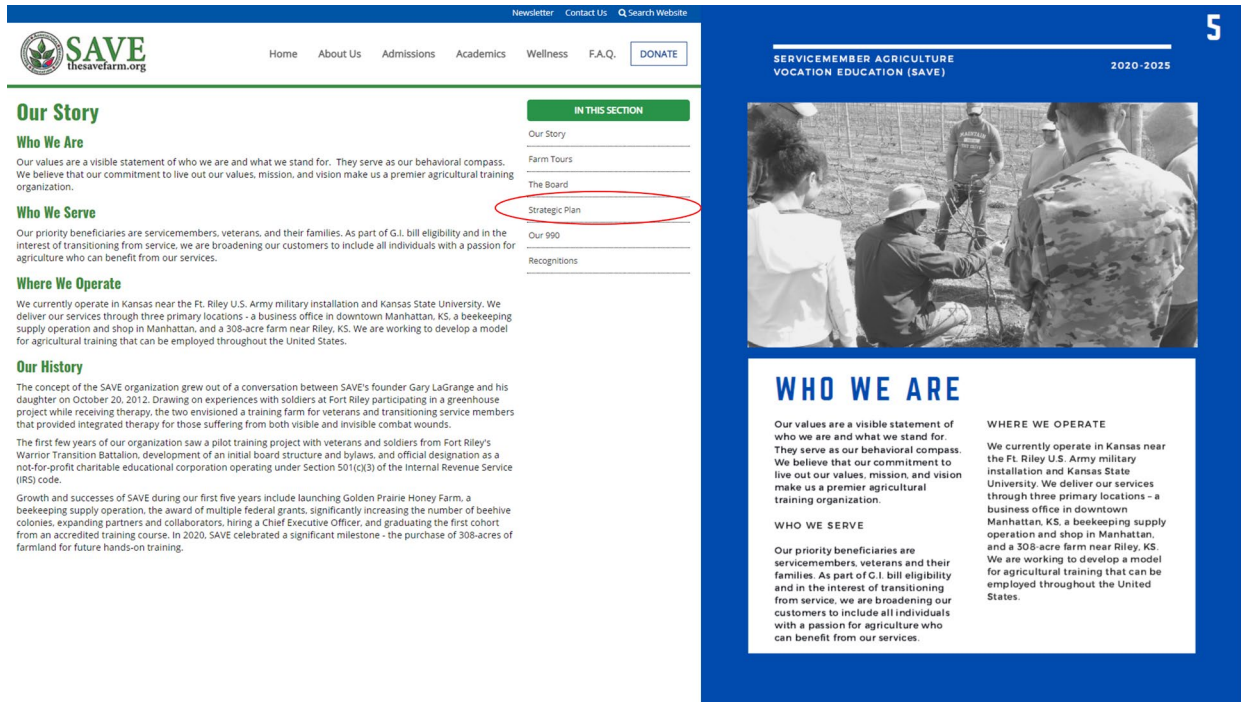
Active use of the strategic plan

In July 2020, the SAVE board adopted their strategic plan marking a successful practical outcome of this engagement for the organization. While the process of developing the strategic plan held value in engaging community and advancing communication, two outcomes of community-engaged scholarship, another expressed desired outcome was to use the plan to promote organization change. A common pitfall of a planning process is to invest time and resources in the development of the plan and then allow it to sit on a shelf and collect dust (Mintzberg, 1994). Putting the plan to active use is a critical achievement of organization strategic planning (Elbanna et al., 2016).

Following adoption by the board, the strategic plan was added to the organization's website, and the website was redesigned to mirror portions of the plan. For example, as shown in Figure 4.9, a part of the organization's website describes who they are, who they serve, and where they operate. The web page content was pulled directly from Page 5 of the final strategic plan.

Figure 4.9.

SAVE's Website Includes a Link to the Strategic Plan and Site Content Mirrors Portions of the Plan



Since the board adopted the strategic plan, the document has also been used as a reference in grant applications and as part of a fundraising and donor campaign. During a board meeting, the board's chair noted that having a plan adds credibility to the organization and provides partners a clear understanding of SAVE's future direction. When reporting on efforts to

partner with an agribusiness accelerator program, he shared, “I sent them a copy of our strategic plan and they read it over and we're just thrilled with what we are proposing.”

The excitement of having a completed strategic plan was described by one participant as “it just feels like we’re on a rocket that’s about ready to blast off.” Sustaining that excitement and the initial level of active use of the strategic plan is the final AI phase's (*Destiny*) difficult work. The “newness” of the plan will wear off, changes in leadership and membership will occur, and the organization will encounter new challenges. However, the organization's ability to feel a commitment to and actively use the strategic plan through the hardships and distractions of the COVID-19 pandemic is encouraging.

Reflections and Recommendations

As described by Carcasson related to goal-oriented deliberative processes, “Each event is a learning opportunity” (Carcasson, 2009, p. 9). Designing and facilitating the process to develop SAVE’s strategic plan was definitely a learning opportunity. Three key takeaways from the process include (1) AI presents both challenges and opportunities; (2) the positive approach typical of AI does not ignore problems or avoid dissent; and (3) the value of intentionally connecting theory to the process and design and being willing to adapt the protocol throughout the process. These takeaways hold implications for practitioners and are useful for considering the ways this process may be applied and adapted for other strategic planning initiatives. The following reflections and recommendations open the possibilities for engaging leadership communication processes such as appreciative inquiry (AI) in facilitating organization change for other veteran service organizations.

AI presents opportunities and challenges

A good litmus test for determining whether the facilitation approach and protocol were appropriate to the context is to ask whether you would make the same decision if given the opportunity to do it again. Despite a few challenges, the AI process was a good fit, and if time were reversed, I would select the same framework to help the organization develop their strategic plan.

One of the primary reasons AI seemed to work in this application is the *positive principle*. AI's positive principle sets the stage for sustained positive organization change in "which individuals choose to envision the possibilities for a positive future rather than dwell on the negative aspects of their situation" (Fifolt & Lander, 2013, p. 21). This long-lasting change process is built on things like hope, excitement, purpose, possibility, and joy (Bushe & Kassam, 2005; Cooperrider & Whitney, 2006; Fitzgerald et al., 2003).

SAVE's participants were frequently surprised by the upbeat line of questions. As illustrated by the response from one interview when asked to describe SAVE at its best, "Wow. Positive thinking, I like that." Particularly in the interviews and focus group, once that first positive question was posed, the participants appeared to relax and seemed to gain energy throughout the discussion. Asking participants to reflect on and assess their organization and practice can be a difficult and intimidating process. AI provided an opportunity to focus on SAVE's strengths while helping to make sense of potential tensions that might arise. As described by Cooperrider et al. (2008), "human systems grow in the direction of their persistent inquiries" (p. 34). Building the protocols around affirmative and optimistic questions encouraged participants to focus on the organization's core strengths and hopefully mobilize SAVE towards positive change.

Another aspect of AI that made for a good fit in the development of SAVE's strategic plan is the use of storytelling as a discovery method. Open-ended questions created space for personal narrative and opportunities to learn how individuals viewed their connection and contribution to the organization (Michael, 2005). As part of what is referred to as the *poetic* principle of AI, an organization's story is constantly being co-authored, and the past, present, and future are endless sources of learning and inspiration in the development of that story (Bushe & Kassam, 2005; Fifolt & Lander, 2013; Fitzgerald et al., 2003).

Each interview and the focus group and open forum started with participants' opportunity to share their personal connection to the SAVE organization. One interviewee shared, "no one's ever really asked me before, what is my story?" What followed in their response illustrated a deep sense of personal relationship and responsibility for the success of the organization. Open-ended questions and the space for storytelling allowed for more vivid illustrations of the organization's strengths. For example, in the following story, the interviewee describes his personal experience with some of the healing and behavioral health programmatic strengths of SAVE:

"We were harvesting honey, and we came across the hive that either had swarmed or got robbed or something. So, it was it was a failed hive, essentially. You know, in a set of eight or nine, there at the K-State's student farm. And I remember, you know, we took the hive back to the truck, you know, we kind of cleared it out a little bit and set it there. And I remember the look on (his) face. It was just like really sad. He was like, you know, you just hate to see that, you wonder what else could I have done for it? We did everything we could and it just didn't work out. And so that was a powerful connection for me because it just showed how many connections there are when we really engage

with this world that God has created. So, it's just a powerful moment, I guess, where I realized, man, there's so many connections every day I could be making to not only strengthen myself physically, but also emotionally and spiritually.”

Typically, strategic plans may feel far from *poetic*, with mission statements, action items, and milestones. Efforts were made to capture these examples of storytelling and personal narratives in SAVE’s strategic plan, without compromising confidentiality, as a visible reminder of the individual and collective impacts that happen when SAVE is at its best (Figure 4.10).

Figure 4.10.

Examples of Capturing Personal Narratives in SAVE’s Strategic Plan



While an AI process worked well for the SAVE organization and its strategic plan development, the approach presented a few challenges. The first challenge relates to time and the

sustainability of the positive principle, and the second relates to the response to such a positive, participatory process from military veterans.

As member of the SAVE board, I had unique access to documented and historical knowledge and fellow members of the organization for an extended period. Such access may not be typical for an outside facilitator invited into an organization to assist with developing a strategic plan. The ability to extend the information gathering and input process across several months provided the opportunity to deliberately present and focus on each of the AI 4-D phases. Following the board's strategic plan adoption, my unique access and trust within the organization allowed me to continue to build the principles of AI into reports and interactions with board members. Especially as the fourth AI phase (*Destiny*) strives to empower the members of the organization to learn and adjust to changes experienced with the implementation of the strategic plan, finding ways to sustain the positive principles of AI while transitioning away from the role of facilitator to that of a board member is a significant challenge.

The second challenge of applying an AI approach with the SAVE organization is that many board members and participants are military veterans. The organization's leadership and the board are heavily comprised of high-ranking military veterans. An appreciative inquiry approach has been applied to many industries, but there are very few reports of AI being used as a strategic planning tool in a military setting (Heflin et al., 2016). Applying an AI approach to the development of SAVE's strategic plan required a fundamental understanding of and sensitivity to a military setting's cultural foundations.

In particular, the process for developing SAVE's strategic planning process attempted to acknowledge the military's rigorous adherence to command-and-control, the value of history, and a focus on problem-based approaches. Endemic to the military is a deep appreciation of rank

and hierarchy that lasts even when individuals transition to civil life and no longer hold military rank (Heflin et al., 2016). Appreciative inquiry creates a space where hierarchy and command-and-control decision-making are temporarily suspended (Powley et al., 2004). For participants like the SAVE organization members, this can be viewed as intentionally challenging the valued chain of command. To help demonstrate an appreciation for rank and hierarchy, the proposed process and timeline for developing the strategic plan was first provided to the organization's CEO (retired Lieutenant Colonel, U.S. Army Reserves), founder (retired Colonel and former Installation Commander, U.S. Army), and board chair (retired Lt. General, U.S. Army and former Commanding General) for review and approval. Following the proposal's consent, the CEO formerly introduced the process at the following board meeting. As a visible reflection of an appreciation for hierarchy, the final strategic plan opened with a letter from the CEO (Figure 4.11).

Figure 4.11.

Opening Letter from SAVE's CEO

2

A WORD FROM THE CEO

To Our Stakeholders:

SAVE has undergone a remarkable evolution in the past five years as we've pursued our vision to serve as a sustainable model for hands-on agribusiness training and integrated behavioral health therapy for veterans and their family members. Offering our unique brand built around four equally strong commitments to our students, community, partners, and the environment we are embarking on the next phase of our journey.

During the next five years, we will improve our financial position, enhance student training and care, improve our academic delivery, implement systems that facilitate better communication with all stakeholders, build a an even stronger partner network, and evaluate the impact of our work.

In order to achieve success, we must consistently work to achieve our goals through integrated initiatives that place a high priority on moving us forward on multiple fronts simultaneously and collaboratively. We believe these objectives provide us a clear line of sight toward our vision and create value across the entire organization.

I want to personally thank the many stakeholders who have helped us achieve our past results through their direct engagement and contribution. I ask for your continued support for the next five years as we forge ahead with our groundbreaking mission.

Sincerely,

Craig Bowser



DR. CRAIG BOWSER
CHIEF EXECUTIVE OFFICER

In addition to a deep appreciation for rank and hierarchy, the U.S. military is steeped in tradition. Future military decision-making often draws on history and values past decisions. The

tendency to protect the past may mean that the futuring, dream phase activities AI may be met with a resistance to change (Heflin et al., 2016). Demonstrating respect for SAVE's brief past, a portion of the strategic plan was dedicated to a narrative and timeline of the organization's history (Figure 4.12).

Figure 4.12.

SAVE's History as Captured in Strategic Plan



OUR HISTORY

The concept of the SAVE organization grew out of a conversation between SAVE's founder and his daughter on October 20, 2012. Drawing on experiences with soldiers at Fort Riley participating in a greenhouse project while receiving therapy, the two envisioned a training farm for veterans and transitioning servicemembers that provided integrated therapy for those suffering from both visible and invisible combat wounds.

The first few years of our organization saw a pilot training project with veterans and soldiers from Fort Riley's Warrior Transition Battalion, development of an initial board structure and bylaws, and official designation as a not-for-profit charitable educational corporation operating under Section 501(c)(3) of the Internal Revenue Service (IRS) code.

Growth and successes of SAVE during our first five years include launching Colden Prairie Honey Farm, a beekeeping supply operation, the award of multiple federal grants, significantly increasing the number of beehive colonies, expanding partners and collaborators, hiring a Chief Executive Officer, and graduating the first cohort from a 40-hour accredited certificate training course. In 2020, SAVE celebrated a significant milestone – the purchase of 308-acres of farmland for future hands-on training.

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SERVICEMEMBER AGRICULTURE
VOCATION EDUCATION (SAVE)

2020-2025

OUR HISTORY



12

The final challenge experienced in employing AI with an organization heavily comprised of military veterans is the response to the positively focused questions and activities. While AI does not ignore challenges, the methodology is fundamentally positive (Powley et al., 2004; Reburiano, 2019). Therefore, an appreciative approach may feel “weak” to military leaders and “perceived as skirting a problem rather than facing it head-on” (Heflin et al., 2016, p. 75). Acknowledging this potential concern in the AI process, participants were asked questions related to areas needing improvement and encouraged to identify bold changes necessary to address those challenges.

In light of these observations related to the potential tensions of applying an AI approach to a military veteran organization, practitioners might consider similar adaptations to improve the fit of an asset-based approach with the culture of an organization. To some extent, all organizations have a “culture” and perhaps many are challenged by power and the desire to control outcomes. For this reason, the ways in which this facilitation and planning process were adapted to meet SAVE’s culture may be useful to other practitioners.

For this process, an awareness of the value placed on rank and hierarchy was built into the planning process through kick-off meetings with the organization’s leadership and opening the strategic plan with a letter from the CEO. An appreciation for a military culture’s value of history was reflected by intentionally devoting a portion of the interview questions and strategic plan to highlight the organization’s important history. Perhaps the most significant process adaptation was ensuring the process allowed for the identification and discussion of challenges, while still focusing attention on the organization’s strengths. As described in the following section, just because AI is a positive approach does not mean that problems are ignored, or dissent is avoided.

Positive approach does not ignore problems or avoid dissent

Critics of the AI approach argue the term appreciative and the focus on positive experiences do not consider other perspectives or emotions that could be potentially important to organization change (Barge & Oliver, 2003). Some case studies on the use of AI found that participants viewed the process as disregarding negative feelings and isolated participants who found themselves unable to voice dissatisfaction (Reburiano, 2019).

Powley et al. (2004) argue that a strength of AI is the ability to embrace challenges and concerns endemic to an organization as part of the full range of experiences that give life to a system. The application of AI in developing SAVE's strategic plan did not ignore problems or avoid dissent. Instead, issues and concerns were reframed as areas in need of improvement and identified how the organization's assets could drive change in those areas of need. One participant likened the balance of positive with problems to "the flower and the cactus," where the flower is positive and the cactus negative. He went on to note, "you've got to take the cactus with the flower." This process sought to do just that, leading with the flower without minimizing the value and need to explore the cactus.

The COVID-19 pandemic and national events in 2020 impacted the organization's recruitment, enrollment, and finances. No amount of positive facilitation and artful reframing could hide SAVE's challenges or reduce the students', stakeholders', and board members' stress. However, the AI approach allowed participants to leverage their strengths to take on these challenges during a challenging year, charting the path for a positive future in the years ahead. This study provides an example of how AI can be applied to focus on an organization's strengths while allowing space to negotiate differences and address challenges. Practitioners wishing to balance AI's positivity principle with a need to address organization challenges might draw upon

the example activities shared in this chapter and incorporate questions that frame problems as opportunities for growth and improvement.

Be intentional and adaptive with design

When designing a participatory process, Carcasson (2009) advises that “practitioners must ‘begin with the end in mind’ in two important senses: the long-term end of improving community problem solving and the short-term specific ends of particular projects” (p. 3). With the adoption of the final strategic plan by the SAVE board in July 2020, the short-term specific ends of the project were met. Developing and delivering the strategic plan was made possible because the process was designed with the “end in mind.” Each facilitated activity and each data collection touchpoint provided meaningful input to create the organization’s plan. While detailed protocols helped ensure a consistent process was applied and progress was made towards the short-term goals, a willingness to be adaptive was key to a successful outcome. The intentional design of the process to develop SAVE’s strategic plan contributes an example of how practitioners might build a similar process focused on an organization’s short and long-term goals. More than a series of activities and interview prompts, this process was built on a conceptual and theoretical framework and each part of the process was designed to intentionally to create positive change for the SAVE organization.

Not only did the COVID-19 pandemic require changes in how facilitations could occur, feedback from participants throughout the process helped inform the tweaks needed for the next steps in the process. Participants were an active part of the strategic planning process's iterative design. The goals of each activity from start to finish were clearly communicated to participants throughout the process. Rather than operating in a black box, summaries of the information collected at each step were shared with the SAVE board. All participants were invited to review

and provide feedback on a preliminary and final draft of the strategic plan. For example, recall the *Opportunities and Losses* activity described above. The six statements used as a basis for that activity came from participants' information from the interviews, focus group, and open forum. While the concept of an activity that would allow participants to acknowledge the impact of change was part of the initial design, the specifics examples of potential opportunities and losses could not have been preconceived.

The process of developing SAVE's strategic plan was intended to set the organization on a course toward the long-term goal of improved community problem-solving. As Carcasson (2009) suggests a well-designed and executed deliberation process can pave the way towards that end goal. First, it must accomplish first-order goals such as improved democratic attitudes and second-order goals such as improved institutional decision-making. By engaging a diversity of participants, from SAVE employees and leadership to external stakeholders, the process was designed to begin improving democratic attitudes by promoting engagement and attempting to level power issues. All participants were invited to actively contribute ideas towards developing the organization's strategic plan.

With less than one year under their belt implementing the strategic plan, it may be too early to tell whether the facilitated strategic planning process has improved institutional decision-making. There are positive signs that the organization is on the path towards that long-term goal, as described in how SAVE is actively using its strategic plan for making decisions. At the same time, there are indications of possible derailment where institutional decisions are made outside of collaborative and deliberative processes modeled to develop the strategic plan. Sustaining the positive, life-giving attitude called for in AI's *Destiny* phase will require the organization to

commit to the same cooperation that co-created their strategic plan for the plan's long-term successful implementation.

Summary

This chapter addresses the practical contributions of this community-engaged research. By describing the design, data collection, outcomes, and reflections, this chapter's content may be adapted in the future draft practice or application paper suitable for submission to relevant journals such as the Journal of Higher Education Outreach and Engagement or the Journal of Leadership Education. This chapter provides examples of how the facilitated process and data collection directly contributed to SAVE's strategic plan drafting. This chapter offers practitioners a model for a participatory strategic planning process that may be useful for other military veteran service organizations.

Chapter 5 - Findings, Implications, and Future Research

The purpose of this study is to explore the successes and challenges of the SAVE organization through an AI process to inform the organization's future priorities and direction. Exploring research questions through a qualitative approach helped advance understanding and the limited literature related to practice-based organization studies for military and veteran service organizations. Four research questions guided this study and reflected a commitment to community-engaged scholarship, highlight the practical implications of this study, and address a gap in organization management literature, specifically for veteran-affiliated nonprofits.

RQ1 - What are the possibilities for engaging leadership communication processes such as appreciative inquiry (AI) in facilitating organization change?

RQ2 - How do participants negotiate their role in the construction of the strategy for the organization?

RQ3 - How does the strategic text inspire commitment to the organization and motivate change?

RQ4 - What tensions emerge as participants engage in the participatory process to develop the organization's strategic plan?

Data gathering was accomplished through interviews, a focus group, an open forum, observations, correspondence, review of archival data, and facilitated discussions with the board. Using a constructivist grounded theory approach, this research builds on the principles and concepts of sensemaking, meaning-making, and strategy-as-practice. Data collected from the in-depth qualitative fieldwork were analyzed using an inductive approach to explore the research questions.

General Organization of Findings

The following sections present the findings related to three of the research questions and purpose. These results illustrate the various ways participants, many of whom are retired high-ranking military veterans, engage in a strategic planning process designed to be inclusive and transparent. Chapter 4 presented findings and discussion relative to RQ1 - what are the possibilities for engaging leadership communication processes such as AI in facilitating organization change? While a summary of the response to RQ1 is presented below, attention in this Chapter is directed to the findings and discussion of the remaining research questions.

As the findings intersect with multiple research questions, it is not fitting to simply present the findings sequentially to each question with no overlap. Instead, the findings are presented in terms of patterns or themes, with the theme of emerging tensions occurring across several of the research questions. For this reason, this chapter opens with a brief summary of response to each of the research questions, followed by the presentation of the findings across three tensions that emerged as participants engaged in the participatory process to develop the organization's strategic plan (RQ4). Findings related to RQ2 and RQ3 are presented in the context of the themes of the three emerging tensions. Pseudonyms have been assigned to all participants.

Response to Research Questions

Did the study answer the research questions? The following section provides a brief response to each of the research questions. Additional analysis of these questions is provided later in this chapter as a presentation of findings across three tensions. Aspects of the questions left unanswered or new questions that arose from this study are considered in the Future Research section towards the conclusion of this chapter.

RQ1 – What are the possibilities for engaging leadership communication processes such as appreciative inquiry (AI) in facilitating organization change?

This study provided an example of a participatory strategic planning process that may be useful for other organizations, especially military veteran service organizations. Chapter 4 was provided in the format of a future practice paper so that the approach and protocol may be adapted and applied to other organizations seeking strategic change. Chapter 4 also outlined recommendations for balancing the positive principles of AI with the value of surfacing tensions. This study provided an opportunity to apply AI to a military strategic planning initiative as there are few reports of AI being used in such a setting. Recommendations in Chapter 4 offer some ways in which this study and participatory process was adapted to demonstrate a fundamental understanding of and sensitivity to a military setting's cultural foundations. By formatting Chapter 4 as a practice or application paper, the chapter provides a positive response for the possibilities for engaging leadership communication processes such as AI in facilitating organization change.

RQ2 - How do participants negotiate their role in the construction of the strategy for the organization?

Strategic change is a negotiation process. During times of disruption, as can be the case when introducing a strategic planning initiative, the basic meanings relevant to the organization are up for grabs. The organization's mission, who the organization serves, and where resources and efforts will be focused in the future are available to claim and define. Strategy actors sort through these ambiguities through a contested process where those with the greatest skill or power construct the reality for the organization.

Participants in this study negotiated their role in the construction of SAVE's strategy by reinforcing a common military background and through what Kaplan (2008) calls "framing contests" (p. 730). The practices of naming and interpreting were frequently employed as part of the meaning-making process in developing SAVE's strategic plan. The use of military terms and references demonstrated an appreciation for military structure and command-and-control decision-making. This practice appealed to those SAVE members with a military history, but marginalized those who may not have the same shared experience.

As part of the sensemaking process, participants bracketed and labeled several cues deemed important for defining the organization's purpose and future direction. Two examples of these cues include who the organization serves (veterans or a more general audience) and the role of behavioral health as a programmatic focus. When it became apparent that decisions about these topics were not congruent, participants engaged in framing practices to gain support for their interests and influence how others see the issue. Framing is a purposeful part of the sensemaking process and, even when highly contested, can help shape collective outcomes and produce meaning for an organization. As is the case with SAVE, framing is also a process that implies agency and can be disrupted by power, especially in a traditional hierarchical, command-and-control setting.

RQ3 - How does the strategic text inspire commitment to the organization and motivate change?

SAVE's strategic plan played an active role inspiring commitment to the organization, motivating change, and legitimizing prior decisions. In keeping with the principles of meaning-making, the plan was reifying. As the produced object resulting from the strategic planning process, the plan helped congeal participants' experience into a "thingness" (Wenger, 1998, p.

58). The plan was then actively used by SAVE to create grant proposals and advocate for donor support. The strategic text became a player in the “framing contest” as it was used as tool for sensemaking for stakeholders. By sharing the strategic plan with SAVE’s external stakeholders and potential future partners and donors, the plan helped articulate a specific version of the organization’s reality and frame their new strategic orientation (Fiss & Zajac, 2006). As described by Gioia and Chittipeddi (1991), the strategic text represents a shift from sensemaking to sensegiving, whereby the plan is disseminated to stakeholders and constituents so they might be “influenced to comprehend, accept, and act upon to initiate the desired change” (p. 444).

RQ4 - What tensions emerge as participants engage in the participatory process to develop the organization’s strategic plan?

Three overarching tensions emerged as participants engaged in the participatory process to develop the organization’s strategic plan. These tensions include (1) tensions in the transition from top-down to more inclusive strategic planning, (2) tensions between conflict and mutual engagement; and (3) tensions in the relationship between practitioners and strategic objects in creating meaning. This study was grounded in the assumption that conflict exists in all organizations. However, it is possible that studying the SAVE organization during a particularly turbulent time uncovered conflicts that would not have surfaced if this strategic planning effort were conducted during a more stable time. Either way, the tensions that emerged were not viewed as problems to be solved but rather as moments of possibility for SAVE. Approaching these tensions from a meaning-making and sensemaking perspective, the ways in which SAVE’s strategic actors navigated and responded to tensions create and continuously shape the organization. The conclusion of this study does not mark the resolution of these tensions, and new tensions may arise, as the organization continues to construct its future.

Presentation of Findings across Three Tensions

These three tensions that emerged during this study include tensions include (1) tensions in the transition from top-down to more inclusive strategic planning; (2) tensions between conflict and mutual engagement; and (3) tensions in the relationship between practitioners and strategic objects in creating meaning. Tensions arise as organization actors develop different levels of understanding and encounter disagreement and contradictions. These tensions can be experienced as uncertainty, stress, and anxiety, as they negotiate perspectives and make decisions related to organization change (Putnam et al., 2016). Rather than mitigating tensions, this strategic planning processes created opportunities for recognizing and exploring the tensions as a means to make better decisions, improve relationships, and navigate organization complexities (Mease, 2019).

Tensions in the transition from top-down to more inclusive strategic planning

Practitioners are “strategy’s actors” (p. 619), the people who do the work of making, shaping, and executing strategies (Whittington, 2006). Strategy-as-practice research raises questions of who is a strategist, who shapes the construction of strategy for an organization, and how do individuals identify themselves in relation to the strategic activity (Cornelissen & Schildt, 2020; Jarzabkowski, 2005). Attempting to understand how participants negotiate their role in the construction of the strategy for the organization (RQ2), draws attention to who is identified, or self-identifies as, a strategist, and the tools and behaviors they employ to make and shape the organization’s strategy.

The process for developing the strategic plan for SAVE was designed to be inclusive and transparent, far from the typical military strategic planning method. With an organization and board heavily comprised of high-ranking military veterans, a process that invited all levels of the

organization and even external stakeholders to become strategic practitioners was both foreign and challenging. In this process, all participants were invited and encouraged to become strategy actors, making and shaping the construction of strategy for the organization. In military strategic planning, the concept of broadening the definition of strategic actor does not consider stakeholders, partners, and all levels of the organization. A grassroots and inclusive approach may be viewed as too slow, costly, and not capable of advancing the aim of improving national security.

With an invitation for all participants to become strategic actors, the tensions that surfaced are evident in the way participants attempted to negotiate their role in the construction of the strategy for the organization (RQ2). At times during the planning process, two members of the organization's executive leadership attempted to seize control of the planning process. For example, at one point, the board secretary sent an email to all board members seeking feedback on the organization's future priorities. In his email, he requested a vote of priorities and discouraged "reply all" responses. His email was met with concern about how his request fit within the defined strategic planning process. For example, in an email response, Adam stated that the recommendations for the future "will need to take in to consideration the valued commitment of a very diverse group of volunteers." He went on to note, "For some time now, Susan has been doing her due diligence to the process."

Despite recognizing the value of a diversity of perspectives in developing the strategic plan, Adam still expressed discomfort with how the process employed contrasted from typical military strategic planning. Towards the end of the planning process, participants were invited to develop the mission and vision statements for the organization collectively. Adam pushed back on this group effort by stating:

In the military, to get to the mission statement, we would truly have to do a mission analysis to get to our specified and essential tasks. It's just a very specific and methodological approach. I mean, I'm not going to tell us not to do it, but I'm just gonna suggest ... to do justice to this one we would do a SWOT analysis to be able to get to a substantive mission statement or vision.

Building on Adam's comment, Chad later suggested that a select few of the organization's leadership, each of whom are high-ranking military retired veterans, be tasked with the development of the mission and vision statements. Edward pushed back on this approach stating that "reforming the mission statement in a small group feels too Machiavellian."

The meaning-making practice of *naming* was frequently employed as a way to reinforce an appreciation for military structure and the common experience of those SAVE members with a military history. Naming something puts it in context and relationship to other things and emphasizes certain characteristics (Drath & Palus, 1994). For example, during a heated discussion at a board meeting, Adam called on the military term "nesting" to characterize the importance of adhering to a chain of command.

From a military planning standpoint, I think all the military folks on here understand the essence of nesting, you know the fractionalization that's going on, I think it's critically important that we all kind of take a step back and get out of the emotional space and understand where we fit in the nesting domain for what we're trying to accomplish.

The concept of nesting is to carry the top commander's intentions and priorities to the lowest levels (DuPuy, 1988). Like mixing bowls of various sizes where the smallest bowls fit within the next largest, nesting ensures the lowest order fits within the "confines of the larger and accommodates the next smaller and so on down the squad, the tank, and the brave soldier

himself” (p. 417). By naming the experience “nesting,” Adam is attempting to bring sense to the Board “fractualization” by calling upon shared military values and commitments. Calling upon military-related vocabulary and concepts was frequently used as a tool to speak to those SAVE members with a military history. Referring to challenges as “major bogeys inside the wire,” staying focused on “mission critical” activities, and using military acronyms may have demonstrated an appreciation for military structure and a shared military experience, but perhaps at the expense of alienating those SAVE members lacking that common background.

The challenge of having a voice in the organization's hierarchy was evident in the perspective shared by Edward when describing previous strategic planning efforts. “I didn’t get included on any of the strategic, business, or financial planning.” He went on to describe the challenge of being heard during meetings, “I have to talk really fast because I’m shut down quickly. I haven’t really been invited to the General’s club when I think that I should have a seat at the table.” Adam echoed the challenge of those without a high-ranking military veteran status being heard by stating, “He’s a 3-star General. He doesn’t look at ‘little people’ like you in the same way.” Adam likened the barrier in communication with upper leadership as the “Palace of Tiryns,” the mythic home of Hercules with high, impenetrable walls.

When reflecting on what may have limited the organization’s success prior to the strategic planning initiative, Andrew shared, “we have been approaching this many times as a military model where we sit around and talk about what needs to be done, and then there’s nobody doing it.” He went on to lament, “we have a board that’s very heavy on military. So we have too many chiefs and not enough Indians.” Edward echoed the struggle of leading a nonprofit differently than military command by noting, “We have a lot of Generals that are used to having unlimited funding and 20,000 people to do whatever you say. When you’re working as

a charitable organization, it's not like the military." These participant reactions and responses illustrate the tension experienced when the facilitation process temporarily suspended the command-and-control decision-making to favor more inclusive participation.

Tensions between conflict and mutual engagement

The participatory process designed for the development of the strategic plan sought to cultivate an understanding of the organization and the participants by what is known as a *community of practice* (Wenger, 1998). More than a group or collective, the process explored how the shared activities of the participants create shared knowledge and shared ways of knowing. As described by Drath and Palus (1994), in a community of practice, "people are united by more than membership in a group or category, they are involved with one another in action" (p. 11). McPhee and Zaug (2005) describe this relationship of members and activity in the four flows of organization communication, particularly *member negotiation* and *activity coordination*. Membership negotiation understands that organizations are comprised of, yet distinct from their members. Membership negotiation occurs through the communication that builds, maintains, and transforms the relationship between the organization and its members (McPhee & Zaug, 2005). Activity coordination operates on the assumption that members are working together to achieve a purpose. Activity coordination answers the question, "what are members doing together to complete the task?" (McPhee & Zaug, 2005; Putnam & Nicotera, 2008). Protocols for focus group, open forum, and the virtual retreat were designed to gain an understanding of the organization, not as a group of aggregate members, but as negotiated and sustained relationships organized around doing things together to advance the organization's mission and purpose.

The mutual engagement of participants characterizes a community of practice. However, mutual engagement does not always suggest uniformity and harmony. With a diversity of perspectives, levels of participation, and sustained interpersonal relationships, tension and disagreement are expected and perhaps productive (Wenger, 1998; Wenger et al., 2002). The practice of strategic planning is itself dynamic, negotiated, and contested (Macpherson & Antonacopoulou, 2013).

SAVE's strategic planning process was marked by tension and disagreement over the mission and vision, who the organization serves, and the role of behavioral health as a programmatic emphasis. As an example of the level of conflict experienced, the organization's founder submitted his resignation the week following the board's retreat citing the "loss of a dream" as the primary reason for stepping down. Later he re-joined the organization only to resign again months later. Acknowledging a growing dissent among members of the organization, Brian encouraged board members during a monthly meeting, "everybody here wants what's best for SAVE. I'd like to see the team be as unified as possible, as we drive towards our collective goal." Echoing Wenger & Snyder's (2000) characterization of a community of practice, the members of SAVE shared a "passion for a joint enterprise" (p. 139), but are challenged by a contested and negotiated understanding of who they are and what they are about.

SAVE's mission and vision

While the organization's original mission and vision are captured in several documents, carrying out that mission and vision in the way it is communicated or enacted by members of the organization appears to be diverse. Mary shared, "the vision needs to be concrete and shared among everybody." Bill described the risk of not having a clear and shared vision by noting, if

“you don't have a clear definition of what you're going to do, you let things just kind of drift.”

Many participants highlighted a diversity of the ways organization's vision and purpose is communicated. Scott explained,

So you have Chad kind of on his note. Mary on her note. Andrew on his note. And then I'm there. And so I noticed that each three of them were just a little bit of different note. And we all need to be on that same note that say, you know what? No matter what that note is. And that's the one we need to be on.

Mary later emphasized the importance of a shared vision when she stated, “that vision is important because it really spins off the rest of it. So we all have to buy in to that vision and understand what its components are and tell the same story. That's a priority.” This priority was echoed during the open forum with organization's stakeholders and partners. When asked what SAVE should not be doing in the future, participants responded, “losing sight of the original vision and mission.”

While participants observed a potential disagreement in the ways the organization's vision, mission, and purpose are communicated and expressed, and concern with a departure from the original vision and mission, the organization's vision was frequently held up as a strength. One stakeholder described the mission as “compelling” while another participant stated the organization's “purpose is solidly good.” Identifying additional opportunities to discover this positive core of the organization and truly co-create a vision, mission, and purpose around which members of the organization can commit became a priority for future steps in the strategic planning process.

Defining who the organization serves

Clearly identifying who is served by an organization is an important component of branding, identity, marketing and outreach, and outlining the organization's strategic direction (Vallaster & von Wallpatch, 2018). Across the interviews, focus group, and open forum, there appeared to be significant alignment that the organization exists to serve military servicemembers and veterans. However, there was some dissention on this topic.

Jeffrey, a veteran and participant in SAVE's programs, shared the following as a strength of the organization:

Mostly it was because a group of veterans, just finding a group of veterans, like-minded people to get together and I mean, I was really missing camaraderie from my days in, and, you know, they kind of offered a little bit of that. Shared experiences. Same learning environment.

Andrew shared his perspective on the value of those shared experiences and camaraderie by stating,

You take a young soldier and they're coming back from their second, maybe even their third, fourth, fifth, or even sixth combat deployment. When they're in uniform they know their role. The team on the left and the right knows their role. Then they come back here to a civilian world and my team suddenly disappears.

He went on to describe why he feels serving veterans through this organization is important. "Some people have asked me why helping rediscover purpose and vision is important, is on the top of my list. It's because I've been a soldier and I've been in combat and I struggled with transitioning." These participant responses indicate an appreciation for their shared experiences as veterans. Understanding the SAVE participants as a community of practice, these stories of common experiences illustrate the type of shared history, repertoires, routines,

language, and ways of doing things that allow them to create meaning of their world (Wenger, 1998; Wenger et al., 2002).

While this shared repertoire is indicative of their mutual engagement and characteristics of a community of practice, there is never full alignment of history and experience. It is the ambiguous space created by that misalignment that allows for the negotiation of meaning (Wenger, 1998). As illustrated in the following examples, participants are still working to understand who the organization serves, reconsidering assumptions and working to define the future characteristics of the organization. During an open forum with stakeholder and partners, one participant expressed concern that the organization is “losing sight of veterans and servicemembers.” As the organization struggles to recruit sufficient numbers to meet their program goals, they have expanded the enrollment opportunities beyond veterans. A few participants expressed concern, trying to make sense of that shift. Scott shared, “we’ve changed our focus from only veterans to everybody. So, whatever I offer to a veteran, I should be able to offer (to everybody), but I’m still going to focus on veterans.” Chad further illustrated this tension by expressing,

I’m all for recruiting veterans. I’m a veteran myself. I love veterans. God bless veterans.

But I would advocate that our primary mission is to produce farmers and ranchers and agribusiness leaders. I don’t care if you’ve got a veteran past or not.

From a sensemaking perspective, participants are seeking to claim who the organization serves through contested cycles of *bracketing*, *labeling*, and *framing* (Weick, 2005). Bracketing occurs when participants identify a point of surprise or confusion from their stream of raw experiences, in this case, who the organization serves (Weick, 2005). Labeling pulls that cue out as a point of reference, drawing attention to and bringing the issue into the process of

sensemaking (Cornelissen & Schildt, 2020). Next, participants search for appropriate frames to help interpret the bracketed cues (Seidl & Werle, 2015). Choosing which frames to apply can be a contested and negotiated process influenced by politics and power, whereby actors may try to convince others of specific frames' appropriateness. As is the case with SAVE, strategic actors “engage in framing activities to mobilize others around a particular point of view” (Kaplan, 2008, p. 730). In the following example, Chad is building an argument for expanding SAVE’s service beyond veterans and seeking to establish the legitimacy of his frame.

I struggle with that because, you know, everybody says, boy, there's a lot of veterans out there that want to be farmers and ranchers. But the way I sort of reconcile that and again, I'll use a picture here [drawing on whiteboard] it's like if this was America and you've got 350 million people. Then inside that you would have veterans. Well, that's a pretty small number. Right? One or two million. And then inside of that, we're targeting a subset of a subset of a subset. We want people who are interested in ag. And oh, by the way, you've got to be interested in an Ag program and in Manhattan or something. Right? So we're targeting our group of potential students that is a subset of a subset of a subset of a subset. Whereas, if we open that up to anybody, we could appeal to a broader student base, logic says we would get more students. We are appealing to a broader student base. We will get more students. So that's not to say that we're not here to help veterans. We certainly are.

The process of bracketing, labeling, and framing can conclude when a collective frame wins out. As described by Kaplan (2008), the predominant collective frames are not “mere aggregations of individual cognitions, but rather a product of a dynamic process of meaning construction” (p. 746). Ultimately, the collective frame of who the organization serves is captured in the following

statement from SAVE's final strategic plan, "Our priority beneficiaries are servicemembers, veterans and their families. As part of G.I. bill eligibility and in the interest of transitioning from service, we are broadening our customers to include all individuals with a passion for agriculture who can benefit from our services." The contested and negotiated process of meaning-making and sensemaking is further illustrated in how participants worked to define the role of behavioral health as a programmatic emphasis.

Therapy and behavioral health

As expressed in SAVE's initial mission statement, offering therapy and facilitating healing are services provided for students and program participants (SAVE, 2016). An aspect of developing the strategic plan included revisiting the current vision and mission to ensure they reflect SAVE's strengths and future direction. Understanding how board members, employees, program participants, and partners describe and view the role of therapy and behavioral health not only informed how this theme was characterized in the strategic plan, it illustrated how participants negotiate meaning (RQ2). This process of negotiation was often contentious as members constructed a sense of what is important to the organization, what they value collectively, and made commitments to future actions (Drath & Palus, 1994, Putnam & Nicotera, 2008).

When asked to reflect on the strengths of the organization, Mary shared, "the best thing ever is we've probably prevented suicides and we've helped people find mission and purpose." She went on to describe times when she was particularly proud to be a part of SAVE when she noted, it was "probably the first person that came to me and said that this has saved my life, or this has changed my life. I found purpose. I no longer have negative thoughts, even thoughts of taking my own life." Several participants shared their personal stories of the impact of SAVE's

therapy programs. Mitch shared, “I should have been six foot in the ground and I’m not. So I can use my experiences and what I’ve learned through this program to help others come through.” John also identified therapy as a strength of the organization, stating, “that’s also something that’s very exceptional with SAVE is that you get the therapy, because it’s helped me advance immensely.” Jeffrey revealed a similar personal impact. “Some of the guys come in and share their stories about how they were depressed and down. I have PTSD, they had PTSD – you know, shared experiences.” He went on to share that SAVE is unique from other opportunities for behavioral health services for veterans.

It’s not the VA Center, the vet center in downtown Manhattan, but it’s what veterans need to be able to share, to have the shared experiences, to be able to express those to get them out so it’s not going to boil over into something worse.

Imagining the future ideal state for SAVE often included descriptions such as a “healing environment” with “holistic treatments.” While mental health and therapy was a common response related to both SAVE’s current strengths and desired future, consensus on how to address behavioral health in the organization was a point of tension. Edward noted that when the topic of mental health is brought up during board meetings, they are “shut down very quickly” suggesting a “resistance or stigma to mental health.” This discomfort with discussing mental health was observed during the board meeting when one board member suggested offering yoga courses led by a trauma-informed yoga instructor. Observing raised eyebrows from other board members, Edward stated, “I feel like I am giving a headache to everyone at that end of the table.” Noting that this is an issue in need of attention if therapy is to be a part of SAVE’s future, he went on to share, “somehow we’ve got to get over that hurdle and everyone needs to get on

board with behavioral health.” Indeed, not all participants appeared to be “on board with behavioral health” as a point of emphasis for SAVE, as illustrated in Chad’s response:

I think therapy is, in my opinion, and I will share the facts with you, in my opinion therapy is a very small piece of what we do. My belief is that we should remain strongly focused on creating and producing farmers and ranchers. I don't want to get into the business of mental health. I don't want to open a hospital or a clinic there. But again, to me, it's a very small percentage of our students actually need that kind of health treatment.

While uncomfortable and in many ways still unresolved, the strategic planning process created the opportunity for dialogue among perspectives and invited different levels of participation, holding true to Weick’s (1995) *law of requisite variety*. The strategic planning process recognized the role of disagreement as a constructive form of activity and participation. Ultimately, the diverse participation led to greater transparency and ideas for improvement. Such diverse participation should result in a greater number of frames, leading to more possibilities for interpretation. However, a greater number of participants does not necessarily equate to the presentation of more frames, especially with unequal levels of power. Framing contests are won either by those with the most convincing argument or by those with the power to influence and create the predominant frame (Kaplan, 2008). As Edward’s lament about having “seat at the table” in the “General’s Club” illustrates, not all frames even make it to the contest.

Tensions in relationship between practitioners and strategic objects in creating meaning

The practical outcome of the engagement with SAVE was the development of a strategic planning document. During the development process, the plan became an active participant with

individuals expressing hope and faith in the text's ability to create change and assigning value in the document's role to build partnerships and improve fundraising. As described by Mailhot et al. (2016), texts have the potential to become part of the material collective whereby, "routines and artifacts (such as formal strategic plans) might help in pulling collaborators together" (p. 57). In this way, the strategic text, while an actual object or material, played a role as a participant in the network that comprised the relationships aimed at addressing the organization's future priorities. From a sensemaking perspective, the strategic text pivots to a role of "sensegiving" and is used to mobilize and legitimize strategic decisions (Gioia & Chittipeddi (1991); Fiss & Zajac, 2006).

Chad described the value of a completed strategic plan as the "opportunity that now finally we have a strategic vision, just fits all in line wonderfully. And so it just feels like we're on a rocket that's about ready to blast off." Following adoption by the board, the strategic plan was added to the organization's website and actively used as part of donor recruitment and in grant applications. When envisioning how the strategic plan may be used, Chad shared the following:

So, what we're gonna do hopefully is take your strategic plan and let's say out of your plan, we want to be the premier agribusiness training facility in the Midwest or whatever. So, then I can take that to 502 [a strategic marketing company] and say, I want to be the premier agribusiness training school in the Midwest and then they can help us market ourselves based on that.

Note that in the example described above, Chad refers to the strategic plan as "your plan," referring to the researcher. Referring to the plan as the researcher's was common early in the data collection and strategic planning process. Only later, after the adoption by the board, did

participants begin describing the plan as owned by SAVE. This speaks to a sense of organizational identity and who owns the work.

In board meetings following the completion of the plan, the CEO and chair routinely pointed to items in the strategic plan when reporting activities and progress. The plan was posted to SAVE's website and used in grant writing, marketing, and soliciting donor support. After serving in the role for several years, the board chairman stepped down to pursue a political position. As the organization deliberated who best to fill the chair position, board members were asked to submit criteria for an effective chair. As reported by James, chair of the nominating committee at a board meeting, top on the list of criteria was a "commitment to implementing the strategic plan." During another meeting, board members were deliberating on the pros and cons of taking on a new project. Chris argued that the new activity might distract from current priorities by noting, "As we move forward, I think it is important that we not forget our strategic plan. It is our plan for the next five years and may be even more important now, so we don't lose sight of our priorities."

SAVE's strategic plan was adopted in July 2020, in the midst of the COVID-19 pandemic. Conditions of the pandemic limited opportunities to recruit students, engage with donors, and implement grant projects, leaving the organization in a dire financial situation. As illustrated in the following exchange between Chris and Brian, the ability to maintain a commitment to the priorities identified in the strategic plan was called into question in the months following the plan adoption. Chris first questioned:

We need to, in response to our financial situation, be clear on what we're doing so when we do have potential donors that we're clear on our message. So, could you clarify that, in the context of our strategic plan? I think it [the strategic plan] makes a real clear plan for

where we're headed, are we putting it on the shelf, for now, because of the financial situation?

Brian assured Chris and board members, “No, we’re not putting anything on the shelf.”

Adam echoed a continued commitment to the approved plan by stating, “I would not abandon the strategic plan, because I think it’s got some good focus and orientation.” Brian discussed the significant financial challenges in light of SAVE’s strategic plan specifically as it related to a discussion as to whether the organization should retain a bee-keeping supply business.

I’ve tried to find a way and the numbers don’t add up. Loving something doesn’t mean that you can afford it, and I think we’re at a really hard point about whether or not SAVE, which the strategic plan does not mention, sells bee equipment.

Brian later referred to the adopted plan and other organization historic documents to build the argument that the bee-keeping supply business may not support SAVE’s purpose and mission. Brian described, “I went all the way back to our foundational documents, we’re going to be a training farm and a place for transition and healing. Period. Dot. That’s it.” This exchange illustrates the role of the strategic text and other organization documents being used to maintain a commitment to established priorities and legitimize prior decisions.

Will this hold true in the coming months and years as the organization works to implement the plan? How will this play out, post-pandemic, as the organization is able to return to hosting students and conducting programming? Will the hardships of the past year be so severe that the organization is unable to recover? That remains to be seen.

Implications

The exploration of sensemaking, meaning-making, and practice perspectives in the development of a strategic plan for the SAVE organization has several theoretical and practical

implications. As described in Chapter 3, high quality research makes a significant contribution conceptually/theoretically, practically, methodologically, or heuristically (Tracy, 2010). The practical, methodological, and theoretical implications of this research are summarized in Table 5.1.

Table 5.1.

Summary of Practical, Methodological and Theoretical Research Implications

	Implications
Conceptual/Theoretical	<ul style="list-style-type: none"> • Addresses a gap in organization management and practice-based literature, specifically for veteran affiliated nonprofits • Extends strategy-as-practice research by looking at the full interplay of strategic practitioners, praxis, practices, and the text • Merges the complimentary concepts and vocabulary of sensemaking, meaning-making, community of practice, and strategy-as-practice to understand an organization's strategic negotiation process
Methodological	<ul style="list-style-type: none"> • Demonstrates a unique example of qualitative data collection, management, and analysis for community-engaged research
Practical	<ul style="list-style-type: none"> • Developed a strategic plan for SAVE to assist the organization in meeting its mission, vision, and future priorities • Provides an example of applying AI to a military veteran organization and offered recommendations for adapting the AI approach to acknowledge and better align with these unique characteristics of a military organization. Recommendations may also be extended to other organizations challenged by issues of hierarchy and power • Offers an example of community-engaged research

From a conceptual and theoretical standpoint, this research contributes to a growing body of practice-based organization studies, research literature that has largely ignored military organizations. Over the past year of engaging more thoroughly in practice-based literature, including participating in quarterly strategy-as-practice reading discussions with researchers from around the world, I have encountered very few studies with military organizations as

subjects. In addition, much of the strategy-as-practice research is international, from Switzerland to New Zealand with far fewer studies in the United States. This study addresses a gap in organization management and practice-based literature, specifically for veteran affiliated nonprofits. This study also contributes an example of strategy-as-practice research in the United States. The application of practice-based organization research to a U.S. military non-profit organization illustrates how such an approach can be useful for understanding how people adopt specific roles, tools, or discourses when engaging in strategic activities. While this study highlighted how members of a veteran service organizations negotiated their role in a participatory process in a command-and-control environment, the findings may not be unique to military organizations. To some extent all organizing and planning activities are challenged by hierarchy, power, and the desire to control outcomes. Accordingly, answers to these practice-based questions will not only address a gap in application to military or veteran service organizations, but they will also complement existing organization literature.

Practice-based research also typically focuses on one or more terms or concepts central to the practice tradition – praxis, practices, and practitioners. The interplay of these terms served as the backbone for understanding how participants negotiated their role in the construction of the strategy for the organization. This study also provided an opportunity to observe how participants made use of a fourth element often underrepresented in practice literature, the strategic text. Understanding the role of the strategic text in inspiring commitment to the organization, motivating change, or legitimizing prior decisions presented another opportunity to extend strategy-as-practice research. This research contributes to practice-oriented research by demonstrating the interconnectedness of all four elements, provides vocabulary to describe how

participants negotiate their role in the construction of strategy and demonstrates the significance of the material text as a strategic actor.

This research built upon several conceptual and theoretical perspectives. Each of these theoretical frameworks are complimentary but are typically held separate in literature. For example, the concepts from sensemaking, meaning-making, and community of practice provide a methodological insight for the need to create opportunities for articulation of diverse perspectives and the space for productive disagreement. Strategy-as-practice provides the opportunity to evaluate how the sensemaking and meaning-making processes are deployed in an organization. However, these four concepts are rarely, if ever, included in combination in literature. This research creates a unique bridge across the complimentary concepts and vocabulary of sensemaking, meaning-making, community of practice, and strategy-as-practice to understand an organization's strategic negotiation process. Creating a bridge across these theories generates new ways to apply the concepts and vocabulary which extends the theories to cover a wider perspective.

From a methodological perspective, this research contributes a unique approach to qualitative data collection, management, and analysis for community-engaged research. Data gathering was accomplished through interviews, a focus group, an open forum, observations, correspondence, review of archival data, and facilitated discussions with the SAVE board. For each of these touchpoints, this study provides detailed protocols that may be adapted for other applications. Due to limitations for in-person gatherings due to COVID-19, a unique approach to facilitating a board retreat following an AI approach was developed for a virtual format. Conducting qualitative research with SAVE required careful consideration for protocols, data management, and the portrayal of the findings in ways that ensure proper and ethical treatment of

potentially vulnerable participants. This research demonstrates a data collection, management, and analysis approach with a community partner that adheres to all Tracy's (2010) eight criteria for high quality qualitative research.

For practitioners, this research provided a framework for a participatory strategic planning process that may be useful for other military veteran service organizations. This study provided an example of using an AI approach for the development of a strategic plan for an organization heavily comprised of high-ranking military veterans. While AI has been applied to many industries, there are very few reports of AI being used as a strategic planning tool in a military setting (Heflin et al., 2016). This study identified a few challenges of the use of AI in such a setting, in particular, the military's rigorous adherence to command-and-control, the value of history, and a focus on problem-based approaches. Rather than simply identifying these challenges, this study offered recommendations for adapting the AI approach (Chapter 4) to acknowledge and better align with these unique characteristics of a military organization.

And finally, this research highlights the tenants of community-engaged research as defined by the Carnegie Community-Engagement Classification in that it was reciprocal, provided mutual benefit, and reflected an exchange of knowledge and resources (Campus Compact, 2020). For SAVE, the benefit is reflected in the practical outcome of this study, the development of a strategic plan. Ultimately, the strategic planning process and strategic plan product will assist the organization in meeting its mission, vision, and future priorities.

Future Research

Two opportunities for future research are directly related to the limitations outlined in Chapter 1. First, this study was delimited to a single nonprofit veteran service organization located in the state of Kansas. However, there are many nonprofit veteran service organizations

throughout the state and nation. In addition, while the approach to strategic planning may be unique to veteran service organizations, the approach has utility for any organization challenged by hierarchy and power. For this reason, future research could follow a similar participatory strategic planning process with other organizations and compare findings related to tensions and the negotiation of meaning. The second limitation relates to the volume of data generated through this study, including transcripts, meeting minutes, correspondence, and historical reports. Respecting that this data was collected with informed consent from the participants, some of the information collected may be valuable for extending the research. For example, suppose the organization were to revisit their strategic plan in five years. In that case, the data collected during the development of SAVE's 2020 strategic plan could serve as a comparison and measurement of organization change.

The participatory process designed to develop SAVE's strategic plan was built around the AI 4-D cycle – Discovery, Dream, Design, and Destiny. Through interviews, focus group, open forum, and virtual board retreat, this study engaged in each of the 4-D phases. However, the final phase, Destiny, is intended to be enduring. In this phase, appreciative learning becomes part of the organization's culture. The organization continues to work together to move the organization closer and closer to the ideal they created in the Dream phase. Future research could take a longer-term view and assess if and how the organization focuses on positive and collaborative movement towards their ideal future. Are the guiding principles of AI sustainable when an organization returns to everyday operations following a strategic planning initiative?

Finally, an aspect of the design of the participatory process for developing SAVE's strategic plan considered opportunities to cultivate a community of practice. From an organization and strategic planning perspective, cultivating such a community of practice

promotes collaboration around shared goals and improves decision-making. In this study, understanding SAVE as a community of practice laid the groundwork for observing and understanding both sensemaking and meaning-making in the organization and throughout the strategic planning process. While multiple perspectives were invited to participate in the strategic planning process, from stakeholders to employees to the CEO, power and a commitment to command-and-control may have dampened the true appearance of Weick's requisite variety. This finding opens the opportunity for future research that may evaluate an organization's existing capacity for sensemaking and how a planning process may be designed to expand that capacity to account for issues of power.

Summary

This chapter presented the study findings across the research questions. The findings overlapped and intersected three tensions that emerged during the study (1) tensions in the transition from top-down to more inclusive strategic planning; (2) tensions between conflict and mutual engagement; and (3) tensions in the relationship between practitioners and strategic objects in creating meaning. While the findings were not presented sequentially by research question, this chapter did briefly respond to each of the questions. This study opened the possibility for several areas of future research from applying a similar participatory strategic planning process with other organizations to studying an organizations capacity for sensemaking.

This study's purpose was to explore the successes and challenges of a veteran service nonprofit organization through an AI process to inform the organization's future priorities and direction. This research brought to light the ways members of an organization negotiate roles and navigate tensions in the construction of strategy, as well as the function of the strategic text in inspiring commitment and motivating change.

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Appendix A - Institutional Review Board (IRB)

Figure A.1

IRB Approval for Proposal Number 10011

KANSAS STATE
University Research Compliance Office

TO: Dr. Brandon Kliewer
School of Leadership Studies
Leadership Studies Building

Proposal Number: 10011

FROM: Rick Scheidt, C
Committee on Research Involving Human Subjects

DATE: 01/07/2020

RE: Proposal Entitled, "Servicemember Agricultural Vocation Education (SAVE)
Strategic Planning Process"

The Committee on Research Involving Human Subjects / Institutional Review Board (IRB) for Kansas State University has reviewed the proposal identified above and has determined that it is EXEMPT from further IRB review. This exemption applies only to the proposal - as written — and currently on file with the IRB. Any change potentially affecting human subjects must be approved by the IRB prior to implementation and may disqualify the proposal from exemption.

Based upon information provided to the IRB, this activity is exempt under the criteria set forth in the Federal Policy for the Protection of Human Subjects, 45 CFR "6.101, paragraph b, category: 2, subsection: ii.

Certain research is exempt from the requirements of \AA E-IS/OHRP regulations. A determination that research is exempt does not imply that investigators have no ethical responsibilities to subjects in such research; it means only that the regulatory requirements related to IRB review, informed consent, and assurance of compliance do not apply to the research.

Any unanticipated problems involving risk to subjects or to others must be reported immediately to the Chair of the Committee on Research Involving Human Subjects, the University Research Compliance Office, and if the subjects are KSÜ students, to the Director of the Student Health Center.

Figure A.2

IRB Approval for Minor Modification to Proposal Number 10011



TO: Dr. Brandon Kliewer
School of Leadership Studies
Leadership Studies Building

A handwritten signature in black ink, consisting of a stylized 'S' followed by a horizontal line.

Committee on Research Involving Human Subjects

DATE: 09/25/2020

RE: Proposal #10011.1, entitled "Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process."

A MINOR MODIFICATION OF PREVIOUSLY APPROVED PROPOSAL #10011,
ENTITLED, "Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process"

The Committee on Research Involving Human Subjects at Kansas State University has approved the proposal identified above as a minor modification of a previously approved proposal, and has

determined that it is exempt from further review. This exemption applies only to the most recent proposal currently on file with the IRB. Any additional changes affecting human subjects must be approved by the IRB prior to implementation and may disqualify the proposal from exemption.

Unanticipated adverse events or problems involving risk to subjects or to others must be reported immediately to the IRB Chair, and / or the URCO.

It is important that your human subjects project is consistent with submissions to funding/contract entities. It is your responsibility to initiate notification procedures to any funding/contract entity of changes in your project that affects the use of human subjects.

Appendix B - Informed Consent Form

Thank you for participating in the process to develop a strategic plan for the Servicemember Agricultural Vocation Education (SAVE) organization.

Purpose of the Research

The purpose of this study is to explore the successes and challenges of the Servicemember Agricultural Vocation Education (SAVE) organization through an Appreciative Inquiry (AI) process to inform the organization's future priorities and direction.

Expected Duration of Participation

The expected duration of your total participation is estimated to be no more than three hours.

Description of Procedures

During the process, you will engage in a series of questions, dialogue, and discussions related to the programs, priorities, and overall purpose of SAVE.

Statement of Voluntary Participation

Terms of participation: I understand that my participation contributes to a research project, and that my participation is voluntary. In addition to a research project, data collected from associated processes will be used to create strategic planning documents for SAVE. Refusal to participate will involve no penalty or loss of benefits to which I am otherwise entitled. I also understand that if I decide to participate in this study, I may withdraw my consent at any time, and stop participating at any time without explanation, penalty, or loss of benefits to which I may otherwise be entitled.

Risks or Discomforts Anticipated

There are no foreseeable risks or discomforts from the study.

Benefits Anticipated

Participants in this research may reasonably expect the benefit that comes from sharing experiences and ideas to help advance the work of a community organization with whom they are engaged. Participants may assist in the development of a strategic plan that will advance the work of SAVE. Participants may benefit from the services delivered from an organization with a clear and focused strategic plan.

Extent of Confidentiality

While complete confidentiality is not feasible in an open forum or focus group setting, all personal feedback and survey responses will be reported without identifying the source of the

contributor. Since information gained from open forums, focus groups, and interviews may be published in peer-reviewed journals, we offer this information and opportunity to provide or withhold your consent to participate.

I verify that my signature below indicates that I have read and understand this consent form, and willingly agree to participate in this study under the terms described, and that my signature acknowledges that I have received a signed and dated copy of this consent form.

PARTICIPANT NAME:

PARTICIPANT
SIGNATURE:

WITNESS TO
SIGNATURE: (PROJECT
STAFF)

DATE:

DATE:

If you have questions: The community-engaged scholar running the study is Susan Metzger. Please ask any questions you might have now. If you have questions later, please contact Susan Metzger at smetzger@ksu.edu or 785-532-5728. If you have any questions or concerns regarding your rights as a participant in this program or impact study, you may contact the Institutional Review Board for Human Participants (IRB) at <https://www.k-state/comply/irb>, comply@k-state.edu, 785-532-3224. This project is IRB 10011

Appendix C - Protocols

Interview Protocol

Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process

The interviewer will follow a standard protocol for each session that includes:

- Welcome and opening remarks
- Informed consent form review
- Question and answer period
- Wrap-up

Welcome and opening remarks

Welcome, and thank you for being here today to share with me your thoughts and opinions regarding the Servicemember Agricultural Vocation Education (SAVE) organization.

I am Susan Metzger, and I appreciate you sharing your time and thoughts with me today. We are going to focus our discussion today on your experiences as (an employee, a volunteer, a partner) with SAVE. My task is to keep our conversation going, and to keep us on time.

Informed consent form review

[Hand each interviewee an informed consent form] Remind interviewee that they received the consent form in the email inviting them to participate in the interview. Ask them to take a moment to review. Solicit questions and comments and address any concerns. *[Collect consent forms; provide a blank copy for their records if requested.]*

Introductions

Ask interviewee to share their name and how they are affiliated with SAVE.

Question and answer period

- Describe an experience when you observed SAVE at its best, delivering what you consider to be its core mission.
- What is it that SAVE is doing here and now that makes you particularly proud?
- What does SAVE and, by association, the Golden Prairie Honey Farm do exceptionally well?
- What do you see as SAVE's weaknesses or areas of needed improvement?
- What are the critical issues that SAVE needs to face over the next five years?
- Looking ahead in the next five years, what does your ideal future look like for SAVE?
- What do you see as the key priorities SAVE should establish in its strategic plan?

Wrap-up

[Handout business cards] We are now at the end of the interview questions. I want to sincerely thank you for your time and input. In you have any questions or final comments, please feel free to email them to me following this interview.

Thank you.

Focus Group Protocol

Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process

The Focus Group moderator will follow a standard protocol for each session that includes:

- Welcome and opening remarks
- Informed consent form review
- Establish guidelines
- Question and answer period
- Wrap-up

Welcome and opening remarks (3 minutes)

Welcome, and thank you all for being here today to share with us your thoughts and opinions regarding the Servicemember Agricultural Vocation Education (SAVE) organization.

I am Susan Metzger, and I will facilitate our discussion group this evening. We are going to focus our discussion today on your experiences as (an employee, a volunteer, a partner) with SAVE. My task is to keep our conversation going, and to keep us on time.

Informed consent form review (2 minutes)

[Hand each person an informed consent form] Remind group members that they received the consent form in the email inviting them to participate in the focus group. Ask them to take a moment to review. Solicit questions and comments and address any concerns. *[Collect consent forms; provide a blank copy for their records if requested.]*

Establish guidelines (5 minutes)

The following guidelines will be written on a flip chart or projected to a screen. Participants will be asked to review the guidelines.

- We want an atmosphere of respect for everyone's opinions, and where everyone has a chance to speak. Let's talk one at a time and speak loud and clear.
- We would like to spend no more than 90 minutes in this focus group meeting. We will offer questions to generate discussion, but also will leave time for your suggestions. This may cause me to occasionally interrupt you to keep the discussion focused and on track.
- We ask you to please be as honest with us as you can when answering questions.
- There are no right or wrong responses to the questions; we just want your thoughts and opinions.
- If you have a question about the process at any time, please do not hesitate to stop and ask questions.
- Please silence or turn off all electronic devices. We sincerely appreciate your attention to this focus group.
- We request that everyone respect the group by not repeating what is said during

- this focus group outside of this experience.
- This discussion will be recorded with a digital audio recording device to ensure we capture all of your thoughts and suggestions. We will not link your identity to any of your comments.
 - Lastly, you do not have to answer any questions you do not want to and you can stop your participation at any time if you feel uncomfortable.

Introductions (10 minutes)

Self-introductions will be made. Each participant is prompted to share their name and how they are affiliated with SAVE.

Question and answer period

Flip Chart (10 minutes)

What does SAVE and, by association, the Golden Prairie Honey Farm do exceptionally well? [Ask each participant to write words that describes their response to this question on the flip chart. Reflect on responses]

Pair and Share (7 minutes)

Describe an experience when you observed SAVE at its best, delivering what you consider to be its core mission. [Pair participants in groups of 2 or 3, ask each to share with each other their experience. Report out from group, sharing an experience and highlighting commonalities]

Roundtable Discussion (10 minutes)

What is it that SAVE is doing here and now that makes you particularly proud?

Flip Chart (10 minutes)

What do you see as SAVE's weaknesses or areas of needed improvement? [ask each participant to write words that describes their response to this question on the flip chart. Reflect on responses]

Roundtable Discussion (10 minutes)

What are the critical issues that SAVE needs to face over the next five years?

Notecards (10 minutes)

Looking ahead in the next five years, what does your ideal future look like for SAVE? [Ask each participant to describe or draw what SAVE's ideal future looks like in five years]

Open Discussion (10 minutes)

What do you see as the key priorities SAVE should establish in its strategic plan?

Wrap-up (5 minutes)

[Handout note cards] We are now at the end of the focus group questions. I want to sincerely thank you for your time and input. If you have any questions or final comments, please feel free to share them now. I also invite you to add any comments or thoughts on the note cards that you would like to leave behind.

Thank you.

Open Forum Protocol

Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process

Partners and stakeholders of the SAVE organization are invited to participate in an Open Forum to share feedback and ideas to inform SAVE's strategic plan.

The moderator will follow a standard protocol for this session that includes:

- Welcome and opening remarks
- Informed consent form review
- Establish guidelines
- Discussion
- Wrap-up

Welcome and opening remarks (5 minutes)

Welcome, and thank you all for being here today to share with us your thoughts and opinions regarding the Servicemember Agricultural Vocation Education (SAVE) organization.

I am Susan Metzger, and I will facilitate our discussion group this afternoon. We are going to focus our discussion today on two items – the outcomes of the USDA BFRDP grant and an activity related to the development of the Strategic Plan. I am joined today by Amy Mattison and Mike Miller from K-State's Office of Educational Innovation and Education (OEIE). K-State OEIE is a subcontractor on the USDA BFRDP grant to provide a third-party assessment. The feedback collected today will assist in that assessment.

Informed consent form review (3 minutes)

[Hand each person an informed consent form] Remind group members that they received the consent form in the email inviting them to participate in the open forum. Ask them to take a moment to review. Solicit questions and comments and address any concerns. *[Collect consent forms; provide a blank copy for their records if requested.]*

Establish guidelines (3 minutes)

The following guidelines will be written on a flip chart or projected to a screen. Participants will be asked to review the guidelines.

- We want an atmosphere of respect for everyone's opinions, and where everyone has a chance to speak. Let's talk one at a time and speak loud and clear.
- We would like to spend no more than 2 hours and 30 minutes in this open forum (including lunch break). We will offer questions to generate discussion, but also will leave time for your suggestions. This may cause me to occasionally interrupt you to keep the discussion focused and on track.
- We ask you to please be as honest with us as you can when answering questions.
- There are no right or wrong responses to the questions; we just want your thoughts and opinions.

- If you have a question about the process at any time, please do not hesitate to stop and ask questions.
- Please silence or turn off all electronic devices. We sincerely appreciate your attention to this discussion.
- We request that everyone respect the group by not repeating what is said during this forum outside of this experience.
- This discussion will be recorded through typed notes and the writing you submitted prior to the board meeting. We will not link your identity to any of your comments.
- Lastly, you do not have to answer any questions you do not want to and you can stop your participation at any time if you feel uncomfortable.

Introductions (10 minutes)

Ask participants to briefly introduce themselves and share how they are connected with SAVE.

[Capture introductions in a Word document]

Review SAVE's Current Vision and Mission Statements (5 minutes)

Project Save's currently expressed vision and mission statements and review with participants. Discuss that with the development of a Strategic Plan, the current vision and mission for SAVE is also being reimagined.

PollEverywhere.com Discussion (5 minutes)

Which of the following areas is SAVE best suited to address:

- Addressing the agricultural workforce demand
- Informing transitioning servicemembers of career alternatives
- Offering agricultural training to veterans and transitioning servicemembers
- Assisting those with visible and invisible combat wounds with therapy and care
- Providing a local source for beekeeping supplies and training

Reflect on responses.

Open Discussion (10 minutes)

[Responses will be captured both in a Word document, as well as with a scribe on a Flip Chart]

What do you consider to be the strengths of SAVE?

What do you consider to be SAVE's weaknesses or areas to be improved upon?

Round the Room Flip Chart Responses (15 minutes)

Invite participants to visit the flip charts throughout the room and add their feedback.

Flip Chart Survey

Place each of the following prompts on a separate flip chart and ask participants to mark their level of agreement with the statements. Each participant will be provided markers and three colored stickers.

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
SAVE's mission is realistic in light of its resources					
SAVE delivers valuable programs and activities to its constituents and partners					
SAVE engages routinely and meaningfully with stakeholders and partners					

Flip Charts – Single Questions

What are the most important services SAVE should provide in the next five years?

What makes SAVE unique?

What should SAVE not be doing?

Lunch (25 minutes)

Invite participants to grab lunch and return to the meeting room. While eating, reflect on responses to flip charts and initiate open discussion.

[Discussion will be captured in a Word document]

Open Discussion (15 minutes)

[Responses will be captured both in a Word document, as well as with a scribe on a Flip Chart]

Discussion Question #1:

Looking ahead to 2025, five years from now, how do you envision the SAVE organization?
(Additional prompt: How are we different or the same as today?)

Discussion Question #2:

With this future vision, what assets can you bring to the table to help SAVE achieve this vision?
(Additional prompts: What role can you imagine as a partner or stakeholder with SAVE? What relationship is necessary to achieve the described future vision?)

Wrap-up (5 minutes)

[Handout note cards] We are now at the end of the Open Forum. I want to sincerely thank you for your time and input. In you have any questions or final comments, please feel free to share them now. I also invite you to add any comments or thoughts on the note cards that you would like to leave behind.

Thank you.

Board Interaction Protocol

Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process

The SAVE Board is scheduled to meet on February 27th at 1:30pm. Approximately 20-minutes of the Board meeting agenda is devoted to a review of the USDA Beginning Farmer and Rancher Development Program (BFRDP) grant and an activity related to the Strategic Planning Process.

The moderator will follow a standard protocol for this session that includes:

- Welcome and opening remarks
- Informed consent form review
- Review of BFRDP grant outcomes
- Blue Sky Visioning activity
- Wrap-up

Welcome and opening remarks (1 minute)

Welcome, and thank you all for being here today to share with us your thoughts and opinions regarding the Servicemember Agricultural Vocation Education (SAVE) organization.

I am Susan Metzger, and I will facilitate our discussion group this afternoon. We are going to focus our discussion today on two items – the outcomes of the USDA BFRDP grant and an activity related to the development of the Strategic Plan. I am joined today by Amy Mattison and Mike Miller from K-State's Office of Educational Innovation and Evaluation (OEIE). K-State OEIE is a subcontractor on the USDA BFRDP grant to provide a third-party assessment. The feedback collected today will assist in that assessment.

Informed consent form review (1 minute)

[Hand each person an informed consent form] Remind group members that they received the consent form in the email inviting them to participate in this agenda item for the board meeting. Ask them to take a moment to review. Solicit questions and comments and address any concerns. *[Collect consent forms; provide a blank copy for their records if requested.]*

Establish guidelines (1 minutes)

The following guidelines will be written on a flip chart or projected to a screen. Participants will be asked to review the guidelines.

- We want an atmosphere of respect for everyone's opinions, and where everyone has a chance to speak. Let's talk one at a time and speak loud and clear.
- We would like to spend no more than 20 minutes in this agenda item. We will offer questions to generate discussion, but also will leave time for your suggestions. This may cause me to occasionally interrupt you to keep the discussion focused and on track.
- We ask you to please be as honest with us as you can when answering questions.
- There are no right or wrong responses to the questions; we just want your

- thoughts and opinions.
- If you have a question about the process at any time, please do not hesitate to stop and ask questions.
 - Please silence or turn off all electronic devices. We sincerely appreciate your attention to this meeting and agenda item.
 - This discussion will be recorded through typed notes and the writing you submitted prior to the board meeting. We will not link your identity to any of your comments.
 - Lastly, you do not have to answer any questions you do not want to and you can stop your participation at any time if you feel uncomfortable.

Review of USDA BFRDP Grant Outcomes (7 minutes)

Project table summarizing the projected and actual outcomes of the grant. Ask participants for reflections on the outcomes.

Blue Sky Visioning Activity (10 minutes)

Board members were provided with the following prompt via email two weeks prior to the scheduled Board meeting:

It is May 2025 and you are attending a ceremony to celebrate SAVE's accomplishments and to recognize the volunteers and program participants who helped SAVE reach this milestone. A reporter from WIBW asks you to summarize the purpose of the celebration and SAVE's achievements.

In 200 words or less, please provide your response. Do not worry about spelling or grammar. Be as descriptive as possible. Please email your response to Susan Metzger at smetzger@ksu.edu no later than Tuesday, February 25th by 5:00pm.

During the board meeting, project on screen highlights from submissions, summarize common themes, and seek reflections from the Board members.

Wrap-up

We are now at the end of this brief activity to inform both the assessment of the USDA BFRDP grant and the SAVE Strategic Plan. I want to sincerely thank you for your time and input. In you have any questions or final comments, please feel free to share them now.

Thank you.

Board Retreat Protocol

Servicemember Agricultural Vocation Education (SAVE) Strategic Planning Process

The SAVE Board is looking to schedule a retreat in May 2020 as one of the final touchpoints towards developing a strategic plan. Due to the COVID-19 pandemic, the retreat will be conducted remotely through a variety of virtual workshop tools. The following session is designed to take place over a 2-hour time period.

Virtual tools:

- Zoom
- Mural

Goals for Board Retreat

- Introduce activities that engage all four phases (4-D) of the Appreciative Inquiry process
- Surface tensions and navigate difference in an effort to create common understanding and future goals
- Co-create a Vision and Mission statement
- Continue to gain understanding of participants experiences and roles in the organization

The moderator will follow a standard protocol for this session that includes:

- Welcome and opening remarks
- Informed consent form review
- Establish Guidelines
- Strength-Based Icebreaker – Root Causes for Success
- Activity #1 - SAVE's Ideal Future
- Activity #2 – Opportunities and Losses
- Activity #3 – Advertisements for Change
- Creating a common vision and mission
- Reflections on the Day
- Wrap-up

Pre-Retreat Activities

A recorded presentation of the summary of information gathering to date will be provided to all participants. This presentation will highlight the process, purpose, and key findings from interviews, focus group, open forum, and other board engagement activities.

Prior to the workshop, ask participants to send a photo of one of their favorite SAVE memories or activities. The photo should represent a high point or peak experience and illustrate a time when you felt most alive and engaged in the organization.

Prior to workshop, each participant will receive an email (see below) with instructions for using the virtual workshop tools. Included with the introductory email will be a brief exercise to allow participants to become familiar with the tools.

Email sent to participants three weeks prior to retreat:

SAVE Board members and partners,

I am looking forward to working with you during the Board Retreat on [DATE]. Due to the impact of the COVID-19 pandemic on face-to-face activities for the university, we will conduct this retreat virtually. The “hands-on” (via mouse, keyboard, and video) session is scheduled to last no more than 2 hours and is the final phase of information collecting to develop SAVE’s strategic plan.

We will make use of two virtual collaboration tools – Zoom.com and MURAL. Many of you have become familiar with Zoom over the past few weeks, but MURAL is likely a new tool to you.

Before the session, please take some time to complete the following steps. This is important! Completing these steps will ensure we can start on time and have the most productive retreat possible.

1. Install [Chrome](#) or [Firefox](#) for the best experience.
2. Watch this brief (12 minutes) tutorial highlighting the features of Zoom and MURAL that we will use during the retreat. (Password = SAVETechno_2020)

https://ksu.zoom.us/rec/share/w4tac-DZrk9OSYWdzB75HbcEON7hT6a8lykb_PYOmRmmXv-HBBWUjxx2D0VBOGze?startTime=1587587311000

3. Join the SAVE Board Retreat workspace room. You will receive a separate email inviting you to this workspace. Registration is quick and free.
4. Complete the following MURAL pre-work activity.

[Insert individual links]

5. Find a photo or graphic that represents a time when you felt most proud of your engagement with SAVE. Email the photo to me at smetzger@ksu.edu no later than May 23rd.

6. Optional: If you were unable to attend the March board meeting or would like to review the information again, linked below is a recorded presentation (19 minutes) summarizing the information collected through interviews, focus groups, and an open forum for the strategic plan. (Password = SAVEStrategy_2020).

https://ksu.zoom.us/rec/share/28V2c5TAx21LWp2KzVjQHaf8D9TnX6a81SIX__IOzhzEjxVyWgTugVUYO6e0urN9?startTime=1587562971000

Your input and ideas are critically important to the development of SAVE's strategic plan and to the future success of the organization. Thank you for preparing for our time together. If you have any questions, I can be reached via email at smetzger@ksu.edu or via phone at (785) 341-5432.

I look forward to seeing you on-line on Thursday, May 28th at 9:30am.

Welcome and opening remarks (5 minutes)

Welcome, and thank you all for being here today to share with us your thoughts and opinions regarding the Servicemember Agricultural Vocation Education (SAVE) organization.

I am Susan Metzger, and I will facilitate our discussion group this afternoon.

Briefly describe format for the retreat and provide a brief orientation to the virtual tools that will be used.

Informed consent form review (2 minutes)

Remind group members that they received the consent form in the email inviting them to participate in this board retreat. Solicit questions and comments and address any concerns.

Establish guidelines (5 minutes)

The following guidelines will be included on the Mural space and projected on the screen. Participants will be asked to review the guidelines.

- We want an atmosphere of respect for everyone's opinions, where everyone has a chance to speak. Let's talk one at a time and speak loud and clear.
- To reduce strain on bandwidth and distractions, we recommend turning off your video and muting your microphone. When speaking, please unmute your microphone. Occasionally, you will be prompted to turn on your video so that we can create an in-person collaboration as much as feasible in a virtual setting.
- This retreat is designed to take place in one morning. We will offer questions to generate discussion, but also will leave time for your suggestions. This may cause me to occasionally interrupt you to keep the discussion focused and on track.
- We ask you to please be as honest with us as you can when answering questions.
- There are no right or wrong responses to the questions; we just want your thoughts and opinions.
- If you have a question about the process at any time, please do not hesitate to stop and ask questions.

- Please silence or turn off any electronic devices not associated with this virtual retreat. We sincerely appreciate your attention to this retreat.
- This discussion will be recorded through Zoom, written notes to Mural, and the Chat feature. We will not link your identity to any of your comments.
- Lastly, you do not have to answer any questions you do not want to and you can stop your participation at any time if you feel uncomfortable.

Ask the participants if anyone would like to add any additional ground rule? Ask if everyone is comfortable with me enforcing these ground rules throughout the retreat?

Strength-Based Icebreaker – Root Causes for Success (20 minutes)

Prior to the workshop, ask participants to send a photo of one of their favorite SAVE memories or activities. The photo should represent a high point or peak experience and illustrate a time when you felt most alive and engaged in the organization.

Pin the photos to a collaboration space and prompt each participants to briefly share why they selected the photo.

Why Appreciative Inquiry? (Available for reference)

If questions or comments arise about the process and the role of Appreciative Inquiry, facilitator may share a brief overview highlighting the 4-D process of Appreciative Inquiry and the Five Guiding Principles.

Activity #1 - SAVE's Ideal Future (25 minutes)

Drawing on input from participants in interviews, focus group, open forum, and the Blue Sky Visioning activity, an image of SAVE's ideal future will be displayed. The image will include items such as classrooms, research center, chapel, dining center, and housing.

Participants will be invited to vote for their top 4 items that they would include in their vision of SAVE's ideal future. Results of the polling will be shared with participants and each participant will be asked to identify one of the items from their top 4 and asked to briefly describe why they selected it and name one specific thing they will commit to doing to make that vision item a reality.

Activity #2 – Opportunities and Losses (30 minutes)

Participants will be randomly assigned to virtual breakout rooms. Prior to assigning breakout rooms, ask each group to self-assign a recorder (someone to write notes) and a reporter (someone who will represent the group and share out when they return). Each breakout room will be assigned a Mural with one of the following statements.

6. SAVE delivers agriculture and agribusiness training to all.
7. SAVE provides integrated behavioral health therapy to participating military servicemembers and veterans.
8. SAVE becomes a primary producer of pure honey.

9. SAVE expands the farmed acreage and geography where training and programs are offered.
10. SAVE courses are delivered virtually.

Each group will describe on sticky notes on their mural the opportunities that will result if the statement is true, as well as the losses that will be experienced.

After 7 minutes in the breakout rooms, participants will switch rooms and have the opportunity to work on another statement for another 7 minutes. After working on two statements, participants will return to common room for report out.

Activity #3 – Advertisements for Change (25 minutes)

Participants are shown six categories that align with weaknesses or areas of improvement that were identified during the interviews, focus group, and open forum. Participants are asked to claim one category for which they would like to create an advertisement for change.

- Teaching and Training
- Sustainable Funding
- Personnel and Human Resources
- Partners and Volunteers
- Communications and Marketing
- Students and Recruitment

The advertisement should highlight an overview of the issue you are working to address and 3-4 specific ways to tackle the issue. These ways should be specific (who, what, when) and should be achievable in the five year timeframe. As participants create their advertisement for change, they will be asked to think about the following three questions:

4. What single small change could we make right now that would have the biggest impact in elevating SAVE's capacity?
5. What bolder change might we want to consider?
6. What will success look like?

Creating a Common Vision and Mission (15 minutes)

SAVE's current mission and vision are displayed on a PowerPoint slide.

Mission/Purpose

To *provide* a training farm with an adjacent clinic, *assist* servicemembers and veterans to transition, to find *purpose* and meaning in life and enable them to learn valuable vocational skills to meet the demand for agricultural ownership, employment, or other advanced schooling. *Facilitate* healing for those in need and *place* those trained on working farms.

Vision

To provide occupational agricultural training and engagement to a significant number of veterans, servicemembers, and family members on a training farm in Kansas. In time a SAVE Farm will exist on all land grant universities.

Share an overview of the definition of mission and vision statements. Include these statements in the chat box as a reminder.

- **Mission/Purpose** - A statement of why the organization exists, at the most meaningful level. It is aspirational, in that it can never be fully achieved. In this way, the purpose states why the organization does the work it does, but does not define how that work is to be done.
- **Vision** - A clear, specific, compelling picture of what the organization will look like at a specific time in the future (one, two, or five years), including those few key metrics that define success. It defines key results achieved and yet to be accomplished, the expected impact to the clients, and it describes specific behaviors that the organization must display to be successful. A clear vision delimits potential strategies; it helps define what's within or outside of the organization's bounds.

Note that as part of the strategic planning process, the current vision and mission may be revisited to ensure they reflect SAVE's strengths and future direction. Using the whiteboard feature in Zoom, invite participants to add ideas for what to retain or change with the current vision and mission.

Reflections on the Day (10 minutes)

Participants are invited to reflect on the process and the information they learned during the retreat. Prompts will include:

- In general, I notice that....
- I am surprised by....
- I wonder...
- Other reflections?

Wrap Up (5 minutes)

We are now at the end of this retreat. I want to sincerely thank you for your time and input. Over the next few weeks, I will be drafting a strategic plan based on the input I've received throughout this process. I look forward to sharing a draft with you and hearing your feedback to improve the final plan. In you have any questions or final comments, please feel free to share them now.

Thank you.

Appendix D - SAVE's Strategic Plan



SERVICEMEMBER AGRICULTURE
VOCATION EDUCATION (SAVE)

2020-2025

STRATEGIC PLAN

DEVELOPED BASED ON INPUT FROM THE MEMBERS AND
STAKEHOLDERS OF THE SAVE ORGANIZATION

REPORT BY SUSAN METZGER

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A WORD FROM THE CEO

To Our Stakeholders:

SAVE has undergone a remarkable evolution in the past five years as we've pursued our vision to serve as a sustainable model for hands-on agribusiness training and integrated behavioral health therapy for veterans and their family members. Offering our unique brand built around four equally strong commitments to our students, community, partners, and the environment we are embarking on the next phase of our journey.

During the next five years, we will improve our financial position, enhance student training and care, improve our academic delivery, implement systems that facilitate better communication with all stakeholders, build an even stronger partner network, and evaluate the impact of our work.

In order to achieve success, we must consistently work to achieve our goals through integrated initiatives that place a high priority on moving us forward on multiple fronts simultaneously and collaboratively. We believe these objectives provide us a clear line of sight toward our vision and create value across the entire organization.

I want to personally thank the many stakeholders who have helped us achieve our past results through their direct engagement and contribution. I ask for your continued support for the next five years as we forge ahead with our groundbreaking mission.

Sincerely,

Craig Bowser



DR. CRAIG BOWSER
CHIEF EXECUTIVE OFFICER

OUR MISSION

*To be a nationally-recognized
farming, ranching and
agribusiness training and
healing program for veterans
and others*

OUR VISION

*To serve as a sustainable model for
hands-on agriculture and
agribusiness training and
education, integrated with
behavioral health therapy, with an
emphasis on servicemembers,
veterans, and their families.*

ENHANCING OUR VISION

Our vision is a clear, specific, compelling picture of what we aim to look like within the next five years. Following are a few key metrics that will define our success. These statements enhance our vision and define key results yet to be accomplished and the specific behaviors we must display to be successful.

SUSTAINABLE MODEL



SAVE expands the geography and acreage where training is offered.
SAVE is self-sustainable.

TRAINING AND EDUCATION



Throughput of 100-200 students per year, per location.
Training and education focus on sustainable and regenerative agricultural practices.
At least 80% of SAVE graduates are still working in an agribusiness-related career five years after program completion.

INTEGRATED BEHAVIORAL HEALTH THERAPY



Provide tangible necessary outcomes for veterans and others struggling with both seen and unseen wounds through therapy and camaraderie.
Provide the opportunity to be an important integral part of a working team.
Integrated therapy may occur through a variety of approaches including behavioral therapy, equine therapy, agricultural or horticultural therapy, apiary therapy, or other opportunities for integrated therapy. We will continue to research and explore the approaches that meet the needs of our students and program participants.



WHO WE ARE

Our values are a visible statement of who we are and what we stand for. They serve as our behavioral compass. We believe that our commitment to live out our values, mission, and vision make us a premier agricultural training organization.

WHO WE SERVE

Our priority beneficiaries are servicemembers, veterans and their families. As part of G.I. bill eligibility and in the interest of transitioning from service, we are broadening our customers to include all individuals with a passion for agriculture who can benefit from our services.

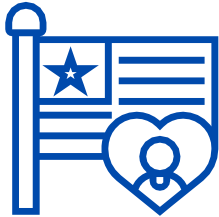
We currently operate in Kansas near the Ft. Riley U.S. Army military installation and Kansas State University. We deliver our services through three primary locations – a business office in downtown Manhattan, KS, a beekeeping supply operation and shop in Manhattan, and a 308-acre farm near Riley, KS. We are working to develop a model for agricultural training that can be employed throughout the United States.



VOCATION / EDUCATION / SALES
SERVICE MEMBER / AGRICULTURE

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OUR STRENGTHS

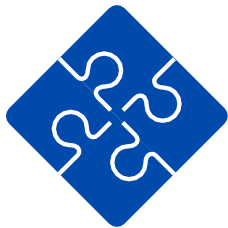


COMPELLING MISSION AND VISION

Our mission and vision are our purpose and a reflection of our culture and values. Our mission and vision are compelling and inspire others to join us.

HANDS-ON TRAINING WITH EXPERIENCED INSTRUCTORS

Our students receive hands-on training from experienced agricultural producers on our own diversified farm – a combination that is one of our key differentiators.



TEAMWORK AND COMMITTED BOARD

Our employees, interns, volunteers, and board members are united in service to each other and to the organization. We are committed to improving the lives of our team members so we can improve the lives of others and the future of farming and ranching.

OPPORTUNITY FOR HEALING

In partnership with Konza Prairie Community Health (FQHC), our program participants have access to services aimed to improve their physical, cognitive, psychological, spiritual, and social well-being. Our unique partnership offers the opportunity to build evidence on the role of farming as an integrated component of a successful behavioral health program. Our programs utilize VA Gold Standard evidence-based treatments that allow us to engage in research and measure outcomes of success.



INDUSTRY SUPPORT

Our partnerships with the agriculture industry allows us to expand our programming and build networks for our students that will enhance their future careers and job placement.

OUR STRENGTHS

“SAVE obviously, the concept of SAVE is exceptional. Training folks, taking folks, helping folks become a valuable member of the agribusiness community in a short period of time.”

“SAVE at its best is the passion and the heart behind it because it's definitely there. And I would say, just from my perspective, the best thing ever is we've probably prevented suicides and we've helped people find mission and purpose.”

“I'm proud thinking about how some of the folks have turned their lives around because of the program and how successful some people are in beginning their agribusiness careers.”

Anonymous quotes from members, participants, and stakeholders of SAVE Organization



OUR CORE VALUES

SERVICE ORIENTED

Effective service puts the needs of our Nation's servicemembers, veterans, the agricultural community, and their families first.

TEAMWORK

When we respect and combine our talents, perspectives, and values into our services, our team has the greatest impact and is most fulfilled.

COMMUNITY PARTNER

Matching our strengths with the assets of others, we can more effectively deliver our programs and serve our communities.

PROGRESS

Focusing on our strengths, we will continuously make progress towards an effective future built on our imagination and innovative purposes.

OUR CORE PROGRAMS AND SERVICES TO DATE

HANDS ON TRAINING

Training and preparing servicemembers and veterans about agriculture. Hands-on experience is provided in both crop production practices and animal husbandry, including planting, harvesting, crop selection, and livestock management practices.

FARM TOURS

Delivering comprehensive, weekly farm tour programs allowing participants to learn about farm business planning and financial management and creating a network with agricultural manufacturers, farm service providers, and food processing organizations.

BEEKEEPING

Operating a model beekeeping training program, in partnership with the University of Montana's Master Beekeeping program. A niche agricultural endeavor, beekeeping is critical to the Nation's food supply and commercial operators are in need of an expanded workforce.

INTERNSHIPS AND APPRENTICESHIPS

Providing internships and connecting aspiring farm owners with experienced mentors to explore succession possibilities and experience hands-on learning in exchange for farm labor activities.

RAISING AWARENESS

Increasing awareness of the behavioral and physical health concerns and the challenges our Nation's servicemembers, veterans, and families experience when transitioning to civilian communities.



HISTORY

The concept of the SAVE organization grew out of a conversation between SAVE's founder and his daughter on October 20, 2012. Drawing on experiences with soldiers at Fort Riley participating in a greenhouse project while receiving therapy, the two envisioned a training farm for veterans and transitioning servicemembers that provided integrated therapy for those suffering from both visible and invisible combat wounds.

The first few years of our organization saw a pilot training project with veterans and soldiers from Fort Riley's Warrior Transition Battalion, development of an initial board structure and bylaws, and official designation as a not-for-profit charitable educational corporation operating under Section 501(c)(3) of the Internal Revenue Service (IRS) code.

Growth and successes of SAVE during our first five years include launching Golden Prairie Honey Farm, a beekeeping supply operation, the award of multiple federal grants, significantly increasing the number of beehive colonies, expanding partners and collaborators, hiring a Chief Executive Officer, and graduating the first cohort from a 40-hour accredited certificate training course. In 2020, SAVE celebrated a significant milestone – the purchase of 308-acres of farmland for future hands-on training.

SERVICEMEMBER AGRICULTURE
VOCATION EDUCATION (SAVE)

2020-2025

OUR HISTORY



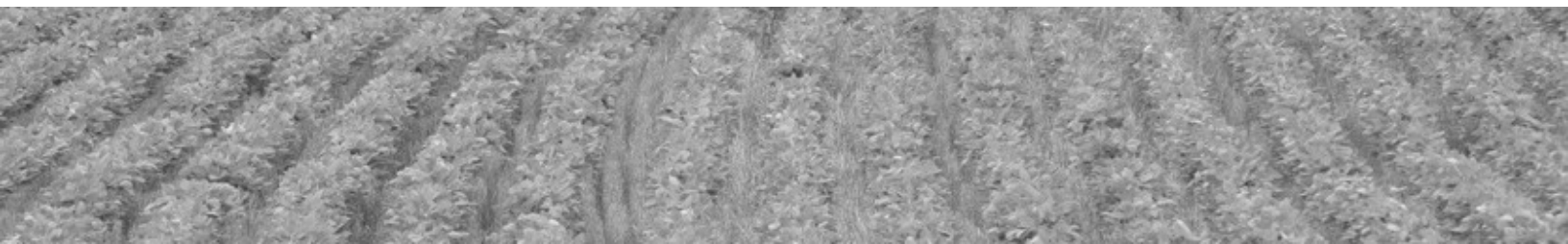
Figure D- 1.

SAVE history timeline

OUR IMPACT

SAVE is a unique intervention with a valuable mission that easily engages community and organizational support. Agricultural education combined with therapeutic support offers a holistic approach to transitioning veterans while at the same time addressing an increasing shortage in the agricultural workforce. SAVE is helping provide a meaningful way of life and potential hands-on healing for hundreds of participants and has the potential to continue its success.

K-State Office of Educational Innovation and Evaluation





467

individuals participating in at least one SAVE class or hands-on training opportunity from 2016-2019

275

individuals including servicemembers and veterans who attended our bee boot camp from 2017-2019

SITUATION & NEED

There are almost 20 million veterans in the United States and most of them live in rural areas. According to the Department of Defense (DoD), nearly 200,000 servicemembers are expected to separate from active duty each year and approximately 1,300 veterans return to civilian life each day.

Many of these veterans and transitioning servicemembers suffer from visible and invisible wounds of war. Approximately 20 percent of the veterans of the conflicts in Iraq and Afghanistan are struggling with behavioral health concerns, such as posttraumatic stress disorder (PTSD), traumatic brain injury (TBI), depression, and substance use disorders. The U.S. Department of Veterans Affairs (VA) reports that approximately 22 veterans die from suicide each day.

On average, U.S. farmers are aging, with more than a third over the age of 65. With many of these farms in the last generation of family ownership, there is a need for a skilled

agricultural workforce to address this farm succession challenge. It is estimated that despite advances in technology, more than one million additional workers are needed to fulfill jobs in agriculture and food production.

According to the Department of Labor, a significant number of existing and transitioning veterans are interested in careers in farming or agriculture related occupations. Many American military veterans come from rural areas. In fact, about 45 percent of returning veterans grew up in rural America and many express a desire to return to those rural communities.

Most American veterans are highly skilled due to their essential military assignments. All that is needed is to compliment those skills with agricultural education to be able to fulfill a vital role - growing our Nation's safe and nourishing food supply.

20M

veterans in the United States, most living in rural areas, many with limited resources and income. About 45% of returning veterans grew up in rural America and many express a desire to return to those rural communities

200,000

servicemembers are expected to separate from active duty each year and approximately 1,300 veterans return to civilian life each day

20%

of the veterans of the conflicts in Iraq and Afghanistan are struggling with behavioral health concerns, such as PTSD, TBI, depression, and substance use disorders

22

veterans die from suicide each day

>1/3

of U.S. farmers are over the age of 65 and many farms are in the last generation of family ownership

1M

additional workers are needed to fulfill jobs in agriculture and food production, despite advances in technology

THE NEXT 5 YEARS

OUR PRIORITIES

We see that there is a significant need for the type of hands-on agricultural training that SAVE provides outside of Kansas. In partnership with other Land Grant Universities, military installations, Federally Qualified Health Centers, and The Nature Conservancy, we are exploring the opportunity to expand our reach nationally by developing and delivering our model in pilot areas in other states.

We remain committed to and focused on our primary beneficiaries – servicemembers, veterans, and their families – but also recognize the need and demand for agricultural training for many others. We are finding more ways for other individuals with an interest in agriculture to access our resources.

Included within the action items identified in each of the following priorities is a demonstrated commitment to empower servicemembers, veterans, and their families seeking a new purpose and transition back into civilian communities through hands-on training in careers in agriculture and agribusiness.

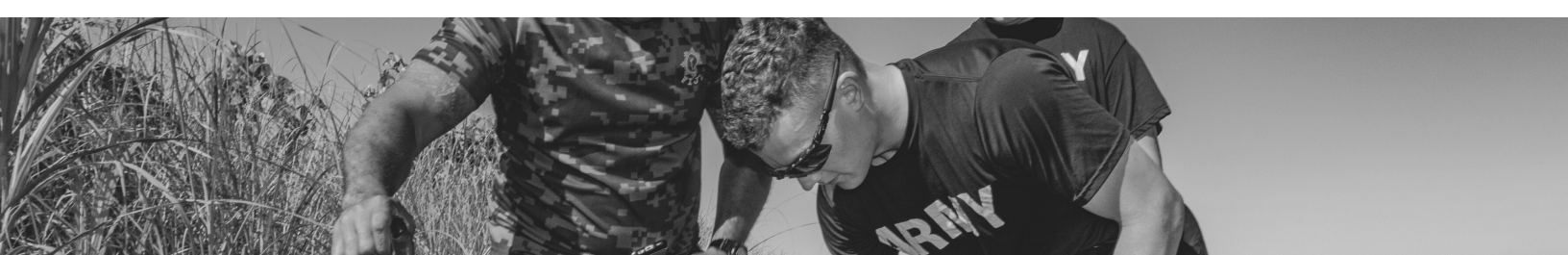
OUR PRIORITIES

- 1 Enhancing student recruitment and focus on student care
- 2 Strengthening our financial and operational capabilities
- 3 Improving our academic instruction and delivery
- 4 Implementing systems to improve internal communication and external marketing and outreach
- 5 Building a partner and volunteer program that focuses on recruiting and retaining new and current partners and volunteers
- 6 Developing clear ways to measure, evaluate, and communicate the impact of our work

ENHANCING STUDENT RECRUITMENT AND FOCUS ON STUDENT CARE

ADDRESSING THIS PRIORITY

- ♦ Focus recruitment and training on our core clientele – servicemembers, veterans, and their families.
- ♦ Leverage local social media and traditional media outlets such as radio and advertisements to significantly expand messaging and recruitment.
- ♦ Develop a comprehensive list of contacts to assist actively with recruitment including SAVE program alumni, the Department of Veterans Affairs (VA), Kansas Department of Labor, Kansas National Guard Public Affairs Office (PAO), Ft. Riley Soldier for Life program, U.S. Department of Agriculture, and more. Continuously add to and maintain recruitment contact list.
- ♦ Identify at least two veteran-focused career transition events and one general agricultural training opportunity fair per year to attend in person and promote our programs.
- ♦ Engage with military and agricultural high school programs including Junior Reserve
- ♦ Officer Training Corps (JROTC) and FFA. Continue to offer all of our program participants access to behavioral health.



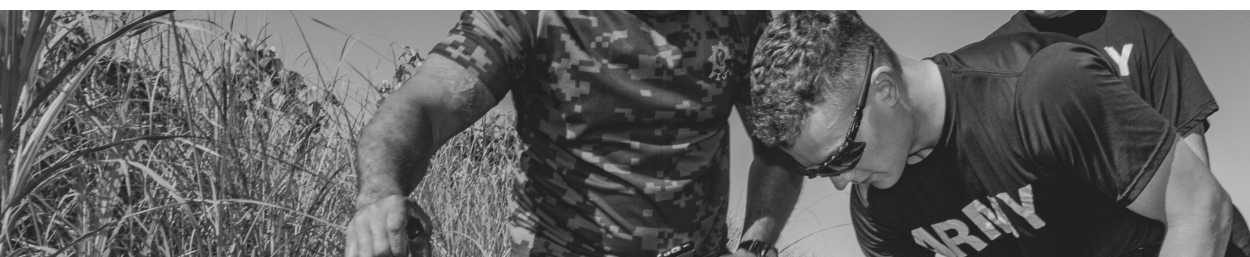
ENHANCING STUDENT RECRUITMENT AND FOCUS ON STUDENT CARE

- ♦ Formalize Academic Program Manager position description of current AmeriCorps VISTA volunteer. Consider permanent paid position to fulfill these responsibilities.
- ♦ Conduct post-graduation interviews with all SAVE program participants to assess organization strengths and identify opportunities for improvement.
- ♦ Engage our program alumni in future student recruitment and as part of the SAVE Ambassador Program.

ADDRESSING THIS PRIORITY

- ♦ Demand for program results in higher number of applicants than admitted students.
- ♦ Program admits 100 students per year.
- ♦ Each student receives personalized care to address housing, transportation, financial aid, and behavioral health to maximize their success in the program. ♦ Students are empowered to successfully transition into agriculture careers, finding purpose and achieving fulfilling lives.

WHAT DOES SUCCESS LOOK LIKE?



STRENGTHENING OUR FINANCIAL AND OPERATIONAL CAPABILITIES

ADDRESSING THIS PRIORITY

- ♦ Continue to monitor and forecast our budget while emphasizing reduced expenditures.
 - ♦ Form and activate a Development Committee comprised of board members and external partners (if necessary). Committee will report at each board meeting and provide a monthly written summary of activities and recommendations to all board members.
 - ♦ Develop a formal Finance and Development plan to accompany this overarching strategic plan. The Finance and Development plan will be revisited by the CEO, in partnership with the Development Committee. Place immediate emphasis on enhanced donor recruitment.
 - ♦ Update SAVE's Business Plan.
 - ♦ Proactively seek federal cost-share and agricultural relief programs such as the Small Business Administration (SBA) Paycheck Protection Program and Emergency Assistance for Livestock (ELAP) payments.
 - ♦ Increase donors of all types, with an emphasis on large-scale donors who give more strategically to their own objectives and in support of our mission.
- Increase and diversify the range of revenue streams to reduce dependency on external grants and to maximize our effectiveness.



STRENGTHENING OUR FINANCIAL AND OPERATIONAL CAPABILITIES

- ♦ Strategically pursue external grant opportunities that leverage our core programs and mission.
- ♦ Build out the sales and services portion of our revenue through commodity and livestock sales from our farm property and Golden Prairie Honey Farm products.
- ♦ Develop a financing and business plan for the acquisition of the Plinsky ranch near Salina, including the costs for land managers, livestock, taxes, and farm inputs, prior to entering into an agreement for the property. Present plan to board for review and approval.
- ♦ Continue the practice of providing routine, detailed treasurer reports to the board to ensure transparency and allow feedback to improve our financial position.
- ♦ Seek board review for all hired personnel and engage board members on hiring committees.
- ♦ Hire a Human Resources Director to oversee personnel recruitment, screening, training, and employee relations.
Develop a plan for the hiring of additional priority personnel including a clinic director and marketing and communications ♦ specialist.

ADDRESSING THIS PRIORITY



STRENGTHENING OUR FINANCIAL AND OPERATIONAL CAPABILITIES

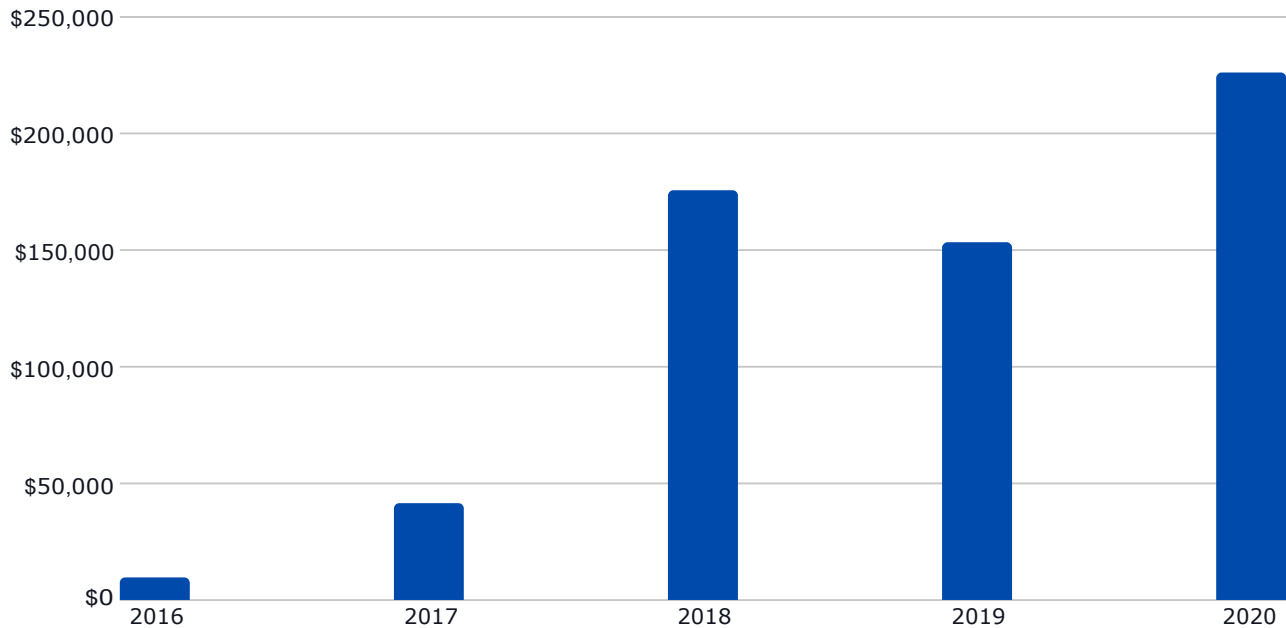
WHAT DOES SUCCESS LOOK LIKE?

- ♦ We have a thriving development strategy with diverse financial resources such as endowments and corporate sponsorships.
- ♦ We meet our 90-day cash reserve goal.
- ♦ We stabilize our employee and volunteer turnover.

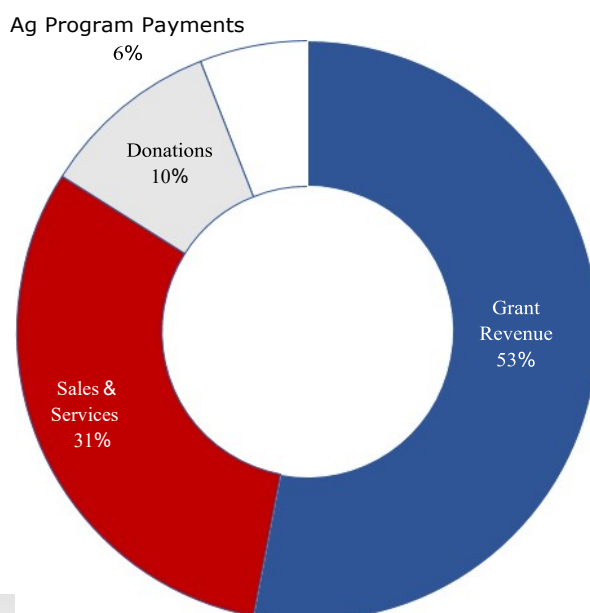


CHAPTER 2 - FINANCIALS

Change in Revenue Since Founding



Revenue Sources, 2020



In 2021, we plan to increase revenues by approximately 10% and maintain a 5% margin. Our goal is to build a 90-day operating cash reserve and shift our revenue mix away from such a reliance on grant programs. We are striving to ensure our programs are self-sustaining after the initial pilot and launch of the honey-bottling program. By 2025, we aim to balance our revenue sources with 50% earned income, 25% public investments, and 25% individual and corporate giving.



IMPROVING OUR ACADEMIC INSTRUCTION AND DELIVERY

ADDRESSING THIS PRIORITY

- ♦ Maintain partnerships with educational institutions such as Cloud County Community College to provide structured classroom curriculum.
- ♦ Maintain partnership with Manhattan Area Technical College (MATC) for access to specialized welding, mechanical, and carpentry training.
- ♦ Provide professional educational training for volunteer instructors to ensure consistent delivery of our curriculum.
- ♦ Reduce dependence on volunteer instructors and increase the number of paid instructors.
- ♦ Uphold our focus on hands-on agricultural training, a key differentiator of our organization, while exploring alternative coursework delivery options.
- ♦ Collaborate with Kansas State University Global Campus and other professional education platforms to provide our students with a virtual alternative to coursework. Explore dual tract model for students, one including in-person classroom instruction and hands-on experiences across a calendar year, and one including virtual coursework with a focused, short-term field experience. Recruitment priority will be placed on in-person classroom instruction.



IMPROVING OUR ACADEMIC INSTRUCTION AND DELIVERY

- ♦ Identify opportunities to provide integrated behavioral therapy and peer support for those students electing to pursue the virtual course tract.
- ♦ Advocate for expanded reliable broadband access to rural communities across Kansas. Access to reliable service is key for the successful delivery of virtual courses and tele-health.
- ♦ Partner with K-State Research and Extension and other professional educators to diversify learning experience to include horticulture and specialty crop and livestock production.
- ♦ Prioritize the fundraising and planning for the construction of a dedicated classroom space with bathrooms and an office for on-site behavioral therapy on the SAVE farm near Riley, KS. Continue to explore needs and establish funding for additional infrastructure including housing.
- ♦ Continue to partner with the University of Montana to deliver programs for apprentice, journeyman, and master-level beekeeping training. Develop and deliver commercial-level beekeeping and honey production training.

ADDRESSING THIS PRIORITY



IMPROVING OUR ACADEMIC INSTRUCTION AND DELIVERY

ADDRESSING THIS PRIORITY

- ♦ Continue developing and delivering farm tours. These tours serve not only as educational activities but are opportunities to share the SAVE story and expand our partnerships.
- ♦ Develop a professional trainee-to-employee program that partners interested veterans with an industry partner for hands on training and career opportunities.

WHAT DOES SUCCESS LOOK LIKE?

- ♦ SAVE delivers a high-quality educational experience to our students, providing flexible, regionally-specific training online, in the classroom, and hands-on in the field.
- ♦ At least 80% of SAVE graduates are still working in an agribusiness-related career five years after program completion



IMPROVING OUR ACADEMIC INSTRUCTION AND DELIVERY

“One of the greatest things about SAVE Farm is that it's student led, that there is so much focus on the students and helping them get to where they want to go. The instructors and the mentors that are available are incredible.”

“So people from even outside of the program ...and also those we interacted with during the class, there were more than willing to help us with anything and everything. That's huge, because when a person who's successfully doing something says to another person, I'll help you or it's possible. Like, that's just hugely helpful in all ways.”

“It would be nice to be able to fall into a niche that you were able to, no matter where you were in your life, no matter where you were in the United States, you were able to walk onto a campus and say, I'd like to do SAVE and they say, yes, go right ahead, right here, come on in.”

Anonymous quotes from members, participants, and stakeholders of SAVE Organization



IMPLEMENTING SYSTEMS TO IMPROVE INTERNAL COMMUNICATION AND EXTERNAL MARKETING AND OUTREACH

ADDRESSING THIS PRIORITY

- ♦ Form and activate a Communications Committee comprised of board members and external partners (if necessary). Committee will report at each board meeting and provide a monthly written summary of activities and recommendations to all board members.
- ♦ Develop a formal communications and outreach strategy to accompany this overarching strategic plan. The communication plan should be developed by the CEO, in partnership with the Communications Committee, and should place immediate emphasis on student recruitment and funding.
- ♦ Host at least one annual public Open House at the SAVE farm near Riley and the Golden Prairie Honey Farm in Manhattan.
- ♦ Create a SAVE Ambassador Program with consistent presentation materials (ie – PowerPoints, brochures, talking points). Ambassadors could include board members, SAVE program graduates, and others. All Ambassadors will receive training and will be equipped to share a consistent representation of SAVE. Ambassadors commit to reaching out to a minimum of five current or potential partners, donors, or sources of students per year.



IMPLEMENTING SYSTEMS TO IMPROVE INTERNAL COMMUNICATION AND EXTERNAL MARKETING AND OUTREACH

- ♦ Update and maintain SAVE website and marketing materials to reflect our mission, vision, and current priorities.
- ♦ Create and distribute a high quality, informative monthly newsletter highlighting activities, events, successes, and needs of both SAVE and Golden Prairie Honey Farm.
- ♦ Enhance SAVE social media presence with a focus on promoting SAVE-specific programs and activities, complemented by re-posts from other organizations or news sites.
- ♦ Reengage 502 Media, presenting this strategic plan to inform the development of our strategic marketing and outreach plan.

ADDRESSING THIS PRIORITY

- ♦ SAVE is recognized locally, regionally, and nationally as a premier, veteran-focused, agricultural training organization.
- ♦ SAVE board members, employees, volunteers, and partners feel well-informed and equipped to share our mission, vision, and priorities.

WHAT DOES SUCCESS LOOK LIKE?



BUILDING A PARTNER AND VOLUNTEER PROGRAM THAT FOCUSES ON RECRUITING AND RETAINING NEW AND CURRENT PARTNERS AND VOLUNTEERS

ADDRESSING THIS PRIORITY

- ♦ Develop a comprehensive list of our partners and volunteers including contact information and a description of assets and services.
- ♦ Clearly identify partners and significant donors on our website with a description of benefits provided.
- ♦ Formally recognize through our website and outreach materials the unique partnership with and significant contributions of Konza Community Health Center in the delivery of behavioral health services.
- ♦ Provide routine communication through newsletters, emails, and personal phone calls to ensure all partners and volunteers are informed of our current activities, programs, and needs.
- ♦ Host an annual event to honor and show appreciation to our donors, volunteers and partners.
- ♦ Celebrate our course and program graduates each year with a ceremony.
- ♦ Share our story with the Knowledge Based Economic Development (KBED) partnership to explore opportunities for economic development and job creation.
- ♦ Host a presentation of the SAVE programs with K-State Extension Professionals and faculty with an expressed interest in supporting veterans through outreach and education.



BUILDING A PARTNER AND VOLUNTEER PROGRAM THAT FOCUSES ON RECRUITING AND RETAINING NEW AND CURRENT PARTNERS AND VOLUNTEERS

- ♦ Continue to engage with the Governor's Behavioral Health Services Planning Council.
- ♦ By 2025, evaluate progress towards implementation of this strategic plan and the development of a clear model that can be replicated in alternate regions of the United States. At that time, collaborate with the Association of Public and Land Grant Universities (APLU) and garner cross agency support from the Department of Agriculture, the Department of Defense, and the Department of Veterans Affairs, to launch a Capacity Development Grant program. The purpose of these grants is to build wide spectrum veteran-focused farm training programs across the nation through an integrated network of land grant institutions using the SAVE model.

♦
All of our partners, donors, and volunteers feel valued, appreciated, and well informed and are poised to advance our mission, vision, and priorities.

ADDRESSING THIS PRIORITY

WHAT DOES SUCCESS LOOK LIKE?



DEVELOPING CLEAR WAYS TO MEASURE, EVALUATE, AND COMMUNICATE THE IMPACT OF OUR WORK

ADDRESSING THIS PRIORITY

- ♦ Collect and maintain consistent metrics related to program participation and completion and farm tour attendance.
- ♦ Conduct an annual survey of student graduates to assess transition into agricultural and agribusiness careers.
- ♦ Continue to contract with a third party evaluator such as K-State Office of Educational Innovation and Evaluation for all major grants.
- ♦ Identify opportunities through grants and partnerships with K-State to collect data on the impacts and outcomes of horticultural therapy and integrated behavioral health treatments.
- ♦ Collect data related to soil health, water use, and other variables to demonstrate the short and long-term effects of regenerative agricultural practices.
- ♦ Clearly measure and document the process and outcomes of the partnership with Grandma Hoerners to pilot the processing of honey. This information will be helpful in evaluating the pros and cons for fully launching an at-scale honey processing program.
- ♦ Hold an annual board retreat to review and assess progress towards meeting the goals and priorities of this strategic plan.



DEVELOPING CLEAR WAYS TO MEASURE, EVALUATE, AND COMMUNICATE THE IMPACT OF OUR WORK

- ♦ Our results and impacts are readily accessible and are communicated externally.

WHAT
DOES
SUCCESS
LOOK LIKE?



WHAT IS NEXT

SAVE is poised for a positive future because all partners share a common vision in relation to the organization's core mission, intent, and direction. It is an exciting, challenging, and meaningful direction, which helps give all of us a feeling of purpose, pride, and unity. In the next five years, we will expand our reach, strengthen our network of stakeholders and partners to leverage their assets in meeting our mission, and firmly establish SAVE as the model for veteran-focused agricultural training programs. There will never be a shortage of veterans transitioning into civilian life – nor a shortage in the demand for food production. Where those two spaces meet - that is where SAVE lives. If you believe in our vision and mission and are inspired by the opportunity to make a meaningful impact in the lives of our nation's veterans and agricultural community – join us!

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STRATEGIC PLAN

Developed based on input from the
members and stakeholders of the SAVE
Organization

REPORT BY SUSAN METZGER