

Bangor University

DOCTOR OF PHILOSOPHY

The Value of Connection to Nature: Strategic Thinking in Environmental Organizations

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Award date:
2020

Awarding institution:
Bangor University

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BANGOR BUSINESS SCHOOL

**The Value of Connection to Nature:
Strategic Thinking in Environmental Organizations**



Betws-y-Coed – Conwy Falls

A thesis submitted to Bangor University in fulfilment of the requirements for
the Degree of Doctor of Philosophy

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December 2020

Declaration

I hereby declare that this thesis is the results of my own investigations, except where otherwise stated. All other sources are acknowledged by bibliographic references. This work has not previously been accepted in substance for any degree and is not being concurrently submitted in candidature for any degree unless, as agreed by the University, for approved dual awards.

Yr wyf drwy hyn yn datgan mai canlyniad fy ymchwil fy hun yw'r thesis hwn, ac eithrio lle nodir yn wahanol. Caiff ffynonellau eraill eu cydnabod gan droednodiadau yn rhoi cyfeiriadau eglur. Nid yw sylwedd y gwaith hwn wedi cael ei dderbyn o'r blaen ar gyfer unrhyw radd, ac nid yw'n cael ei gyflwyno ar yr un pryd mewn ymgeisiaeth am unrhyw radd oni bai ei fod, fel y cytunwyd gan y Brifysgol, am gymwysterau deuol cymeradwy.

Abstract

Strategic thinking has evolved from a concept predominantly based on analytical thinking, closely integrated with strategic planning, to a broader mindset, yet it remains strongly 'head based'. This study explores a context where a broader, more holistic perspective exists, focusing on the connection of small and medium-sized environmental organizations with the natural world; why and how this relationship influences strategic thinking and how it enables organizations to leverage limited resources.

The research methodology reflects the rationale that a holistic perspective of strategic thinking is best understood by adopting an interpretivist research philosophy, using an inductive, ethnographic approach, focused on interpreting deep, rich layers of meaning within participant data to inform new theory and existing practice. The triangulated multi-method approach, within an embedded case study setting, comprises thirty-eight individual interviews and four workshops (interviews, participant observation).

The research findings indicate that the participants have a strong connection with nature through a diverse, broad range of sensibilities or multiple intelligences (mind, heart, body and spirit), extending beyond a cognitive understanding. Participants share a common experiential process of connection that binds them together as purpose driven organizations.

Both strategic thinking and planning are critical, incorporate different ways of thinking, and enable participant organizations to meet, resolve or simply *hold* opposing stakeholder worldviews and perspectives, underpinning the ability of organizations to leverage their limited resources, maintain sustainability and achieve core purpose. The strategic thinking process is emergent, complex, interconnected, informal and embedded within pivotal places alongside governance, strategic planning and other key processes.

Key words

strategic thinking, connection, environmental organizations, sustainability, multiple intelligences, holistic thinking, the natural world.

Acknowledgements

I am grateful to my Supervisor who has always believed in the potential of this research study. I am fortunate to have been accepted into a vibrant academic community, who offered me encouragement, friendship and support. And I feel privileged to have worked with the participant research group who always prioritised the research despite their ridiculously busy schedules. Their generosity is beyond value.

Most importantly, I am eternally grateful to my wife, who has seen me at my best and my worst, my family and close friends who have stood by me and made this possible and to my 'wee' Jack Russell terrier, 'Buddha', who was always available for walks when space is what I needed most. Together, they have allowed me to change my life.

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1. Introduction

1.1 Introduction

This thesis focuses on small and medium-sized organizations supporting the natural environment and looks at whether their strongly-felt connection with nature enables them to open up to a broader perspective on strategic thinking, one that incorporates a diverse range of sensibilities (or intelligences) including head (thinking), heart (feeling and relationships), body (gut feeling or intuition) and spirit (our connection to the whole). The research questions are theoretical (how and why this may be the case), practical (how this enables the organizations to leverage their limited resources) and contextual (how a relational approach might challenge our existing understanding of strategic thinking). This addresses a knowledge gap in the practice of strategic thinking in this specific field.

The research methodology is based on the principle that we can best understand a holistic perspective of strategic thinking by adopting a holistic research framework using an inductive, ethnographic approach. This is framed within an interpretivist philosophy where the aim is to extract meaning from the research data in order to contribute to developing new theory and providing greater understanding to practitioners from the deep, rich data within the research study.

This chapter is divided into nine sections; an introduction, the research background and scope, the theoretical context (including the knowledge gap), the aim, objectives, rationale and research questions, the research methodology and context, the research contribution, key terms, the structure of the thesis and the conclusions. It also addresses the important question of why we should care about the research.

1.2 Research background and scope

When the French philosopher, René Descartes (1596 – 1650), wrote his seminal works, *Discourse on the Method* (1637) and *Meditations on First Philosophy* (1641), his belief in the separation of mind and matter, captured in his philosophical proposition, 'I think, therefore I am', had a profound and deep impact on Western philosophy. This concept of separation has not only lasted to this day, but it is also deeply embedded within our contemporary outlook on the world. Indeed, the term Cartesian philosophy or Cartesianism (which views the mind as wholly separate from the corporeal body) is named directly after the Latin form of his name (Renatus Cartesius).

The concept of strategic thinking has developed within this overriding and largely unconscious paradigm of separation. The terminology, strategic thinking, is, in itself, a strong indication of the abiding dominance of the 'head based' nature of the process and how it persists despite the increasingly complex nature of the world around us, which calls for a more holistic or systemic approach (Senge, 1990; Kurtz and Snowden, 2003), one that acknowledges complexity and an emergent quality in strategy (Mintzberg, 1994; Neugebauer, Figge and Hahn, 2015). How can we move beyond this limitation? One way is to find a place where a different paradigm might work and explore why this might be the case.

This research study focuses on small and medium-sized environmental organizations and looks at whether their strongly felt connection with nature enables them to move beyond a Cartesian mindset (based primarily on intellect) to a broader, more holistic perspective on strategic thinking, which incorporates a range of sensibilities or multiple intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011), encompassing a spectrum of human capabilities of perceiving and understanding the world; mind (cognitive, analytical; Ansoff, 1965; Porter, 1979, 1985, 1991, 1996), heart (feelings, emotional, relational; Goleman, 1996, 2004), body (senses, gut feeling, intuition; Mintzberg, 1994; Minocha and Stonehouse, 2007; Shapiro, 2011, 2019), spirit (inner knowing, connection to the whole; Zohar and Marshall, 2001) or a mixture of cognitive and more intuitive thinking processes (Calabrese and Costa, 2015) linking “our intuitive sense of events ... with our intellectual understanding” (Sanders, 1998, p.10).

Whilst scholars have acknowledged the importance of formulating strategy in relation to a rapidly moving and challenging environment with an emphasis on sustainability (Aragón-Correa, 1998; Bradbury and Clair, 1999; Stead and Stead, 2000) and some have also stressed the need for a more interactive remit to tackle societal issues (Singer, 1994; Vaara and Durand, 2012; Husted, 2013), little thought has been given to what we can learn about the nature of strategic thinking from the natural world itself. By looking at the value inherent in a connection with nature we can explore whether this relationship influences and potentially enhances the ability of small and medium-sized environmental organizations to think strategically.

1.3 Theoretical context

The literature review seeks to establish a broad understanding of the meaning and development of strategic thinking and what it means to be connected to the natural world. Over twenty years ago Heracleous stated that “there is no agreement in the literature on what strategic thinking is” (Heracleous, 1998, p.2) and this remains the consensus of opinion (Bonn, 2001; Goldman and Casey, 2010). As a result, the research study takes a broad view of strategic thinking within the development of strategy as a whole by developing a framework that matches six different perspectives of strategy with the key internal and external dimensions of the strategic process (figure 1, chapter 2, section 2.6).

This framework broadens the literature review to capture a wide body of work and acknowledges that the field is complex and interconnected. It provides an overview of the current and historical landscape of the literature, an overall sense of direction and the relationship of the strategic thinking literature to the wider organizational literature, including the traditional analytical approach (Ansoff, 1965; Porter, 1979, 1985), a broad base of strategic and organizational theory (Mintzberg, 1987a, 1987b, 1994) and frameworks drawing from a diverse theoretical background including complexity theory (Kurtz and Snowden, 2003), systems theory (Senge, 1990; Mele, Pels and Polese, 2010), the natural sciences (Sanders, 1998; Eisenhardt and Sull, 2001) and the praxis literature (Goldman, Scott and Follman, 2015).

There is a clear pattern within this framework of the emergence and evolution of strategic thinking over the past forty years, from a concept predominantly based on analytical thinking closely integrated with the

strategic planning process (Porter, 1991) to a broader, more holistic or systemic mindset (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010; Moon, 2012), yet one that retains an analytical and cognitive dimension (Bonn, 2005; Calabrese and Costa, 2015).

This understanding is complemented by a review of nature-based literature; academic (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg, Wood, Barton and Pretty, 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz, Shriver, Tabanico and Khazian 2004; Dutcher, Finley, Luloff and Johnson, 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009) and literary (Masson, 2005; McCarthy, 2009; Macdonald, 2014; Macfarlane, 2019a, 2019b). This extends the theoretical context by considering how those working in, and writing about, the natural world perceive themselves and the work that they do.

There is a paucity of research on the nature of strategic thinking within small and medium-sized environmental organizations, which extends to the environmental sector as a whole (Kendall and Knapp, 1996; Clifford, Geyne Rajme, Smith, Edwards, Buchs and Saunders, 2013). It remains “a marginalized object of analysis” (Clifford et al., 2013, p.243) despite the fact that nature-based challenges (climate change, loss of biodiversity and abundance, destruction of habitats and ecologies, food, land and marine issues) threaten the importance of nature as humanity’s life support system. This represents an important knowledge gap and it is addressed in theoretical and practical terms by research questions 1 and 2 (section 1.4.3).

Although the literature on multiple intelligences and strategic thinking overlap in some areas (matters of scope) there is a paucity in research in looking at a holistic evaluation of the value and practical impact of more embodied forms of thinking on the strategic thinking process in the form of an embedded case study in a practical context. Similarly, although there is academic research on the nature of our connection to natural world, this has not been linked explicitly to strategic thinking. This is explored in research question 3 (section 1.4.3).

1.4 Aim, objectives, rationale and research questions

1.4.1 Aim and rationale

The aim of the research is to explore the nature of strategic thinking from a wider perspective, moving beyond a Cartesian mindset (based primarily on intellect) to a more holistic approach. The underlying rationale is that there is a value in a connection to the natural world, which contributes to an ability to see a bigger, more holistic picture within the context of the strategic thinking process. Small and medium-sized environmental organizations provide an ideal context to enter into this deeply connected world.

1.4.2 Objectives

The three key objectives of the research are:

1. To examine how and why a sense of connection with the natural world contributes to the ability of small and medium-sized environmental organizations to think strategically and to assess the value of this connectivity to these organizations.
2. To identify how this sense of connection contributes to the ability of small and medium-sized environmental organizations to achieve a range of broad objectives (both strategic and operational) with limited resources.
3. To examine how and why a more relational approach to strategic thinking, based on a sense of connection, challenges our existing understanding of strategic thinking.

The first research objective is theoretical, the second is more practical and the third looks at the implications of a more relational approach to strategic thinking based on a connection to the natural world.

1.4.3 Research questions

The three objectives above are expressed as three succinct research questions:

1. How and why does a sense of connection with the natural world contribute to the ability of small and medium-sized environmental organizations to think strategically?
2. How does this sense of connection contribute to the organizations' ability to achieve key strategic and operational objectives with limited resources?
3. How does a more relational approach to strategic thinking, based on a sense of connection, challenge our existing understanding of strategic thinking?

1.5 Research methodology

The research methodology is based on the principle that we can best understand a holistic perspective of strategic thinking by adopting a holistic research framework using an inductive, ethnographic approach. The research perspective is interpretivist (ontological constructivism and epistemological interpretivism) giving it a "focus on meaning in context" (Myers, 2013, p.39), which is aligned to the complex and connected nature of strategic thinking (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010) The aim is to extract meaning from the deep, rich research data to contribute to developing new theory and providing greater understanding to practitioners. A pragmatic approach is taken that recognises the value of existing frameworks to inform rather than constrain new theory development. An ethnographer "enters the field with an open mind, not an empty head" (Fetterman, 1998, p.1).

1.5.1 Research design

The research design takes the form of an embedded case study using a triangulated multi-method approach comprising individual interviews, group interviews and participant observation. Thematic analysis is used to analyse the data, which offers a systematic way of making sense of collective or shared meanings and experiences (Braun and Clarke, 2012). The practical process of data collection and analysis includes transcripts of all data, the use of 'Quirkos', a computer-aided qualitative data analysis software package ('CAQDAS') and analytical memos at increasing levels of abstraction.

The triangulated multi-method research design comprised 38 individual interviews (including five supplementary feedback interviews), four group interviews (conducted within workshop events where six to eight participants came together as a community of shared interests and experience) and participant observation. This approach provided a practical setting and context for the embedded case study research (Yin, 2014), exploring *how* and *why* a connection with nature impacts on the ability of small and medium-sized organizations to think strategically, yielding deep, rich and multi-layered data grounded in the participants' practical day-to-day work experience.

1.5.2 Research context

Environmental organizations are those in "environmental conservation, pollution control and prevention, environmental education and health, and animal protection" (International Classification of Nonprofit Organizations, Clifford et al., 2013, p.244). The 38 research participants represented 29 small and medium-sized environmental organizations located across the United Kingdom, and had a broad church of organizational structures, most of which (27) were charities, social and community enterprises and hybrid structures. Participant organizations shared a strong sense of underlying social purpose related to protecting, conserving, supporting and regenerating nature (flora, fauna and landscape, animal welfare, enhancing the lives of people through nature, campaigning and advocacy). (Appendix H).

1.6 Contribution: Why should we care?

Strategic thinking is a complex process (Mintzberg 1994) that is seen as critical to success and complementary to strategic planning (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002). Environmental challenges are complex, systemic and "wicked" (characterised as "symptomatic of deeper problems", "persistent and insoluble", not easily reversed and offer no clear alternative solutions; Frame, 2008, p.1113; Neugebauer, Figge and Hahn, 2015). A strong connection with the natural world plays an important role in aligning the strategic thinking processes in small and medium-sized environmental organizations to the underlying nature of the complex environmental issues and challenges that we face.

Understanding the process by which this happens, which includes an important holistic dimension, offers not only theoretical insight (related to the knowledge gap above) within an area of great importance (research question 1) but also adds insight into how environmental issues are tackled and resolved *in practice* by organizations, particularly when they operate with very limited resources (research question

2). These insights, at theoretical or practitioner level, are useful to those in the environmental field to help improve their processes, performance and ability to address environmental issues. This may make a big difference and it's a difference worth making. Aldo Leopold (1887-1948), one of the father figures of ecology and conservation, summarized the challenge succinctly over eighty years ago:

"We end ... at ... the standard paradox of the twentieth century: our tools are better than we are, and grow better faster than we do. They suffice to crack the atom, to command the tides. But they do not suffice for the oldest task in human history: to live on a piece of land without spoiling it."

Aldo Leopold, 1938 (Flader and Callicott, 1991, p.254)

1.7 Key terms

The inductive, qualitative research methodology enables key terms to be defined as part of the data analysis process. However, provisional working definitions were adopted after the literature review (chapter 2) for strategic thinking and a connection to nature and then compared and contrasted with participant data during data analysis (chapter 4, section 4.3.11).

A simple working definition for strategic thinking was developed from the key elements within the strategic thinking literature (chapter 2, section 2.14). The initial working definition is:

'The ability to see the whole combined with the capability to act on this understanding in order to build a long-term sustainable position.'

The definition of connection to the natural world was drawn from the key elements of the academic literature relating to the environmental sector (chapter 2, section 2.12.3). A connection to nature is:

'A shared sense of identity, an experience of oneness, in part or whole, which enables us to love and care for the natural world and act on its behalf, recognising both its extrinsic and intrinsic value.'

1.8 Structure

This thesis comprises five chapters; the introduction, the literature review, the research methodology, data analysis and discussion and conclusions. This introduction contains an overview of the thesis including the scope of the research, the theoretical context and knowledge gap, the research aim, objectives and questions, methodology, contribution, definition of key terms and the overall structure of the thesis.

The literature review chapter looks at the development of strategy and strategic thinking literature over the past forty years, presented within a framework that matches six different perspectives of strategy with the key internal and external dimensions of the strategic process (figure 1, chapter 2, section 2.6). This is complemented by a nature-based literature review, which contains both academic literature and more general literary and practitioner literature.

The research methodology chapter summarizes the aim, objectives and scope of the research, the conceptual research methodology and framework and the research methods. It incorporates a review of the ethnographic process, embedded case study design and the importance of praxis in the research area. It contains contextual information, including the nature of the environmental sector as well as broad participant data. Finally, it looks at the data collection and analysis process (including thematic analysis, the coding system and analytical memos).

The data analysis and discussion chapter discusses the participants' analytical story, compares and contrasts this with the extant body of the literature, reflects on the alignment between the key strands in the literature and the participants' emerging story and presents the research findings. It also compares the participants' analytical story to the initial aim and rationale of the research and notes where key insights and findings are outside the original preconceptions of the researcher. This chapter presents the analysis of participant data top down but acknowledges that it is often better understood bottom up. Key themes are discussed, clustered by research question and then summarized as an integrated story as a whole. At the same time, each individual theme has an important and insightful narrative *in its own right* and makes an important contribution to the research as a whole.

The conclusions chapter summarises the key research findings (the participants' analytical story, the theoretical context and research contribution) by research question and as an integrated whole. The research contribution is assessed in terms of theoretical development and practitioner utility. The participants' story is supported by quotations and illustrations in key areas, where this helps to depict complex processes. Limitations of the research study are noted and conclusions are drawn covering the story to date, future implications and the significance of the findings in relation to the research sector. Finally, there is a short personal reflection on the research process.

1.9 Conclusions

The process of understanding more fully how small and medium-sized environmental organizations engage with their strategic thinking processes, and the broader, deeper and more embodied dimension within them, makes an important contribution within the sector, both in terms of theoretical development and at a practitioner level. Hopefully, it will inspire further research, which may shed light in other domains characterized by similar challenges and uncertainties. The environmental sector, currently under researched and not fully understood, is dealing with challenges that are complex, turbulent and volatile, which have significant implications for society as a whole, including political, social and economic factors, as well as environmental matters such as climate change, significant loss of biodiversity and the erosion of the web of life; in short, the increasing fragility of our life support system.

These issues are complex and interconnected; habitats and ecologies, ocean and air currents, temperature and biodiversity are integrated, mutually dependent and holistic. What first appears as a detail can carry great significance throughout the broader system. The way in which small and medium-sized environmental organizations have developed and engage with their strategic processes, including the role of the strategic thinking process, is vitally important within this context and will affect us all.

Complex, holistic environmental challenges require a commensurate response:

“For a moment, it's as if Thunberg were the eye of a hurricane, a pool of resolve at the center of swirling chaos. In here, she speaks quietly. Out there, the entire natural world seems to amplify her small voice, screaming along with her. ‘We can’t just continue living as if there was no tomorrow, because there is a tomorrow’, she says, tugging on the sleeve of her blue sweatshirt. ‘That is all we are saying.’ It’s a simple truth, delivered by a teenage girl in a fateful moment” (Alter, Haynes and Worland, *Time Magazine*, 2019, on Greta Thunberg, Person of the Year, 2019).

2. Literature Review

2.1 Introduction

The focus of the literature review is to establish a broad understanding of the meaning and development of strategic thinking using a number of different perspectives and dimensions drawn from the field of strategy as a whole and to address what it means to be connected to the natural world. It is complemented by a review of nature-based literature, which draws on the rich seam of literature on the natural world and our relationship with it, and builds an initial contextual understanding of how those working in, and writing about, the natural world perceive themselves and the work that they do.

There is a clear pattern in the emergence and evolution of strategic thinking over the past forty years, from a concept predominantly based on analytical thinking closely integrated with the strategic planning process (Porter, 1991, 1996) to a broader, more holistic or systemic mindset (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001; Graetz, 2002; Goldman and Casey, 2010; Moon, 2012), yet one that retains an analytical and cognitive dimension (Bonn, 2005; Calabrese and Costa, 2015).

2.2 Scope of the literature review

The research study takes a broad view of strategic thinking within the development of strategy as a whole. It provides an overview of the current and historical landscape of the literature, an overall sense of direction and the relationship to the broader organizational literature including the dominant analytical approach (Ansoff, 1965; Porter, 1979, 1985, 1991, 1996; Wernerfelt, 1984; Peteraf, 1993), a broad base of strategic and organizational theory (Tichy, 1982; Mintzberg, 1987a, 1987b, 1994; Hamel and Prahalad, 1994, 1996, 2005; Collins and Porras, 1996, 2005; Schein, 2010) and frameworks drawing from a diverse theoretical background including complexity theory (Kurtz and Snowden, 2003), systems theory (Senge, 1990; Mele, Pels and Polese, 2010), the natural sciences (Sanders, 1998; Eisenhardt and Sull, 2001) and the praxis literature (Whittington, 1996; Whittington and Caillaet, 2008; Goldman, Scott and Follman, 2015).

The review also seeks to open up an understanding of both the cerebral thinking aspect of strategic thinking and other key aspects of the process that lie beyond an analytical approach (for example, feelings, intuition and so on) including the literature on multiple intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011). For this reason, the scope of the literature review is wide and includes literature that provides potential insights into the strategic thinking process but is not categorized explicitly as such.

It is acknowledged that much of the strategic thinking literature reflects commercial organizations, which are profit driven (and often large organizations in the corporate sector), reflecting the origins of strategy in the private sector, where organizations have a profit orientation within a competitive paradigm and an analytical framework (Ansoff, 1965; Porter, 1979, 1985, 1991, 1996; Wernerfelt, 1984; Peteraf, 1993). Accordingly, the scope has been extended to environmental and small and medium sized organizations (Runhaar, Tigchelaar and Vermeulen, 2008), entrepreneurial firms (Karami, 2007; Haynie, Mosakowski

and Earley, 2010; Groves, Vance and Choi, 2011) and not-for-profit organizations (Drucker 1989; Hatten, 1982; BoardSource, 2005).

2.3 What is strategic thinking?

Over twenty years ago Heracleous (1998, p.2) stated that “there is no agreement in the literature on what strategic thinking is”. This remains the consensus of opinion (Bonn, 2001; Goldman and Casey, 2010) and a broad spectrum of definitions exist. This is, perhaps, not surprising as strategic thinking, by its nature, involves developing new ideas or new ways of thinking about the world and applying them within a specific organizational context. It is a complex process (Mintzberg 1994; Bonn, 2005).

Although there is no agreed definition of strategic thinking, it is generally acknowledged as a way of thinking (Mintzberg, 1987a, 1994,; Liedtka, 1998). It reflects a connected perspective; “an ingrained way of perceiving the world” (Mintzberg, 1987a, p.16). It is holistic (Liedtka, 1998; Bonn, 2001), systems-oriented (Senge, 1990; Bonn, 2005; Liedtka, 1998; Goldman and Casey, 2010; Moon, 2012), involves synthesis (Mintzberg 1994; Heracleous, 1998; Graetz, 2002) and draws from a deeper and wider place, including creativity (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012), divergent thinking (Bonn, 2001; Graetz, 2002; Moon 2012), intuition and innovativeness (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002). Taken as a whole, this way of thinking involves a critical component that is connected, relational and holistic:

“A crucial element of strategic thinking is the ability to take a holistic perspective of the organization and its environment. This requires an understanding of how different problems and issues are connected with each other, how they influence each other and what effect one solution in a particular area would have on other areas” (Bonn, 2001, p.64).

This broader, more holistic, interconnected perspective of strategic thinking has built on Mintzberg's view of it as the key component within the strategic process that seeks to capture this complexity (Mintzberg, 1994). Mintzberg uses the metaphor of a potter at work to view strategy as a craft (Mintzberg 1987b) rather than, necessarily, a pre-determined process. It is non-linear (Ohmae, 1982) and has many forms; sometimes a pattern, a stream of actions, or a ploy rather than plan (Mintzberg 1987a). It is often an emergent rather than a deliberate process (Mintzberg, 1987a, 1987b, 1994), it is “about synthesis [and] involves intuition and creativity” (Mintzberg, 1994, p.108), it is a result of consistency in behavior, “a fluid process of learning through which creative strategies evolve” (Mintzberg, 1987b, p.66) and a matter of commitment (Mintzberg, 1987b; Mintzberg et al., 1998) and mindset.

From this understanding comes a range of perspectives on strategic thinking, which explore different elements, assumptions, skills and capabilities within the strategic process that underlie the capacity to think strategically including systems-based thinking (Senge, 1990), cognitive and creative abilities (Bonn, 2001), the capacity for foresight and insight (Groves, Vance and Choi, 2011), market orientation (Moon, 2012) and the importance of purpose, vision and intent, together with the underlying values and culture within the strategic process (Tichy, 1982; Ghoshal and Bartlett, 1993, 1997; Hamel and Prahalad, 1994, 1996, 2005; Collins and Porras, 1996, 2005; Allio, 2006; Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012; Mitroff, 2016; Hurth, 2017; Rey, Bastons and Sotok, 2019).

2.4 Strategic thinking and strategic planning

Strategic thinking is not strategic planning. There is a broad consensus that it differs from strategic planning in its scope (Mintzberg, 1994) and it is a complex, continuous and intertwined process (Bonn, 2005). Mintzberg (1994, p.107) asserts bluntly that “strategic planning isn’t strategic thinking. One is analysis, the other is synthesis” and that “strategic planning often spoils strategic thinking, causing managers to confuse real vision with the manipulation of numbers”. This famously contrasts with Porter’s view that sees strategic thinking in analytical terms of structural analysis and competitive positioning. “At its root, strategic thinking involves asking two critical questions. First, what is the structure of your industry, and how is it likely to evolve over time” (Porter, 1991, p.90), a view he extends beyond the commercial sector to corporate social responsibility (Porter and Kramer, 2006, 2011).

The most common way of differentiating strategic thinking and strategic planning is the underlying way of thinking, the nature of the cognitive thinking process itself. Heracleous (1998, pp.483-484), applying the earlier work of Argyris and Schön (1976), contrasts strategic planning (based on single loop learning, in which new strategies are sought within existing governing variables such as cultural norms and rules, objectives and plans) with strategic thinking (using double loop learning, where these variables can be questioned). However, whilst the two processes may differ in scope they are generally considered to be “distinct, but interrelated and complementary thought processes” (Heracleous, 1998, p.482). Strategic thinking and strategic planning may constitute different thinking modes but *both* are key to strategic success and they need to work together:

“Creative, ground-breaking strategies emerging from strategic thinking still have to be operationalized through convergent and analytical thought (strategic planning), and planning is vital but cannot produce unique strategies which can challenge industrial boundaries and redefine industries” (Heracleous, 1998, pp.485-486).

Graetz (2002) built on the work of Heracleous, contrasting strategic thinking (defined as imagining a new future and redesigning strategies accordingly; synthetic, divergent, creative, intuitive and innovative) with strategic planning (realising and supporting the emerging strategies; logical, systematic, conventional, prescriptive and convergent) and linking both to the strategic management system. Given its key role in devising new, innovative strategies, strategic thinking is widely recognised as critical to organizational success, being both a core capability within the strategic process (Bonn, 2001) and an intrinsic part of the strategic management system, underpinning the ability of an organization to understand its environment, develop a clear idea of the future and be innovative, coming up with new ideas in order to outcompete its competitors (Moon, 2012), something that is not possible through strategic planning alone:

“Many firms have excellent strategic planning skills but pay little or no attention to strategic thinking. This imbalance in their behavior often results in firm strategic insanity, whereby firms repeatedly undertake the same business strategies but expect distinct business results each time” (Benito-Ostolaza and Sanchis-Llopis, 2013, p.785).

Whilst there is broad consensus on the nature of strategic thinking, and its distinction from strategic planning, underlying differences continue to exist. Allio (2006, p.4) asserts that strategic thinking is “the

systematic analysis of the current situation of the organization and the formulation of its longer-term direction”, a definition that differs little from that of strategy in general. Bonn (2005, p.337) adopts a definition of strategic thinking that includes *both* the rational and creative properties, “a way of solving strategic problems that combines a rational and convergent approach with creative and divergent thought processes”, thus questioning the clear distinctions made by Heracleous (1998) and Graetz (2002). Almost all the literature, however, supports Mintzberg’s assertion that strategic thinking is “complex and difficult” (Mintzberg, 1994, p.111).

2.5 Theory and practice

Praxis literature focuses on what people in organizations actually *do*, rather than conceptual frameworks; strategy as practice. “The thrust of the practice approach is to take seriously the work and talk of practitioners themselves” (Whittington, 1996, p.732) because whilst strategic thinking is acknowledged as important for both the direction and sustainability of organizations it is “often absent or at least significantly lacking” (Goldman, Scott and Follman 2015, p.155). Praxis is essential to complement theory because:

“Despite the consensus on the need for strategic thinking and the general advice that it should be nurtured by organizations, there is sparse literature on what organizations actually do to help leaders, managers, and others employed by the organization develop their ability to think strategically, how they do it, why they do it, and the degree to which their efforts are effective” (Goldman, Scott and Follman, 2015, p.155).

The importance of understanding the practical process underpinning strategic thinking addresses the level of complexity underlying strategic thinking and acknowledges the importance of the capacity to act (Goldman, Scott and Follman, 2015). It requires paying close attention to the issues of “how work is done, who does it, and the tools that are used” (Whittington and Cailluet, 2008, p.244), requires the researcher to go more deeply inside the process to “examine intimately the kind of work that is actually being done ... [so that] ... real-world, contemporary practice is exposed to view; the nuances of what works and what doesn’t work come sharply into focus” (Whittington and Cailluet, 2008, p.244). It is also useful in building a conceptual understanding of the unique factors that underlie long term organizational performance and sustainability (Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012) through careful and detailed observation in practice.

An emphasis on praxis prompts the researcher to ask quite different questions. It demands that the researcher goes “*inside* the process to examine intimately the kind of work that is actually being done” rather than “simply asking about the performance implications of the presence or absence of some stereotypical strategic planning process” (Whittington and Cailluet, 2008, p.244, researcher italics). In other words, the researcher has to get his or her hands dirty. This is particularly important when strategy is not only complex but emergent (Mintzberg, 1987a; Neugebauer, Figge and Hahn, 2015):

“Effective strategic thinking, acting and learning seem to depend a great deal on intuition, creativity, and pattern recognition, none of which can be programmed although they may be recognized, facilitated, and encouraged” (Monnavarian, Farmani and Yajam, 2011, p.63, paraphrasing Mintzberg et al., 1998).

As a result, conceptual and praxis literature are complementary and both provide useful frameworks to work with the research data. Praxis literature is also helpful in selecting and informing the inductive research methodology (chapter 3), which is designed to enable the researcher to go out and actually listen to those in field. As Drucker comments at the end of his article, 'What makes an effective executive' (2004):

"We've just reviewed eight practices of effective executives. I'm going to throw in one final bonus practice. This one's so important that I'll elevate it to the level of a rule: *Listen first, speak last*" (Drucker, 2004, p.21, italics in original).

2.6 Evolution of strategic thinking: A framework

The framework below (figure 1) maps the evolution of strategic thinking over the past forty years from an analytical concept, closely integrated with the strategic planning process, to a broader, more holistic process, which, nevertheless, retains an analytical and cognitive dimension. It matches six different perspectives of strategy with the key internal and external dimensions of the strategic process (internal capabilities, competencies, strengths and external markets and positioning) and incorporates three key strategic questions, where are we now? (situation assessment or reality check), where do we want to be? (strategic direction, vision and mission) and how do we get there? (execution and monitoring). In reality, the field is complex and interconnected. The framework in figure 1 is thus best seen as indicative.

Figure 1: Evolution of Strategic Thinking: Perspectives and Dimensions

Key Dimensions (The Strategic Journey)	Key Perspectives					
	Competitive Thinking		Connected Thinking		Holistic Thinking	
	Competitive Advantage (Traditional)	Disruption and Renewal (Transformational)	Cultural (Internal)	Systemic (External)	Societal (Sector Specific mutuality)	Unitive (Philosophical/Spiritual)
Internal Where are we now? Internal strategy models Integration of strategic thinking within the strategic management system	Traditional competitive models (zero-sum or win-lose) Analytical frameworks based on independence and control Integration of strategic thinking and strategic planning processes Primarily convergent and deductive reasoning	Core competency and capability models Importance of transformational element of strategy (often top down) Competitive dynamic remains key Integration of convergent and divergent thinking	Emphasis on purpose, vision, mission and values (embedded in culture) Internal models (process, creative, cognitive, organizational, narrative/story, leadership) Entrepreneurial and other models Intuitive element Strategy as an emergent phenomenon	Emphasis changes from independence to a web of relationships with the outside world Systems theory, complexity models and other frameworks that stress connectivity and relationship Value of ecological and scientific frameworks founded on the whole ('web of life')	Social purpose as the key driver for charities, community and social enterprises Broader connectivity with extended stakeholders and communities (members and volunteers etc.) Alternative structures and practices including partnerships, co-operative ventures alliances etc.)	Integrated and holistic based on relationship to/ connection with the whole Elements of other perspectives integrated in context, 'the whole beast' (Mintzberg et al., 1998) Win-win scenarios based on synergy and connection Multiple sensibilities or intelligences (mind, heart, body, spirit) or 'hearts and minds'
Unique Selling Proposition Matching internal and external factors	Focus on sustainable competitive advantage	USP created by disrupting existing status quo and renewal	USP embedded in organizational intent, purpose, vision and mission; expressed through culture	USP embedded in the complex web of relationships within the ecosystem	Success defined in terms of sector; purpose and goals	Purpose organizes around broad societal goals as well as organizational focus
External Where do we want to be? Strategic focus How do we get there?	Implementation and execution ('how') founded on analysis of current position ('why') and future destination ('where') Emphasis on analytical models,	Shift from 'how' (implementation) to future orientation ('where' and then 'how') Imagining new products, services and markets ('blue sky thinking') and	Shift to reflection on internal motivation and intent ('why'), understanding the future in terms of current reality and potential ('now', what remains constant)	Scientific perspective on connectivity - ecology, biology, complexity, quantum physics) Challenges the conventional paradigms on	Shift to fulfilling central purpose redefines success Web of internal and external stakeholders: (members, partners, volunteers,	Reframing: seeing the world from the perspective of the whole ('metanoia') Insight and knowledge flow from an intimate connection with the world

Strategic implementation and execution	tools and techniques to understand external markets, environment and positioning	leading the customer to a new product and market definitions	Superior customer propositions and service based on shared values	independence, separation and control	communities etc.) aligned around a shared sense of purpose	
Positioning in extant literature (indicative)	Allio (2006), Ansoff, 1965; Bonn, 2001, 2005; Heracleous, 1998; Moon, 2012; Peteraf, 1993; Porter, 1979; 1985, 1991, 1996; Porter and Kramer, 2006, 2011; Wernerfelt, 1984.	Christensen, 1997, 2015; Hamel & Prahalad, 1994, 1996, 2005; Johnson, Christensen & Kagermann, 2008; Nalebuff & Brandenburger, 1997.	Bartlett & Ghosal, 1993; Benito-Ostolaza & Sanchis-Llopis, 2013; Bennis & Thomas, 2002; Bonn 2001, 2005; Calabrese & Costa, 2015; Collins, 2001; Collins & Porras, 1996, 2005; Drucker, 2004; Gardner & Laskin 2011; Ghoshal & Bartlett, 1993, 1997; Goldman & Casey, 2010; Graetz, 2002; Granovetter, 2005; Groves, Vance & Choi, 2011; Heracleous, 1998; Hurth, 2017; Liedtka, 1998; Mintzberg, 1980, 1987a, 1987b, 1994; Mitroff, 2016; Rey, Bastons & Sotok, 2019; Schein, 1996, 2010; Thakor & Quinn, 2018; Tichy, 1982; Weeks, 2006; Whittle et al., 2015.	Eisenhardt & Sull, 2001; Frame, 2008; Iansiti & Levien, 2004; Kurtz & Snowden, 2003; Mele, Pels & Polese, 2010; Neugebauer, Figge & Hahn, 2015; Sanders, 1998; Senge 1990; Snowden & Boone 2007; Zahra & Nambisan 2012.	Aragón-Correa 1998; Beng Geok, 2018; BoardSource, 2005; Bragg et al., 2003; Clayton, 2003; Drucker, 1989; Dutcher et al., 2007; Goldman, Scott & Follman, 2015; Hatten, 1982; Hawken, 2010; Hawken, Lovins & Lovins, 2005, 2007; Hurth, 2017; Husted, 2013; Kals, Schumacher & Montada, 1989; Low, 2006; Mayer & Frantz, 2004; Nisbet, Zelenski & Murphy, 2009; Runhaar, Tigchelaar & Vermeulen, 2008; Schultz, 2002; Schultz et al., 2004; Vining, Merrick & Price, 2008; Whittington, 1996; Whittington & Cailluet, 2008.	Bradbury & Clair 1999; Gardner, 1993, 1995, 2003, 2011; Goleman, 1996, 2004; Heuer, 2012; Minocha & Stonehouse, 2007; Ndubisi, Nygaard & Capel 2019; Stead & Stead 2000; Robinson, 2011; Sanders, 1998; Shapiro, 2011, 2019; Singer, 1994; Vaara & Durand 2012; Zohar & Marshall, 2001.
School of Strategy Schools - Mintzberg et al. (1998)	Design Planning Positioning	Configuration	Entrepreneurial Cognitive Learning Power Cultural	Environmental		Whole Beast (Holistic)

Core focus of perspective

Source: Researcher analysis: indicative framework, overlap reflects interconnectivity between approaches.

The use of a range of perspectives maps the evolution of strategic thinking over time as the broader field of strategy has moved from a classical, analytical perspective (Ansoff, 1965; Porter 1979, 1985, 1991, 1996) to a more adaptive and interpretative approach (Mintzberg, 1987a, 1987b, 1994; Goldman and Casey, 2010; Neugebauer, Figge and Hahn, 2015) with a greater emphasis on both external factors, such as the nature of the environment (Kurtz and Snowden, 2003; Snowden and Boone, 2007) and internal factors, such as organizational culture (Tichy, 1982; Schein 2010), vision, values and purpose (Senge, 1990; Collins and Porras, 1996, 2005; Ghoshal and Bartlett, 1993, 1997; Mitroff, 2016; Hurth, 2017; Thakor and Quinn, 2018; Rey, Bastons and Sotok, 2019).

The ten schools of thought underlying strategy formation (Mintzberg et al., 1998) has also been mapped onto figure 1 as an illustration of this shift in emphasis. Nevertheless, the traditional analytical view of strategy, viewed within a competitive paradigm, remains remarkably influential over the time period.

2.6.1 Strategic perspectives and key dimensions

The framework above illustrates a range of perspectives from a competitive paradigm focused on individual actors to more holistic frameworks, which emphasize a deeper level of inter-connectivity and mutuality. Using this spectrum from independence to community (competition to mutuality) six distinct perspectives within three broad categories can be identified over time; competitive thinking (section 2.7),

connected thinking (sections 2.8) and holistic thinking (section 2.9). The framework is subject to significant degrees of overlap due to the interconnectivity between different approaches.

2.7 Competitive thinking: Traditional and transformational

Competitive models of strategy are founded on the central notion of independence. These include traditional models that focus on gaining and holding competitive advantage including frameworks based on strengths, capabilities and competencies (Porter, 1979, 1985, 1991, 1996) and resource-based frameworks (Wernerfelt, 1984; Peteraf, 1993) and those that emphasize the key role of transformative thinking leading to disruption, reinvention and renewal at an industry level (Hamel and Prahalad, 1994, 1996, 2005). Porter (1979, p.137) asserts that the “essence of strategy formulation is coping with competition”. In both cases these models are essentially about winning in a competitive marketplace or gaining access to resources in a zero-sum game.

The traditional, analytical view of strategy is rooted in the idea that organizational success emerges through establishing competitive advantage (defined as the “value a firm is able to create for its buyers that exceeds the firm's cost of creating it”, Porter, 1985, p.3) in a zero-sum game. It focuses on enabling organizations to understand the underlying dynamics of competition in the present moment but “does not assure clarity about how to play the game in the future” (Allio, 2006, p.5). As a result, it has often been adapted to reflect the complexities and inter-relatedness of markets and competition. The concept of co-opetition (a combination of competition and cooperation), for example, builds on establishing an element of collaboration with customers, suppliers and even competitors as part of an effective strategy (Nalebuff and Brandenburger, 1997).

The literature on strategic thinking both embraces this underlying competitive perspective (Heracleous, 1998; Bonn, 2001, 2005; Moon, 2012) and moves beyond it by emphasising the strong sense of connection underlying strategic thinking. Thus, the “ability to think strategically ... is crucial to remaining competitive in an increasingly turbulent and global environment” (Bonn, 2001, p.63) but the nature of this process is complex and requires thought and action to act together (Bonn, 2005, p.338, following Mintzberg et al., 1998), which was termed the capacity to “act thinkingly” by Weick (1983, p.225). This more complex strategic thinking process is expressed both in more holistic terms, including synthesis, systemic and divergent thinking (Mintzberg 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010) and in its more embodied nature, involving creativity, intuition and innovativeness (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002). Yet, often, this is still contained within a competitive paradigm (Heracleous, 1998; Moon, 2012):

“The purpose of strategic thinking is to discover novel, imaginative strategies which can re-write the rules of the competitive game; and to envision potential futures significantly different from the present” (Heracleous, 1998, p.485).

The potentially static nature of the traditional analytical models of strategy led to a reorientation of strategic perspective to consider how markets and competition may evolve and to move the competitive dynamic into the future. “Organizational transformation must be driven by a point of view about the

industry” (Hamel and Prahalad, 1994, pp.127). The underlying competitive nature of the perspective, however, remains explicit, “strategic intent captures the essence of winning”, indeed, “an obsession with winning at all levels of the organization” (Hamel and Prahalad, 2005, p.150). However, it is also based on the belief that strategic thinking should be a more radical process that seeks to redefine both internal capabilities and external markets (Hamel and Prahalad, 1994, 1996, 2005).

Transformational models emphasise disruption and renewal, the periodic need to reinvent core business models in terms of core customer value propositions, profit formulas and the management of key resources and processes (Johnson, Christensen and Kagermann, 2008), which links this perspective back to the work of Porter (1979, 1985, 1991, 1996) with his emphasis on differentiation and establishing a unique position in the marketplace; “a company can outperform rivals only if it can establish a difference” (Porter, 1996, p.62). One, highly visible, strand within this literature seeks to identify why successful companies are successful (Peters, Waterman and Jones, 1982) or why well performing companies fail, addressing issues such as innovation, disruptive technologies and the need to think long term (Christensen, 1997).

The longer-term orientation of this perspective, one of the key components of strategic thinking, links it to the traditional strategic thinking literature (Porter, 1991; Mintzberg, 1994; Bonn, 2001, 2005; Allio, 2006; Goldman and Casey, 2010; Moon, 2012). Frameworks based on transformation and renewal operate within this paradigm, highlighting what makes an organization unique and examining ways in which to ensure the sustainability of this uniqueness or reinvent it entirely. This involves a balancing act between the present and the future, so that executives simultaneously keep their eye on the short term health of their businesses, yet provide adequate resources for the disruptive technologies that might prove their downfall. (Christensen, 1997).

2.8 Connected thinking: Cultural and systemic

Connected frameworks are diverse, focused both internally (cultural) and externally (systemic) and include a large number of different approaches to gaining an understanding of how different elements within an organization influence the broader strategic process, including strategic thinking.

2.8.1 Internal frameworks: Cultural

There are a broad spectrum of internal organizational frameworks including organizational theory and process (Mintzberg, 1987a, 1987b, 1994; Mintzberg et al., 1998), organizational purpose, vision and values (Senge, 1990; Collins and Porras, 1996, 2005; Ghoshal and Bartlett, 1993, 1997; Mitroff, 2016; Hurth, 2017; Thakor and Quinn, 2018; Rey, Bastons and Sotok, 2019), culture (Tichy, 1982; Allio, 2006; Weeks 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012), intentionality (Hamel and Prahalad, 1994, 1996, 2005), cognitive models (Stubbard 1989; Haynie, Shepherd, Mosakowski and Earley, 2010), many of which draw on psychology, the link between social structure and outcomes (Granovetter, 2005), creative approaches (Mintzberg, 1987b, 1994; Heracleous, 1998; Bonn, 2001, 2005; Graetz, 2002), leadership theory (Collins, 2001; Drucker, 2004; Gardner and Laskin, 2011; Gorzynski,

2018), praxis (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015; section 2.5) and the need to for thought and action to work together as an intertwined process (Weick, 1983; Mintzberg et al., 1998; Bonn, 2005):

“Strategic thinking is thus action oriented and concerned with identifying how to resolve ambiguity and make sense of a complex world” (Bonn, 2005, p.338).

Much of the body of the strategic literature is focused on large commercial, often corporate, organizations with a strong profit orientation. Broadening the literature review to organizational theory outside the private sector including the not-for-profit sector (Hatten, 1982; Drucker, 1989; BoardSource, 2005), entrepreneurial and small and medium-sized organizations (Runhaar, Tigchelaar and Vermeulen, 2008; Haynie et al., 2010; Groves, Vance and Choi, 2011) and family firms (O'Regan, Hughes, Collins and Tucker, 2010) helps to redress this balance (sections 2.8.4 and 2.9.1 below).

2.8.2 Purpose, vision, mission, values and culture

One strand in the organizational literature focuses on factors that bind organizations together, for example, the role of organizational culture in defining an organization's sense of uniqueness and its internal capabilities (Tichy, 1982; Allio, 2006; Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012) and purpose, mission, vision and values (Senge, 1990; Ghoshal and Bartlett, 1993, 1997; Collins and Porras, 1996, 2005; Runhaar, Tigchelaar and Vermeulen, 2008; Alavi and Karami, 2009; Mitroff, 2016; Hurth, 2017; Beng Geok, 2018; Thakor and Quinn, 2018; British Academy of Management ('BAM'), 2018, 2019; Rey, Bastons and Sotok 2019). At a deeper level, the way in which an enterprise defines itself, the dominant way in which it operates and how this is expressed to the outside world (Morgan, 2006; Gorzynski, 2018) has important consequences for the strategic process and the way in which the organization conceptualizes the strategic thinking process (Goldman and Casey, 2010).

There is a growing recognition in the literature of the importance of organizational purpose and values in creating a long-term sustainable position for a wide spectrum of organizations; commercial (Ghoshal and Bartlett, 1993, 1997; Collins and Porras, 1996, 2005; Hollensbe, Wookey, Hickey, George and Nichols, 2014; Kenny, 2014; Mitroff, 2016; Hurth, 2017; Thakor and Quinn, 2018; BAM, 2018, 2019; Rey, Bastons and Sotok, 2019), small and medium-sized enterprises (Runhaar, Tigchelaar and Vermeulen, 2008; Alavi and Karami, 2009) and not-for-profit concerns (Drucker, 1989; BoardSource, 2005; Beng Geok, 2018). BAM defines purposeful business as “articulating and adopting a purpose statement at the *core* of a company's articles of incorporation” (BAM, 2019, title page, researcher italics) and purpose as “the reasons a corporation is created and exists, what it seeks to do, and what it aspires to become” (BAM, 2018, p.10). Moreover, “all corporate purposes should be intrinsic in the sense that they are core to the business ...they are distinct from the consequential implications for the corporation's profitability and shareholder returns” (BAM, 2018, p11).

The importance of purpose and values in an organizational context is not new. Nearly 30 years ago Ghoshal and Bartlett argued that there was a need to create a new managerial theory of the firm, one that was able to “illuminate the corporate world as seen by managers [*and*] the issues they perceive to be

important” (Bartlett and Ghoshal, 1993, p.23). They proposed that organizations are defined by purpose, process and people, rather than strategy, structure and systems (Ghoshal and Bartlett, 1997).

This focus on purpose acknowledges “the interdependence of business and society—one cannot flourish without the other” and it engenders trust (Hollensbe et al., 2014). It is linked to managing by values (Mitroff, 2016), is key to meeting the challenges of a “volatile, uncertain, complex and ambiguous environment” and is the “heart of governance” (Hurth, 2017 p.2 and p.4). Purpose is:

“the ‘why’ of our actions and efforts ... our contribution to this world and to the society in which we live ... is generally associated with concepts such as mission, vision, or ultimate aspirations [*and is*] the basic idea – the essence – that underlies and sustains the meaning of these concepts. More specifically ... the foundation of the mission” (Rey, Velasco and Almandoz, 2019).

“Not about economic exchanges. It reflects something more aspirational. It explains how the people involved with an organization are making a difference, gives them a *sense of meaning*, and draws their support” (Thakor and Quinn, 2018, p.78, researcher italics).

These all-encompassing definitions of purpose go beyond much of the traditional organizational and strategic literature, where business is seen in commercial terms, based on a profit orientation within a competitive paradigm (Porter, 1979, 1985, 1991, 1996). However, the key role of purpose, a strong sense of mission, vision and core values, is a strong thread in the current body of the literature. Even Porter has acknowledged the importance of social values within commercial organizations, albeit within a traditional competitive and economic framework (Porter and Kramer, 2011). When strong values and a sense of aligned purpose become strongly institutionalised, formal structure (through rituals and ceremonies) can incorporate organizational myths, which make them “more legitimate, successful, and likely to survive” (Meyer and Rowan, 1977, p.361):

“Companies that enjoy enduring success have core values and a core purpose that remain fixed while their business strategies and practices endlessly adapt to a changing world. The dynamic of preserving the core while stimulating progress is the reason that ... [*they were*] able to renew themselves and achieve superior long-term performance” (Collins and Porras, 1996, p.65, researcher italics).

“A significant and positive correlation was found between firm performance and the presence of a written mission statement” (Alavi and Karami, 2009, p.561).

A strong sense of purpose enables organizations to balance the interests of different stakeholders, all those groups or individuals who affect, or are affected by, the organization achieving its objectives (BAM, 2019, p.17). It is a key factor in strategic decision-making (Regnér, 2003; Jarzabkowski, 2004). Praxis literature, which focuses on “micro-level processes and activities [*that*] have been less commonly evaluated” (Regnér, 2003, p.57), builds on Mintzberg’s work on the emergent properties of strategy and suggests that in certain contexts there is a role for multiple (and potentially contradictory) strategic processes within a single organization, for example, inductive and deductive strategic processes can co-exist together (Regnér, 2003) as can recursive and adaptive processes (Jarzabkowski, 2004). This may contribute to balancing the different interests and perspectives of different stakeholders.

Organizational culture is also a key factor in organizational success and decision-making (Schein, 2010), a “prime contributor to the level of strategic thinking practiced by individuals in organizations” (Goldman and Casey, 2010). The phrase, “culture eats strategy for lunch” (Weeks, 2006, p.1, quoting Dick Clark, Merck’s former CEO), neatly summarises the potential outcome when there is a clash between desired actions and an organization’s core values, beliefs and assumptions (Goldman and Casey, 2010, drawing on Weeks, 2006). This is a complex area. Culture is often informal as well as formal, covert as well as overt and many aspects may be unacknowledged, residing in the organization’s shadow side (Egan, 2012). Schein (1996) captures this layered complexity when he defines culture as:

“A set of basic tacit assumptions about how the world is and ought to be that a group of people share and that determines their perceptions, thoughts, feelings, and, to some degree, their overt behavior ... [*where*] the level of deep tacit assumptions are the essence of the culture” (Schein, 1996, p.11, researcher italics).

Organizational culture is not only complex, it is deeply interconnected with other elements within the organization. Tichy (1982) conveys this using the powerful metaphor of a strategic rope, where the key strategic strands within an organization (technical, political and cultural systems) are intertwined, contain many sub strands and are difficult to see separately. In addition, the strands are closer to, or further away from, the surface over time. To be effective an organization needs to align these strands, whether consciously or unconsciously (Tichy, 1982). Understanding organizational culture is a key dynamic in strategic change:

“As social tools, organizations are held together, in part, by a normative glue – that is, by the sharing of certain important beliefs by its members. Hence the organization must determine what norms and values should be held by its members” (Tichy, 1982, p.63).

This links to the work of Senge (1990) on the importance of a shift in mindset (metanoia) as key to building a learning organization (including an awareness of organizational values and shared vision) and to Mintzberg’s discussion on strategy as perspective, particularly the durability, embedded nature and long-term influence of organizational perspective on organizational decision-making:

“No matter how they appear ... there is reason to believe that while plans and positions may be dispensable, perspectives are immutable. In other words, once they are established, perspectives become difficult to change. Indeed, a perspective may become so deeply ingrained in the behavior of an organization that the associated beliefs can become subconscious in the minds of its members. When that happens, perspective can come to look more like pattern than like plan - in other words it can be found more in the consistency of behaviors than in the articulation of intentions” (Mintzberg, 1987a, p.9).

This idea of deeply embedded perspectives within organizations links to the literature on the importance of institutionalized organizational arrangements, where purpose and strongly held values can bring legitimacy to strategic decision making, thus linking strategy and organizational purpose together (Ray and Ricard, 2019), which may help to reconcile tensions between competing institutional logics or modalities (Dahmann and Grosvold, 2017).

Intentionality and commitment (Mintzberg 1987b; Drucker, 1989; Hamel and Prahalad, 1994, 1996, 2005; Mintzberg et al., 1998; Collins, 2001) also play a key role in driving organizational performance, often through a shared vision with a strong cultural and/or values perspective (Senge, 1990; Collins and

Porras, 1996; Moon, 2012). This links to the literature on leadership and the importance of mindset or metanoia, the worldview and sense of commitment that leaders embody within the organization (Senge, 1990; Gorzynski, 2018) and the capacity for insight and foresight that underpin present and future capabilities and provide the foundation for long term sustainability (Hamel and Prahalad, 1994, 1996, 2005). Short-term success is linked to a long-term sustainable strategic approach (Collins and Porras, 1996, 2005), which closely links the literature to the field of strategic thinking (section 2.4).

2.8.3 Organizational process models

Process frameworks examine the integration of the diverse elements that make up the strategic thinking process and the broader strategic processes within organizations. Liedtka (1998) argues that strategic thinking includes a strong sense of intent, has a systems perspective, involves a time dimension, is intelligently opportunistic and is hypothesis driven. These complex elements within the strategic thinking process make organizations more adaptable to change and enable them to create superior value. Moon (2012) discusses strategic thinking in terms of multiple complex processes based on different core ways of thinking (systematic, creative and vision driven), which are founded on a strong market orientation (Moon, 2012, p.1699).

Bonn (2001) recognises that strategic thinking manifests at both individual and organizational levels and thus seeks to integrate these micro and macro domains within the organization. She includes three main elements within the individual domain of strategic thinking; a holistic understanding of the organization, creativity and a vision for the future, which stress not only a process orientation for strategic thinking but emphasise the link between strategic thinking and the ability to see the big picture, the whole as well as the parts. These examples are part of a deep strand of literature that sees strategic thinking as a way of thinking, which incorporates a broad range of diverse perspectives and capabilities (section 2.3; Mintzberg, 1987a, 1987b, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012).

One of the most influential scholars in this area is Mintzberg, particularly his views on strategy as an emergent as well as a deliberate process (Mintzberg, 1987a; Neugebauer, Figge and Hahn, 2015), a stream of actions, which may be seen as a fluid learning process, one which is creative and open to innovation, influenced by commitment and intuition; a process that he compared with the craft approach of a potter:

“Now imagine someone *crafting* strategy. A wholly different image likely results, as different from planning as craft is from mechanization. Craft evokes traditional skill, dedication, perfection through the mastery of detail. What springs to mind is not so much thinking and reason as involvement, a feeling of intimacy and harmony with the materials at hand, developed through long experience and commitment. Formulation and implementation merge into a fluid process of learning through which creative strategies evolve” (Mintzberg, 1987b, p.66).

Mintzberg’s work leads into a broader and more inductive understanding (moving from observing the process of strategy towards theory development) of the inherently interconnected nature of the strategic process. This broader, more holistic perspective of strategic thinking has built on the complex nature of

strategic decision making (Mintzberg, 1994) and links to the literature on the way in which organizations learn (theories on the learning organization), which link learning capabilities to organizational success (Senge, 1990). Other scholars seek to integrate different perspectives within the strategic process. Calabrese and Costa (2015) look at the thinking process underlying strategy (which they call 'strategizing') and how it links with innovation by considering an abductive approach that includes both rational thinking *and* insight and intuition, thus departing from a strictly analytical, cognitive approach but not disregarding it entirely (following on from Mintzberg, 1987a, 1994; Bonn 2001, 2005).

2.8.4 Other internal frameworks

There are many other internal organizational streams in the literature, which potentially impact on the strategic thinking process. Three further areas are discussed below; cognitive approaches (Stubbard 1989), including strategic decision-making in entrepreneurial organizations and family firms (McCarthy and Leavy, 2000; Karami, 2007; Haynie et al., 2010; O'Regan et al., 2010; Groves, Vance and Choi, 2011), leadership theory (Collins, 2001; Drucker, 2004; Gardner and Laskin, 2011; Gorzynski, 2018) and the embedded nature of strategy (Granovetter, 2005), which builds on principles in sociology that link social structure to economic outcomes.

The early development of strategic thinking failed to address the cognitive dimension of decision-making adequately, *how* strategic decision-makers actually think. Cognitive approaches, utilizing human psychology and personal experience, address this gap and managerial cognition provides a "missing link in strategic management research" (Stubbard 1989, p.327). Bonn (2001, 2005) recognises that strategic thinking manifests at both individual and organizational levels and thus seeks to integrate these domains by understanding the *ability* to think strategically. The emphasis on strategic thinking as a way of thinking (section 2.3) reinforces the cognitive link but also includes more embodied forms of thinking; intuition, creativity and so on (Mintzberg, 1987b, 1994).

Entrepreneurial firms and small and medium-sized organizations provide an additional context for understanding how strategic thinking actually happens. The nature of the strategy process is non-linear in entrepreneurial firms (Karami, 2007), using intuitive learning modalities as well as rational planning models in strategic decision making, which links to the literature on emergent strategic processes (Mintzberg, 1987a; 1994; Neugebauer, Figge and Hahn, 2015). The intuitive learning model of strategy formulation focuses on internal factors rather than the external dimensions of the organization including culture, leadership and organizational history (McCarthy and Leavy, 2000).

Entrepreneurs are often seen as breaking the mould of conventional thinking. Haynie et al. (2010) argue that the ability of entrepreneurs to transcend conventional strategies derives from what they term metacognition, "cognitive processes that may enable entrepreneurs to think *beyond* existing knowledge structures and heuristics, to promote adaptable cognitions in an entrepreneurial context" (Haynie et al., 2010, pp.217-218, *italics in original*). Simply put, entrepreneurs think differently as a result of their personal experiences, hard wiring and circumstances. Although the authors use the term metacognitive strategy rather than strategic thinking the decision-making space is a shared one. The role of leadership

(and personality) characteristics, such as intuition, intentionality and humility (Collins, 2001; Gorzynski, 2018) in strategic decision making are also important.

Non-linear thinking plays an important role in the strategic decision making process of entrepreneurial endeavours, including intuition, creativity, insight and emotions (Groves, Vance and Choi, 2011), the specialized nature of decision-making process in family firms (O'Regan et al., 2010) and the tendency of entrepreneurs to break industry rules by developing new strategies based on unique and innovative approaches to meeting customer needs, which differentiate them from existing industry incumbents. This links to the wider literature on leadership, including the importance of storytelling and narrative in leadership (Gardner and Laskin, 2011).

Leadership theory covers a very broad area, some of it tangential to strategic thinking, but elements can be applied to the strategic decision-making process, particularly in specific contexts. One strand focuses on the personal characteristics of leaders, particularly their ability to do things differently and see opportunities not readily identified by others. Bennis and Thomas (2002) look not only at essential leadership skills but also at the role that crisis (crucible events) play in forging effective leaders. The literature highlights a complex range of human capabilities that extend beyond intellectual thinking, including emotional intelligence (Goleman, 1996, 2004), the ability to engender trust (Drucker, 2004) and the importance of factors such as personal commitment, humility and resolve in the making of a leader (Collins, 2001). Goleman (2004) points out that emotional intelligence (associative or relational thinking) is required in leadership in addition to intellectual intelligence:

“It's not that IQ and technical skills are irrelevant. They do matter but mainly as ‘threshold capabilities’ ... emotional intelligence is the sine qua non of leadership. Without it a person can have the best training in the world, an incisive, analytical mind, and an endless supply of smart ideas, but he still won't make a good leader” (Goleman, 2004, pp.4-5).

The rise of large technology giants with highly active founders or CEO's over the past twenty years (Steve Jobs at Apple, Jeff Bezos at Amazon. Mark Zuckerberg at Facebook) and strong family dynasties and entrepreneurs (Samsung, Tata, Alibaba Group) has sparked further interest in the field of leadership and has led to a recognition of the critical role that the personality and the characteristics of the founder can play within the leadership process (Gardner and Laskin, 2011; Gorzynski, 2018). However, the literature on leadership is complex and nuanced. Collins (2001), for example, draws attention to the importance of humility in leadership, which becomes powerful when combined with a strong commitment to the task; “an executive in whom genuine personal humility blends [*paradoxically*] with intense professional will” (Collins, 2001, p.67, researcher italics). Other scholars point to the importance of the inner aspects of leadership (Greenleaf, 1977; Covey, 1989; Senge, 1990; Korac-Kakabadse, Kouzmin and Kakabadse, 2002). Drucker (2004) discusses the importance of trust, humility and collective endeavour in his eight key practices of effective leadership:

“Don't think or say ‘I’. Think and say ‘we’. Effective executives ... have authority only because they have the trust of the organization. This means that they think of the needs and the opportunities of the organization before they think of their own needs and opportunities. This ... may sound simple; it isn't, but it needs to be strictly observed” (Drucker, 2004, p.21).

Social factors, including trust, affect economic outcomes, particularly in the form of social networks (Granovetter, 2005). This is one way in which the organization links itself to the outside world. Thus strategy is embedded within the social structure of the organization, in strong internalized norms and values (sections 2.8.1 to 2.8.2), and its realization may, counter-intuitively, depend more on weak rather than strong ties:

“Collective action ... is more likely in groups whose social network is dense and cohesive, since actors in such networks typically internalize norms ... and emphasize trust ... More novel information flows to individuals through weak than through strong ties. Because our close friends tend to move in the same circles that we do, the information they receive overlaps considerably with what we already know. Acquaintances, by contrast, know people that we do not and, thus, receive more novel information ... Moving in different circles from ours, they connect us to a wider world” (Granovetter, 2005, p.34).

2.8.5 External frameworks: Systemic

There are a broad spectrum of external organizational frameworks, including those drawing on the physical sciences, for example, ecology and complexity (Eisenhardt and Sull, 2001; Iansiti and Levien, 2004; Zahra and Nambisan, 2012), chaos and the new sciences (Sanders, 1998), systems thinking (Senge 1990; Mele, Pels and Polese, 2010), sense making (Kurtz and Snowden, 2003; Snowden and Boone, 2007; Whittle, Housley, Gilchrist, Mueller and Lenney, 2015) and the complex and turbulent nature of the environment and consequential sustainability issues (Frame, 2008; Neugebauer, Figge and Hahn, 2015). Some frameworks have both internal and external dimensions, for example, the relationship between systems theory and the learning organization (Senge, 1990). Strategy, at its most basic level, involves matching internal capabilities with the needs of the external environment. In essence, it is about relationship.

Systems thinking sees the world as an interconnected whole rather than being made up of separated parts (Senge 1990). It stresses the importance of “understanding the interactions and relationships between the whole and its parts, and between different interdependent systems” (Hurth, 2017) and requiring an ongoing dialogue between considerations of the whole (holistic thinking) and the parts (reductionist thinking) (Mele, Pels and Polese, 2010). It is thus interconnected and integrated. It is about how things relate together.

Goldman and Casey (2010, p.210) define strategic thinking as “conceptual, systems-oriented, directional, and opportunistic thinking” (Goldman and Casey, 2010, p.210) linking systems thinking directly to strategic thinking (Liedtka, 1998; Bonn, 2005; Moon, 2012). Both strategic thinking and systems thinking see things as interconnected and holistic (Liedtka, 1998; Bonn, 2001, 2005; Goldman and Casey, 2010; Moon, 2012) and seek to make sense of the deeper patterns and events, the underlying and interrelated structure of things. This echoes Mintzberg’s comments on strategic thinking; that “it is, by its nature, complex and difficult” (Mintzberg, 1994, p.111). Strategic thinking is thus concerned with how all the bits fit together and how they influence each other:

“In addition to understanding the external business ecosystem in which the firm operates, strategic thinkers must also appreciate the inter-relationships among the internal pieces that, taken together, comprise the whole. Such a perspective locates, for each individual, his or her

role within that larger system and clarifies for them the effects of their behaviour on other parts of the system, as well as on its final outcome" (Liedtka, 1998).

There has also been a steady rise of interest in the application of the natural sciences to strategic and organizational management. A number of external frameworks draw on the physical sciences, including complexity, chaos and change (Eisenhardt and Sull, 2001; Sanders, 1998), ecology and ecosystems (Iansiti and Levien, 2004; Zahra and Nambisan, 2012) and models borrowed or adapted from the wider scientific community such as the importance of diversity in organizations, which builds on Ashby's law of requisite variety in cybernetics (internal adaptability must be equal to, or exceed, the level of disturbance in the external environment, expressed as "only variety can absorb variety" (Schwaninger, 2004, p.517; Ashby, 1957, p.207):

"The crucial concept here is 'requisite variety' ... this law is *the fundamental law of management*" (Schwaninger, 2004, p.517, italics in the original).

The statement by Schwaninger above may appear to be remarkable and, perhaps, an exaggeration. However, in common with much of this literature strand, it is founded on the understanding that organizations are deeply interconnected, both internally and with the external environment. It is important to note that this literature is not all new and links back into the wider extant body of the organizational and strategic literature. Indeed, the importance of aligning an organization's internal and external environments is a core concept within the strategic literature.

The natural sciences provide models and frameworks that enable a more interconnected approach. Sanders (1998) references the science underpinning chaos, complexity and change to suggest that strategic thinking has two key components: "insight about the present and foresight about the future" and suggests "visual thinking" as a process that enables us to link "our intuitive sense of events in the world with our intellectual understanding" (Sanders, 1998, p.10). This literature strand often adapts holistic and connected frameworks that recognise the world as interdependent with, rather than independent of, the organization:

"In order to think and act strategically we must first understand the context in which our decisions are being made. We need to see and understand the world as an interconnected whole, where our thoughts and actions influence and are influenced by many *unknowns*" (Sanders, 1998, p.4, italics in original).

Eisenhardt and Sull (2001) suggest an approach to strategy that is influenced by complexity theory and based on identifying simple rules rather than founded on position or resources, a strategic response more aligned to rapidly changing, turbulent and complex environments. Iansiti and Levien (2004) recognise that success depends on the collective health of all the organizations that influence the business, understanding what networks exist between them and which of these are most important to the organization (so-called keystone organizations).

Zahra and Nambisan look at the collaborative *and* competitive nature of relationships in entrepreneurial organizations, suggesting that there is close link between strategic thinking and entrepreneurship expressed through "creating, shaping, navigating and exploiting business ecosystems" (the long term

evolutionary relationships between industry players, both established and new ventures) that produces “productive co-specialization” and even sparks innovation (Zahra and Nambisan, 2012, pp.219-220). This is linked to the idea of co-opetition (Nalebuff and Brandenburger, 1997), which recognises that co-operation and competition exist simultaneously in complex and rapidly changing environments and seeks to move away from a competitive paradigm based solely on winners and losers (section 2.7).

Although these models adapt holistic scientific concepts to a business environment they are often framed within a competitive business paradigm (Nalebuff and Brandenburger, 1997; Iansiti and Levien, 2004; Eisenhardt and Sull 2001; Zahra and Nambisan, 2012). As a result, they are connective frameworks and offer the benefits of a more holistic approach, but they often operate within the limitations of that paradigm, particularly in commercial organizations that have a strong profit orientation. As a result, it is important to also consider the literature specifically on not-for-profit organizations (section 2.9.1).

Other frameworks are process-oriented, seeking to promote deeper ways of thinking through reflective processes that reframe existing thinking patterns. Sense-making, the process of making sense and/or giving meaning to experience or developments (Kurtz and Snowden, 2003; Snowden and Boone, 2007; Whittle et al., 2015) has generated internal and external frameworks that aid strategic decision-making. The Cynefin model (Kurtz and Snowden, 2003; Snowden and Boone, 2007), is designed to help decision-makers make better decisions by understanding the context within which those decisions are made. It differentiates between five different contexts or domains (simple, complicated, complex, chaotic and disorder), each of which requires a different type of response, thus allowing the process behind strategic decision-making to be deepened, more aligned and thus more effective. It does this by providing a framework that generates a bigger contextual picture, which connects it with the process of strategic thinking.

Other sense-making frameworks can offer similar benefits. By examining the links between discursive leadership and strategic sense-making, for example, researchers have been able to observe how a radical shift occurred in sense-making through frame-breaking and then re-framing existing organizational categories of knowledge and the related reasoning process (Whittle et al., 2015). Discourse has been seen as a strategic resource by some authors because of its ability to highlight connectivity, particularly in meaning (Hardy, Palmer and Phillips, 2000).

Literature focused on sustainability and current environmental issues emphasises the complexity of the natural world, which is characterised by turbulence and uncertainty. As the environmental problems are complex and wicked (Frame, 2008; defined in chapter 1, section 1.6) they suit emergent strategic processes (Neugebauer, Figge and Hahn, 2015, drawing on Mintzberg, 1994). Furthermore, these uncertainties call for “intrinsic value-laden judgments” to be accommodated in decision-making (Frame, 2008, p.1113) suggesting a less analytical and more value oriented approach to strategy. The authors believe that the emergent nature of strategy is not fully recognised in the sustainability literature:

“The fact that sustainability research turns a blind eye to emergent strategy making hinders a better understanding of the strategy-making processes as well as the successful implementation of more sustainable practices” (Neugebauer, Figge and Hahn, 2015, p.2).

This blind spot may be important. Recognising that the natural world is a complex environment, characterized by turbulence and uncertainty, may elicit a more complex response, one that may be aligned to a more emergent strategy. It thus links the environmental context directly with the literature on the strategic thinking process:

“[*The*] view of strategy making as a creative, dynamic, responsive, and often intuitive, process within the framework of a largely unpredictable environment fits ... closely with the concept of strategic thinking” (Graetz, 2002).

2.9 Holistic thinking: Societal and unitive

The framework summarising the evolution of strategic thinking (figure 1, section 2.6) illustrates a spectrum of perspectives from a competitive paradigm focused on individual actors to more holistic frameworks, which emphasize a deeper level of inter-connectivity and mutuality, both in terms of strategic thinking (Mintzberg, 1987a, 1987b, 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010; Moon, 2012) and broader strategic and organizational frameworks (Senge, 1990; Sanders, 1998). The focus on a more holistic approach has increased over time, albeit often within an overall competitive paradigm.

Holistic frameworks go beyond those that simply integrate the interconnectivity found in the natural world, scientific and philosophical disciplines, but retain the overall competitive paradigm. They reflect bodies of knowledge that have a broader or deeper theoretical perspective, sometimes societal, philosophical, ethical or spiritual, and often one that sees the world in terms of unity rather than separation. This broadly-based literature is best seen as a spectrum rather than a simple categorization, where the nature of the holistic approach reflects the academic discipline and body of literature from which its drawn. It is not easy to pigeon-hole the literature. Often different perspectives overlap and the categorization is indicative.

Holistic frameworks consist of sector-specific literature with a focus on societal needs (section 2.9.1) including studies of organizations with a strong environmental or sustainability remit (Starik, Throop, Doody and Joyce, 1996; Aragón-Correa 1998; Dyllick and Hockerts, 2001; Hawken, Lovins and Lovins, 2005, 2007; Husted, 2013; Ramirez and Selsky, 2014) and more unitive frameworks (section 2.9.3), which include broader or deeper theoretical perspectives, which see the world in terms of unity (mutuality, collectivist, collaborative, community or co-operatively based) rather than separation (Singer, 1994; Bradbury and Clair 1999; Stead and Stead 2000; Bradbury, 2003; Vaara and Durand 2012; Devinney, 2013).

Unitive frameworks are multi-disciplinary and drawn from a broad range of academic disciplines. They includes more embodied theories of thinking and knowing, including multiple intelligences (Gardner, 1993, 1995, 2003, 2011; Goleman, 1996. 2004; Zohar and Marshall, 2001; Minocha and Stonehouse, 2007; Robinson, 2011), mindful thinking (Ndubisi, Nygaard and Capel, 2019) and approaches based on science, including complexity and chaos theory (section 2.8.5).

2.9.1 Societal: Sector-specific mutuality (including not-for-profits)

Organizations that are driven by a societal remit or collective purpose, many of which are not-for-profit organizations, exhibit a strong sense of mutuality and community and are focused on purpose or mission rather than profit (Drucker, 1989; Beng Geok, 2018). They “start with the performance of their mission ... [and] devote a great deal of thought to defining [it]” (Drucker, 1989, p.89). This sense of mission or collective sense of purpose (BoardSource, 2005; Beng Geok, 2018) requires organizations with a societal remit (including those outside the not-for-profit sector) to look outside themselves, which contributes to a broader perspective:

“A well-defined mission serves as a constant reminder of the need to look *outside* the organization not only for ‘customers’ but also for measures of success. The temptation to content oneself with the ‘goodness of our cause’ - and thus to substitute good intentions for results - always exists in nonprofit organizations. It is precisely because of this that the successful and performing nonprofits have learned to define clearly what changes outside the organization constitute ‘results’ and to focus on them” (Drucker, 1989, p.89, italics in original).

Organizations with strong societal remits are found across, and sometimes beyond, the not-for-profit sector, but this review focuses primarily on the environmental sector, the research study field. It briefly summarises the traditional research in the field, much of which is partially rooted within a competitive paradigm (Starik et al., 1996; Aragón-Correa 1998; Dyllick and Hockerts, 2001; Hawken, Lovins and Lovins, 2005, 2007; Runhaar, Tigchelaar and Vermeulen, 2008; Husted, 2013; Ramirez and Selsky, 2014) before looking at more holistic models (Singer, 1994; Bradbury and Clair 1999; Stead and Stead 2000; Bradbury, 2003; Vaara and Durand 2012; Devinney, 2013) and the contribution of the research in the not-for-profit sector (Hatten, 1982; Drucker 1989; BoardSource, 2005; Low, 2006; Beng Geok, 2018). This discussion is complemented by the research into a connection with nature in the nature-based literature review (section 2.11).

The importance of changes in the world’s natural environment for organizations has been recognised for some time in the academic literature (Starik et al., 1996; Bradbury and Clair, 1999; Stead and Stead, 2000; Dyllick and Hockerts, 2001; Husted, 2013) and the language can sometimes be forceful, reflecting the urgency of current environmental challenges and issues; “there are real problems out there, which need real solutions—urgently ... [*because*] the world cries out for repair” (Husted, 2013, p.195, quoting Margolis and Walsh, 2003, p.268, researcher italics). These issues “ultimately threaten us all” (Husted, 2013, p.197).

A key strand of this literature is focused on commercial organizations developing sustainable policies and/or “green competences” (Pérez-Valls, Céspedes-Lorente and Moreno-Garcia, 2016, p.529), often linked closely to competitive advantage. This includes potential challenges and costs from environment-specific factors such as energy scarcity, government regulations (such as carbon offset and other climate control measures) and also opportunities that arise from developing sustainable business practices aligned *with* the natural world rather than at the expense of it (Hawken, Lovins and Lovins, 2005, 2007).

This literature has a strong emphasis on sustainability but it is also seeking to demonstrate that working with nature can deliver strong benefits for organizations including enhanced profitability, stressing the clear commercial advantages of an approach that Hawken, Lovins and Lovins (2005, 2007) called natural capitalism and whole-system thinking. Their work contains plenty of practical examples of how organizations might achieve this win-win situation:

“Whole-system thinking can help managers find small changes that lead to big savings that are cheap, free, or even better than free (because they make the whole system cheaper to build). They can do this because often the right investment in one part of the system can produce multiple benefits throughout the system” (Hawken, Lovins and Lovins 2007, p.253).

This literature focuses on a win-win strategy whereby, “business strategies built around the radically more productive use of natural resources can solve many environmental problems at a profit” Hawken, Lovins and Lovins (2007, p.145) thus linking sustainability directly to organizational profitability and/or competitive advantage in the marketplace. However, it also places a critical importance on the environment itself, often in relation to its role as humanity’s life support system, strongly reflecting a whole-system thinking (or holistic) perspective:

“The natural environment is likely to become a primary concern of human organizations, as our past and current relationships with nature have contributed significantly, if not caused entirely, numerous wide-scale problems that appear to threaten the prosperity that some of us have come to take for granted” (Starik et al., 1996).

Many sustainability articles argue that “on a finite Earth the depreciation of ‘natural capital’ ... cannot go on endlessly” (Dyllick and Hockerts, 2001, p.132) and recommend alternative strategic approaches, for example, a triple bottom line approach encompassing economic, social and natural capital (Dyllick and Hockerts, 2001), thus moving away from a perceived separation between humankind and the environment. Ramirez and Selsky (2014) offer a socio-ecological approach to environmental strategy, arguing that the use of scenarios allows additional insight and brings greater adaptability into the strategic planning process, allowing an organization to surface and challenge assumptions that it holds about its environment, something that is particularly necessary in times of turbulent change. This allows the organization to consider how it might coevolve with its environment, an approach which reflects a more holistic, interdependent approach to strategy.

Aragón-Correa (1998) argues that “a widespread feeling of concern for the natural environment necessarily affects the economy in general”, an acknowledgement that organizations need to adopt a more holistic viewpoint of their relationship with the natural world, and concludes that proactive business strategies are linked to deployment of “preventive natural environmental approaches” Aragón-Correa (1998, p.556) in addition to traditional corrective measures, thus linking the way in which an organization considers the natural environment to its strategic process.

Much of the literature is focused on commercial, normally large, organizations (sustainability strategies and securing a more holistic alignment with the natural world). The literature on the relationship between small and medium-sized organizations and the environment also tends to focus on commercial organizations, very often on sustainability issues (Williams and Schaefer, 2013; Bakos, Siu, Orenge and

Kasiri, 2020). Overall, there is a paucity of research on the nature of strategic thinking within small and medium-sized environmental organizations, which extends to the environmental sector as a whole (Kendall and Knapp, 1996; Clifford et al., 2013).

There is a need, therefore, to rely on the broader not-for-profit and SME literature. Runhaar, Tigchelaar and Vermeulen (2008) recognise that environmental leaders in SMEs are not homogenous and may vary in their “scope, market position, values and practices”, with a distinct difference between those that are responding to customer demands, those that see a commercial opportunity and SMEs that are “green from an ideological motive” (Runhaar, Tigchelaar and Vermeulen 2008, p.177).

Hatten (1982, p.93) asserts that “strategic thinking can significantly improve the quality of not-for-profit management”. However, adapting the principles of corporate strategy to not-for-profit organizations in order to benefit from strategic thinking, whilst generating “less unworkable conflict” (Hatten, 1982, p.104) can be challenging. Hurth (2017), on the other hand, sees a sense of purpose as the central characteristic and heart of the governance process in purpose driven organizations (section 2.9.2). This view is aligned with the work of Drucker (1989) who looked at the transfer of knowledge in not-for-profit organizations from the opposite direction to Hatten. He recognised that not-for-profit organizations are strongly purpose or mission driven, relational and:

“Nonprofits are generating a powerful countercurrent. They are forging new bonds of community, a new commitment to active citizenship, to social responsibility, to values. And surely what the nonprofit contributes to the volunteer is as important as what the volunteer contributes to the nonprofit. Indeed, it may be fully as important as the service, whether religious, educational, or welfare related, that the nonprofit provides in the community” (Drucker, 1989, p.93).

Overall, there is a paucity in the literature on small and medium sized organizations with a strong social remit. Beng Geok (2018) characterizes the area as relatively unexplored, as well as recognizing the inherent complexity of the strategic management process in these organizations:

“The lack of a central focus on profit maximization and return on investment did not make the job of managing these organizations easier, because the challenges were different. In place of profit maximization there is a large variety of purposes, missions and goals of multiple stake-holders, all of whom have claims on the organization” (Beng Geok, 2018, Preface, unpaginated).

“From a management perspective the basic question is whether the values-expressive character of these social organizations creates a special context for their management, and how this characteristic would affect the application of management concepts and practices that have been developed in response to the needs of for-profit organizations. This is an area of management to be explored” (Siong, 2018, Foreword to Beng Geok, unpaginated).

The nature of this research study adds to the process of this exploration.

2.9.2 Governance and the non-executive role (trustees)

The literature on the governance role in small and medium-sized not-for-profit organizations is limited and much of it relates to non-profits in the United States. The broader governance literature focuses on the responsibility of trustees within strategic decision-making, including strategic thinking (BoardSource, 2005; Beng Geok, 2018), the relationship between the trustees and the executive team under different

models of governance (Low 2006) and governance within firm level environmental sustainability (Heuer, 2012). There is also a key link between governance and organizational purpose (Hollensbe et al., 2014; Hurth, 2017). Hurth states that “setting, communicating and delivering an organization’s purpose is at the heart of governance” (Hurth, 2017, p.4).

The role of non-executives in the governance function is seen as critically important for not-for-profit organizations (BoardSource, 2005; Hurth, 2017; Beng Geok, 2018). Good governance requires the non-executive and executive teams to work together constructively, focusing on what matters most, which includes the organizational mission, vision and values, strategic thinking and organizational direction (BoardSource, 2005; Beng Geok, 2018).

There is a diversity in the governance models of not-for-profits. Low (2006) looked at governance within social enterprises and differentiates between a stewardship role (overseeing the executive team) and a democratic role (representing the interests of stakeholders). The concept of stewardship “emphasises the role of the board in their capacity as agents of shareholders and whose primary task is to utilise share capital in ways that will result in increased value” (Low, 2006, p.378), so there is a need to translate this role into a suitable form for not-for-profit enterprises, potentially overseeing the executive team in order to achieve the organization’s core purpose. One common interpretation is that trustees should provide strategic direction but the executive or management team should concentrate on implementation. A Board should thus “inspire action and monitor achievement” (Coulson-Thomas, 2013).

In a democratic participation model of governance, which is the dominant model in not-for-profits (Low, 2006), governance becomes more aligned to looking after the different interests of a broad range of stakeholders, which represent the community of interests that ‘owns’ the organization. In reality, hybrid governance models may also exist. Interestingly, Low found that although the democratic model dominates in not-for-profit organizations in general, the social enterprises that he studied were more likely to use a stewardship model. Nevertheless, most scholars recognise that meeting the needs of different stakeholders is critical to the success of not-for-profit organizations (Low, 2006; Hurth, 2017; Beng Geok, 2018).

Similarly, Heuer (2012) identifies three forms of sustainability governance (within a mixed organizational sample); Dominion-Leadership (human-centric), Ecologically Responsive Leadership (recognising non-market stakeholders as well as shareholders) and Servanthood Leadership, which is based on deeper values and principles that partners bring to an exchange and builds trust over the long term (Heuer, 2012, pp.89). Thus alternative governance models emphasise stewardship, a custodial role focused on organizational purpose, vision and mission, a strategic thinking role and the need to meet the needs of multiple stakeholders.

2.9.3 Unitive: Philosophical and spiritual

For Hawken, Lovins and Lovins, (2005, 2007) the sustainable use of resources represents only the first part of an organization’s journey towards natural capitalism. They suggest shifting to biologically inspired

production models and solutions-based business models and, critically, reinvesting in natural capital to protect the biosphere, a more holistic approach:

“Management is being told that if it wakes up and genuflects, pronouncing its *amendes honorables*, substituting biopolymers for polystyrene, we will be on the path to an environmentally sound world. Nothing could be farther from the truth” (Hawken, 2010, p.x, italics in original).

There is an emerging thread within the broader strategic literature on the importance of organizations developing a more radical interactive remit in response to broader societal issues. These are often moral and ethical issues, those that affect our collective wellbeing and/or survival or reflect wider philosophical and/or spiritual issues. This links back to leadership theory focused on a more communitarian approach, the leader as a ‘servant’ or representative for the greater good of the community or society as a whole, which is often a result of an inner journey (Greenleaf, 1977; Covey, 1989; Senge, 1990; Korac-Kakabadse, Kouzmin and Kakabadse, 2002). These issues are normally complex and do not necessarily fit comfortably into a traditional business context. They do, however, lend themselves to a holistic perspective.

Bradbury and Clair (1999) focus on the role of business in the transformation to a sustainable society. This involves a change in the way of thinking and the need to “enhance strategic thinking about environmental demands on the future of business” (Bradbury and Clair, 1999, p.63). Bradbury (2003) further develops the whole-systems approach to sustainable development by adapting it to a teaching context, which encourages students to link their inner and outer worlds, thus questioning the separation between their internal personal world and the external world. Our survival, she suggests, is dependent on becoming better systems thinkers (Bradbury, 2003, p.175).

Similarly, Stead and Stead (2000) argue for the development of new sustainable eco-enterprise strategies that are founded on planetary needs:

“Enterprise strategy provides an accepted theoretical framework for integrating the moral responsibilities of organizations into their strategy formulation and implementation processes. We argue that, when extended to the ecological level of analysis, enterprise strategy provides a sound theoretical framework for ethically and strategically accounting for the ultimate stakeholder, planet Earth” (Stead and Stead, 2000, p.313).

Interestingly, enterprise strategy includes a clear ethical/moral ethos, requiring an organization to integrate ecological concern into its strategic processes, consider what it stands for in the light of its core values and ethical systems, and plan its long-term strategy, including its relationships with its key stakeholders. It explicitly recognises that “the Earth is a legitimate stakeholder ... [*from which*] can emerge a strategic management system designed to efficiently and effectively serve the interests of the planet and its green representatives in the immediate business arena” (Stead and Stead, 2000, p.313, researcher italics). It links business directly to a deeper environmental purpose.

Vaara and Durand (2012, p.248) suggest that “strategy scholars should be bold enough to look beyond the management of business firms to address contemporary issues of broader societal relevance.” Singer (1994) extends this to greater awareness that moral and ethical issues are important in their own

right within the remit of strategy and that moral philosophy might be integrated more fully into the strategic process to balance economic self-interest.

Devinney (2013) focuses on the integration of non-market issues (social, cultural, geographical, environmental and climate change factors) into the business environment and organizational strategic processes of multinational enterprises ('MNEs'). "We need a more fundamental rethinking of our theories of the MNE and global strategy that addresses ALL aspects of strategy without recourse to notions that some are 'market based' and others are not" (Devinney, 2013, p.198, original capitalisation).

This literature stream is not mainstream but it does provide evidence that there is a growing concern that traditional strategy fails to incorporate broader societal issues more fully. The idea, however, that business involves a broader corporate social responsibility ('CSR') is widespread (Kudlak and Low, 2015). CSR theory suggests that business has a role to play in tackling contemporary social and environmental problems, which cannot be tackled by governments and other public bodies alone.

The extent and nature of this role is still debated, and sometimes contested (Porter and Kramer, 2006, 2011). Porter and Kramer prefer the concept of 'corporate social value' to CSR and insist that this should be founded on a competitive paradigm, "integral to profit maximization", and that value should be defined as "economic and societal benefits *relative* to costs", not simply as "doing good" (Porter and Kramer, 2011, p.16, researcher italics). Creating shared value is tied fundamentally to economic value and "is not social responsibility, philanthropy, or even sustainability, but a new way to achieve economic success" (Porter and Kramer, 2011, p.4). This view is contentious because it "ignores the tensions between social and economic goals" (Crane, Palazzo, Spence and Matten, 2014, p.136) and the importance of engendering collaborative solutions to complex social and environmental issues (Khan, Kakabadse and Kakabadse, 2015). As a whole, the literature has moved towards the acceptance of societal as well as profitability goals within commercial organizations.

2.10 Multiple intelligences

The concept of multiple intelligences originates outside the business literature from psychology (Gardner, 1993, 1995, 2003, 2011) and has been applied to other areas, particularly education and creativity (Robinson, 2011). Gardner defines an intelligence as "a capacity, with its component processes, that is geared to a specific content in the world" (Gardner, 1995, p.202) and these capacities are expanded beyond intellectual abilities alone to include linguistic, logical-mathematical, musical, spatial (visual), bodily-kinaesthetic, naturalist and inter- and intra-personal intelligences (Gardner, 1993).

The literature relating to multiple intelligence encompasses a range of capabilities that have been applied within the business literature to expand beyond head or mind-based intelligence (cognitive, mental, rational and analytical; Porter, 1991, 1996). These include a broader spectrum of human sensibilities or intelligences including the heart (emotional, affective, relational; Goleman, 1996, 2004), body (intuition, gut feelings, the senses; Mintzberg 1994; Minocha and Stonehouse, 2007; Shapiro, 2011, 2019), spirit (a deeper sense of knowing; Zohar and Marshall, 2001) and, importantly, a *mixture* of cognitive and more

intuitive thinking processes (Calabrese and Costa, 2015) linking “our intuitive sense of events ... with our intellectual understanding” (Sanders, 1998, p.10). Interestingly, this mirrors the key aspects of the connection process to nature that are identified in the nature-based academic literature (section 2.12); cognitive (mind-based), affective (heart-based) and behavioural (body-based) (Schultz, 2002).

The concept of multiple intelligences tends to be more explicit in the narrative of human endeavour, personal stories, which link our inner and outer worlds (Bradbury 2003), our internal sense of who we are, our understanding of the outside world and how we fit in. In the strategic literature it is, perhaps, most often visible in the leadership strand, where our psychological makeup as well as difficult and/or challenging life events often play a key role in forging leadership (Bennis and Thomas, 2002) or in the literature on the importance of purpose, mission, vision, values and organizational culture (section 2.8.2). Inevitably, the multi-dimensional nature of what it means to be human is complex, only partially captured in any one approach, and is expressed in many different ways. The concept of multiple intelligences is just one helpful way to move into this territory.

The exploration of a more embodied relationship within the strategic process is complex and fragmented within the literature body and covers a diverse range of approaches. Goleman (1996, 2004) focuses on the importance of emotional intelligence (associative or relational thinking) as well as intellectual intelligence in leadership (section 2.8.4). Zohar and Marshall (2001) extend this to spiritual intelligence and suggest that the range of “possibly infinite” capabilities identified by Gardner are represented within the three primary intelligences; intellectual, emotional and spiritual (Zohar and Marshall, p.4). Zohar defines spiritual intelligence as the way in which we “address and solve problems of meaning and value”, allowing us to “place our actions and our lives in a wider, richer, meaning-giving context” (Zohar and Marshall, 2001, pp.3-4). In short, meaning is fundamental for human beings and will impact the decision-making process.

Other scholars stress the importance of the human body. A behavioural connection to nature (the physicality of nature; being in and acting on behalf of nature) is one of the key forms of connection identified in the academic literature on nature connection (Schultz, 2002; Bragg et al., 2003; Nisbet, Zelenski and Murphy, 2009; section 2.12). Minocha and Stonehouse (2007) take this further by bringing attention to the importance of body-based intelligence within the field of praxis and suggest that:

“a conceptualization of strategizing that fails to consider strategists’ physicality and embodiment is incomplete. Stated more strongly, divorcing the body from our praxis is inhibiting the growth of practice itself. The body may act positively, negatively or neutrally in the strategic processes, impacting the effectiveness of processes themselves as well as the strategies chosen and their outcomes” (Minocha and Stonehouse 2007, p.437).

These scholars focus directly on a broader definition of human intelligence and the importance of a more embodied form of decision-making. There are also links to broader academic disciplines including psychology and the natural sciences. Embodied cognition, the idea that the body is more important for cognition than traditional cognitive science has recognised, looks at “body determinism”, how “the body might constrain or shape the mind” (Shapiro, 2011, p.122). Whilst this area of research is complex and relatively new, and a research program rather than a well-defined theory (Shapiro, 2019) it points to the

possibility of a greater degree of complexity in the linkages between the mind and body with profound implications:

“At stake ... are nothing less than profound and entrenched ideas about what we are – about what it means to be a thinking thing. Simply put, whether minds are ... embodied in ways yet to be explicated, [*which*] *matters* to our understanding of who and what we are” (Shapiro, 2019, p.1, second italics in original, researcher first italics).

Sanders (1998, p.10; section 2.8.5) explores concepts derived from complexity and chaos theory and concludes that visual thinking (the link between intuition and intellectual understanding) “is the key to strategic thinking” (p.15). This links this literature stream to the idea that strategic thinking is a *way* of thinking, a mindset that incorporates a broader range of capabilities and perspectives including cognitive, relational, holistic and embodied components (section 2.3). Mintzberg (1987a, p.16) describes strategy (as perspective) as “an ingrained way of seeing the world” and “an immensely complicated process, which involves the most sophisticated, subtle, and, at times, subconscious elements of human thinking” (Mintzberg, 1994, p.111). Graetz (2002) associates left brain thinking with the planning process and right brain thinking with the thinking component of strategy making. Strategy requires both emotional intelligence and intellectual intelligence, an approach that is “whole brained” (Graetz, 2002, p.460; Goleman, 1996; 2004, section 2.8.4).

Mindfulness-based business strategies (Ndubisi, Nygaard and Capel, 2019) place a similar level of importance on individual and organizational perspectives; the *way* in which people think and perceive the world:

“Mindfulness-based approaches hold that individuals' and organizations' ability to achieve reliable performance in changing environments depends on the way/manner they think: how they gather information, how they perceive the world around them, and whether they are able to alter their perspective to reflect the current situation or prevailing circumstance” (Ndubisi, Nygaard and Capel, 2019, p.433).

Praxis is another area where researchers may observe the role of multiple intelligences in strategic decision-making, particularly the relationship between thinking and practical action (section 2.5).

Mintzberg et al. (1998) capture the interconnectivity of the strategic thinking process in this regard:

“There are times when thought should precede action, and guide it ... Other times, however, especially during or immediately after major unexpected shifts in the environment, thought must be so bound up in action that ‘learning’ becomes a better notion than ‘designing’ for what has to happen. And then, perhaps, most common are a whole range of possibilities in between, where thought and action respond to each other” (Mintzberg et al., 1998, p.42).

As Mintzberg suggests there are times when our thoughts and our actions become one process and it may be here that the theory of multiple intelligences, or a broader sense of embodied thinking, has an important role to play within the context of strategic thinking.

2.11 Nature-based literature review

The nature-based literature review provides a contextual understanding of what it means to be connected with the natural world, from which a working definition of a connection to nature is drawn (section 2.12.3).

It also leads to a better understanding of how those working in the environmental sector perceive themselves and the work that they do.

The review covers academic literature on the connection to nature (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009) and those writing about the natural world; how they perceive themselves and the work that they do (McCarthy, 2009; Anthony, 2010; Macfarlane, 2013; 2019a, 2019b; Macdonald, 2014; Whyte, 2019).

A connection to nature contains cognitive, affective and behavioural components with the relational element often dominant (Schultz, 2002; Bragg et al., 2003; Nisbet, Zelenski and Murphy, 2009). Connection is an individual's "affective, *experiential* connection to nature" (Mayer and Frantz, 2004, p.504, researcher italics). It can be implicit, existing outside of conscious awareness (Schultz et al., 2004, p.31), express a sense of oneness (Kals, Schumacher and Montada, 1999; Clayton, 2003; Mayer and Frantz, 2004), focus on practical engagement (Clayton, 2003) and involves the "dissolution of boundaries and a sense of a shared or common essence between the self, nature, and others" (Dutcher et al., 2007 p.474).

Those writing about nature reflect these key aspects of connection, a strong emphasis on the importance of intrinsic as well as extrinsic value (McCarthy, 2009; Nicolson, 2013; Macfarlane, 2019a; Whyte, 2019) and links between a connection to nature (and a sense of place) and personal or cultural identity (Schama, 1995; Mitchell, 2002; Oliver 2009; Macdonald, 2014; Murray-Fennell, quoting Mavor, 2015). This emphasis on intrinsic or inherent value is also reflected within different streams of the mainstream academic literature (Senge, 1990; Collins and Porras, 1996; Bonn, 2001, 2005).

2.12 What do we mean by a connection to nature?

The word connection is derived from the Latin words, 'nexus' and 'com', meaning the linkage or association between two things or people. Nature refers to "the phenomena of the physical world collectively, including plants, animals, the landscape, and other features and products of the earth" (Google Dictionary, 2020; Appendix G). Although people often feel a part of nature (Vining, Merrick and Price, 2008) many common definitions assume that human beings and nature are separate (Google and Cambridge Dictionaries, 2020; Appendix G).

The academic literature on a connection with nature is complex. Vining, Merrick and Price (2008) found that even though the majority of participants in their research study "considered themselves part of nature (76.9%), natural environments were largely described as places absent from any human interference" (Vining, Merrick and Price, 2008, p.1), a contradiction, which "may reflect cognitive dissonance that can complicate decision-making and performing environmentally responsible behaviour" (Vining, Merrick and Price, 2008, p.10). A working definition of a connection with nature (section 2.12.3) is best developed from a wide review of the literature.

2.12.1 Environmental sector and literature definitions

Environmental organizations have commissioned academic research into what a connection with nature means to different people. The Royal Society for the Protection of Birds ('RSPB') adopted a simple, relational definition for a connection to nature as:

"The mix of feelings and attitudes that people have towards nature. You might also call it 'loving nature', having a 'sense of awe and wonder' or simply caring for the environment" (RSPB, 2013, p.4).

This definition is practical and includes four key aspects; an enjoyment of nature, an empathy for creatures, a sense of oneness and a sense of responsibility (RSPB, 2013, p.4). However, the underlying literature is more complex, a sense of connection often contains different components and a mix of perspectives. Just as each person is different so are the ways in which they relate to the natural environment.

Schultz (2002) defines a connection with nature by highlighting three primary elements that make up that sense of connection: cognitive (described as psychological connectedness; how integrated we feel with nature, our beliefs and knowledge), affective (our sense of caring for nature, our thoughts and feelings) and behavioural (our motivation "to act in the best interest of nature"; Schultz, 2002, p.68) expressed through our actions and experiences. Our sense of integration with nature increases when we have "cognitive representations of self that overlap extensively with (*our*) cognitive representations of nature" (Schultz, 2002, p.68, researcher italics). In other words, our connection with nature depends on the extent to which we feel we are part of the natural environment, the degree to which we include nature as part of our identity.

This sense of connection with nature is *implicit*, which Schultz et al. (2004, p.31) argue exists outside of conscious awareness. It arises from *within*. This idea of implicit connection runs through the literature. For example, the concept of oneness has been explicitly included in measurement instruments by Kals, Schumacher and Montada (1999), Clayton (2003) and Mayer and Frantz (2004). Connectivity describes a:

"Perception of sameness between the self, others, and the natural world. The experience of connectivity involves the dissolution of boundaries and a sense of a shared or common essence between the self, nature, and others" (Dutcher et al., 2007, p.474).

These themes are found in the broader literature. Vining, Merrick and Price (2008) found that perceptions of relatedness to nature were expressed in terms of connectedness (inter-dependence, inherent connection, shared essence, shared habitat, closeness), action (resource, recreation, residence, stewardship/harmony, interaction with animals, environmentally responsible behaviour) and affect (caring/responsibility, enjoyment, love, morality, spirituality/philosophy, peace/tranquillity and wellbeing).

Organizations supporting the natural world are normally referred to as environmental or animal welfare organizations for classification purposes (defined in chapter 3, section 3.7.7), so this terminology is used in this research study. However, the terms the natural world or nature are preferred in the context of

connection as the term environment is also used in the broad body of organizational and strategic literature as a synonym for all that is seen as external to an organization.

2.12.2 Measuring connectivity with the natural world

Much of the research into a sense of connectivity with nature has built on the three elements above (cognitive, affective and behavioural), often in the form of specific measuring instruments that seek to measure a connection with nature. A summary of key measuring instruments, the principle components of connection and their theoretical background is shown in Figure 2. Although several instruments are child-based the methodology review and theoretical background is not limited to children.

Figure 2: Connection with Nature: Measuring Instruments

Index	Dimensions	Definition of connection	Theoretical background
Connection to Nature Scale ('CNS')	Affective, cognitive	Affective, experiential	Mayer and Frantz (2004)
Nature Relatedness Scale ('NR')	Affective, cognitive, behavioural	Self (identification) perspective, experience	Nisbet, Zelenski and Murphy (2009)
Inclusion of Nature with Self ('INS')	Primarily affective (with elements of other two)	Inclusion of nature as part of our identity	Schultz (2002)
Environmental Identity Scale	Affective, cognitive, behavioural	Identification with nature and environmental causes (enjoyment, time in, learning, responsibility and 'oneness' with nature etc.).	Clayton (2003)
Emotional Affinity to Nature ('EAN')	Affective	Emotional affinity defined as love or affection based on four factors; love of nature and feelings of freedom, safety and oneness with nature	Kals, Schumacher and Montada (1999)
Connection to Nature Index ('CNI') (child-focused)	Affective, cognitive	Affective, experiential	Cheng and Monroe, 2010 (influenced by Mayer and Frantz, 2004)
Nature Connectedness Inventory (child-focused)	Affective	Affective, experiential	Ernst and Theimer (2011) adapted from Mayer and Frantz (2004)

Source: Bragg, Wood, Barton and Pretty (2013, pp.19-21), adapted by the researcher.

There are some differences in emphasis in the research studies above. Many researchers (Kals, Schumacher and Montada, 1999; Mayer and Frantz, 2004) stress the affective (emotional affinity) element of connection, "an individual's affective, experiential connection to nature" (Mayer and Frantz, 2004, p.504). Cognitive and behavioural factors are, however, also highlighted. Although the literature includes some discussion on the relative effectiveness of specific tools (Perrin and Benassi, 2009) and in some areas (most notably in the connectedness of children) there has been relatively limited research (Richardson, Sheffield, Harvey, Petronzi, 2015), all three dimensions of connection are widely recognised, with a general emphasis on the affective dimension.

Other definitions of a connection are more grounded and emphasise a relationship founded on physical proximity and immersion in the natural world when doing practical things, for example, the simple definition from a young person's perspective used by the RSPB:

"A first-hand experience of nature ... of a minimum of 30 minutes, where they can learn something and have fun" (RSPB, 2019, p.38).

This simple practical definition, emphasising both the extrinsic and intrinsic value of nature, also permeates the nature writing in environmental membership magazines, both physical and online, and other web-based material (section 2.13). It nicely captures the reciprocity of nature. We support nature but we also get back so much in return. A blog by Alistair Whyte, Head of Plantlife Scotland, for example, stresses the importance of protecting Lindenberg's featherwort (*Adelanthus lindenbergianus*), a rare liverwort found in only two remote places in the UK, first by summarising the extrinsic benefits and then by making an impassioned plea by referencing its intrinsic value:

"Then there's what some people would argue is the most important reason for making sure this tough little species has a fighting chance for the future. It's that it has intrinsic value in and of itself, no matter what it does for us, or for anything else. All species are important, be they polar bears, fen orchids, or Lindenberg's featherwort. We really can't afford to lose any more species through our actions, and if we can do something to look after a tough little liverwort that's made its home on a wet and windy mountaintop on the wrong side of the equator, then surely we *should*" (Whyte, 2019, research italics).

There is a strong alignment between the nature-based academic literature, nature writing literature and the online and physical magazines, articles, blogs and social media posts of environmental organizations. There is a shared emphasis on both extrinsic value (nature as humanity's life support system) and intrinsic value (nature's inherent value in its own right), a recognition of nature's importance at societal, community and individual levels, and a sense of crisis, the urgent need to move to a more connected relationship with the natural world:

"At its core it is a very simple idea: the more people experience, connect with, and share their love of nature, the more support there will be for its conservation" (Brooks, 2016).

Many of these words above ("love", "experience", "connect" and "share") are strongly relational, reinforcing the academic definition of nature connection, which has a strong affective component.

2.12.3 Working definition of connection

The key themes emerging from the nature-based literature review above provide the basis for a working definition of a connection to nature. A connection to nature is:

"A shared sense of identity, an experience of oneness, in part or whole, which enables us to love and care for the natural world and act on its behalf, recognizing both its extrinsic and intrinsic value."

2.13 Nature writing literature

The review of nature literature considers how those working in, and writing about, the natural world perceive themselves and the work that they do, thus providing an insider view of what it means to be connected to the natural world. The nature writing genre is broad and includes works on how writers see themselves and the work they do in relation to the natural world (McCarthy, 2009; Macfarlane, 2019a, 2019b; Whyte, 2019), the relationship, inherent meaning and cultural significance of landscape (Schama, 1996; Macfarlane, 2013, 2015), changes to the natural world over time and the changing seasons (Lewis-Stempel, 2014; Lister-Kaye, 2015) the nature and significance of place (Mitchell, 2002), the historical and cultural importance of the natural environment (Oliver, 2009; Murray-Fennell, quoting Mavor, 2015) and specific species and relationships with animals (Masson, 2005; O'Brien, 2008; Anthony, 2010; Macdonald, 2014). This is complemented by specialist magazines, both paid and membership based, and a thriving informational and campaigning presence for environmental matters on social media.

There has been a reawakened interest in the natural world, seen in the significant growth in the number, size, membership and volunteers of conservation and environmental membership organizations. The National Trust, for example, has grown its membership base from 3.5 million in 2007 to over 5.6 million in October 2019. Similarly, RSPB membership increased by some 100,000 between 2010 and 2018 to nearly 1.2 million. Other environmental organizations have seen similar proportional increases (chapter 3, section, 3.8.4). The size of the environmental sector (both the number and size of environmental organizations) has also expanded rapidly over the past decade (chapter 3, section 3.8.3).

Our relationship with the natural world is complex and a connection with it can be expressed in different ways; directly (flora, fauna, landscape; section 2.13.1), indirectly (cultural and/or community perspective; section 2.13.2) or through a narrative connection (the relationship between our sense of personal identity, who we are, and our relationship with the natural world; section 2.13.3).

2.13.1 Direct connection

There is a strong theme in nature writing of increasing disconnection with the natural world and the need to reconnect directly. Studies in the United Kingdom suggest that fewer than one in ten children play in wild places compared with 40% a generation ago (Natural England, 2009). A new edition of the Oxford Junior Dictionary in January 2015 removed some 50 common words describing nature, continuing a similar move in the previous edition in 2007 (Flood, 2015). Words such as catkin, chestnut and clover have now followed blackberry, bluebell, dandelion, kingfisher, heron, crocus and almond into obscurity, replaced by more contemporary words, suggesting that words describing the natural environment are seen as much less relevant for children today (Macfarlane, 2015, Flood, 2015).

Many nature writers focus on a sense of loss that has accompanied an increased sense of disconnection from nature and its consequences in our treatment of the natural world (McCarthy, 2009; Anthony, 2010; Macfarlane, 2013, 2015, 2019a, 2019b; Lewis-Stempel, 2014; Macdonald, 2014; Lister-Kaye, 2015). Their language is often relational, emotive and heart-felt, sometimes equating this loss with the importance of meaning in our relationship with nature:

"We are living through an age of loss, for which we are only just starting to find a language of grief" (Macfarlane, 2019a).

"The forest is always more complicated than we can ever dream of. Trees make meaning as well as oxygen. To me, walking through a wood is like taking a tiny part in a mystery play run across multiple timescales" (Macfarlane, 2019b, quoting Sheldrake in conversation).

Similarly, McCarthy talks of the importance of shifting base-line syndrome on societal disconnection with nature (each generation grows up with an understanding of how the natural world was when they were young and assumes this is how it always has been):

"[*This*] has masked from a general understanding the relentless war of attrition which humanity has pursued against nature. Succeeding generations are unaware of what has gone, and the endless erosion of the natural world which humans have carried on has not been seen as the primal human characteristic which it is" (McCarthy, 2009, pp.216-217).

Like many nature writers, McCarthy (2009) talks of the destruction of the natural world in terms of loss, not simply of the benefits and value of ecosystem services or even of nature as humanity's life support system, but at a deeper "soul" level, even "a loss of hope" (McCarthy, 2009, pp.9-10). McCarthy believes that humanity is close to reaching a point of no return, "sooner or later the war of attrition had to come up against something fundamental ... I rejoiced in [*the songbirds*] ... and for that unforgettable springtime, the world was still working. But for how much longer?" (McCarthy, 2009, p.226, researcher italics). This belief is widely echoed across the literature on the natural world, both academic and personal; "human survival is directly tied to our relationship with the natural environment" (Schultz, 2002, p.61).

These thoughts of imminent loss have been with us for longer than we remember. Robert Burns, the Scottish poet, expressed his remorse about humankind's deleterious effect on nature very powerfully in his poem, 'Tae A Moose':

"Wee, sleeket, cowran, tim'rous beastie
O, what a panic's in thy breastie! ...

I'm truly sorry Man's dominion
Has broken Nature's social union ...

The best laid schemes o' Mice an' Men
Gang aft agley".

Robert Burns (1759-1796) 'Tae A Moose' (To A Mouse) 1785

A stronger, more intimate, connection with the natural world remains in our language. The Welsh language, for example, is often rich in words that express a connection to nature but also incorporate wider and deeper meanings that include cultural and social identity, familiarity, surroundings, heritage and history, a relationship with the land, and a personal sense of identity and roots. As such they are not translatable directly into English at a cognitive level but rely on a range of sensibilities or intelligences to aid understanding (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011; section 2.10). These words include *hiraeth* (a strong sense of personal longing, yearning, nostalgia and attachment for home, place or land), *cynefin* (literally meaning habitat, the habitual tracks of sheep, but more broadly used as a personal and special place of attachment), *fy milltir sgwâr* (my patch or the place I'm from) and *bro*,

(literally region but used in the deeper, more personal, sense of the interrelationship between place, people, history, neighbourhood, culture and the land).

The definitions above can only be indicative. The layers of meaning are complex, contain a deep emotional attachment and a sense of belonging and connection that is not easily put into words:

“Landscape is more than a route to understanding; it actually *is* understanding” (Nicolson, 2013, p.ii, italics in original).

In practice, the connection with nature expressed by writers in the field can also be complex but it often encompasses a place where we can experience, feel and sense what it means to be human, re-connect with our bodies and the physical aspects of our nature and, for some writers, re-engage with our broader relatedness to the world around us and the inherent meaning in our lives, our spiritual dimension. It is often best represented not literally but through narrative, story and poetry because its value extends beyond itself:

“Landscape is a medium of exchange between the human and the natural, the self and the other. As such it is like money: good for nothing in itself but expressive of a potentially limitless reserve of value” (Mitchell, 2002, p.5).

This echoes sentiments about our connection to the natural world that have been expressed many times before by writers, poets and those simply observing the joys of being in nature. Gilbert White, a parson and keen naturalist (sometimes called Britain’s first ecologist) put it succinctly:

“These, Nature’s works, the curious mind employ,
Inspire a soothing melancholy joy.”

Gilbert White (1720-1793), *The Naturalist’s Summer Walk* (1841)

2.13.2 Indirect connection: Cultural and community identity

Our sense of connection to nature expands beyond a direct connection. We are also connected indirectly through the influence of the natural world on our cultural and community identity (our sense of place, explored through the Welsh language above). Our cultural or community identity may be shaped by our relationship with the natural world in ways that are not in our immediate consciousness. Historian, Neil Oliver begins his history of Scotland as follows:

“Before memory or history – beneath everything – is the rock. We are shaped and tested by it... It is the landscape that has authored the story of this place, and this people, far longer and more indelibly than any work of our own hands” (Oliver, 2009, p.1).

A connection to specific aspects of the natural world may be part of a broader, more holistic, sense of identity shared with others containing aspects of identity, culture, community and meaning. Huw Edwards begins his introduction to ‘The Story of Wales’ by Jon Gower by saying:

“My personal story is principally about Ceredigion, the Garw valley, and my native Llanelli. I am a product of these places... and yet all of us who claim a Welsh identity share one certain truth: each of us, regardless of our language or our region of origin, is part of the great story of Wales” (Edwards, 2012, p.ix; introduction to Gower, 2012).

Kate Mavor, Chief Executive of English Heritage, also sees the concepts of a sense of place, heritage and narrative as inextricably linked:

“Literally, heritage means what we’ve inherited from our forebears. However, on a much deeper level, it means a sense of place that is very closely tied up with a sense of our own identity, who we are, a sense of belonging and being part of a big narrative, which is the human story” (Murray-Fennell, 2015, p16, interviewing Kate Mavor).

2.13.3 Narrative connection: Personal meeting place with nature

Many of the authors above, writing in the personal form, are describing a narrative connection with the natural world, the unique meeting place between our sense of who we are (our personal identity) and our relationship with the natural world. They are telling personal stories as well as describing the natural world. Given the strong, and often important, personal dimension in a connection to nature, this is, unsurprisingly, complex and diverse.

2.14 Working definition of strategic thinking

There is no commonly agreed definition of strategic thinking. Although the literature review above contains widely differing definitions, most contain certain key elements, including a long-term orientation and direction, the creation of a sustainable strategic position, an understanding of what business the organization is in (or what purpose it serves), its scope and boundaries and a practical orientation, translating theory into practical action and/or what happens in practice within the decision-making processes (sections 2.2 to 2.10). The review of nature-based literature emphasises a holistic understanding of the world (big picture thinking), recognising interconnectivity within the whole (sections 2.11 to 2.13). A simple working definition of strategic thinking in the context of environmental organizations adopts these key elements:

‘The ability to see the whole combined with the capability to act on this understanding in order to build a long-term sustainable position.’

2.15 Conclusions

The framework summarising the evolution of strategic thinking (figure 1, section 2.6) illustrates a range of perspectives from a competitive paradigm, dominated by analytical and cognitive thinking, to more holistic frameworks, which emphasize a deeper level of inter-connectivity and mutuality, both in terms of strategic thinking (Mintzberg, 1987a, 1987b; 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010; Moon, 2012) and more connected strategic and organizational frameworks (Sanders, 1998; Senge, 1990; Kurtz and Snowden, 2003).

The increasing focus on a more holistic approach to strategic thinking, albeit often within an overall competitive paradigm, reflects the increase in the pace of change in the external environment, which has also become more volatile and turbulent as well as unpredictable (Neugebauer, Figge and Hahn, 2015).

A more holistic strategic framework is seen as critical in the creation of long-term sustainability in a more uncertain world:

“In the face of an unpredictable, highly volatile and competitive marketplace, a capacity for innovative, divergent strategic thinking at multiple organizational levels is seen as central to creating and sustaining competitive advantage” (Graetz, 2002, p.456).

The strategic and organizational literature is, in itself, complex, ranging from analytical, cognitive, planning oriented models (Ansoff, 1965; Porter, 1979, 1985, 1991, 1996) to Mintzberg's more process-oriented approach, which emphasises the importance of emergent as well as deliberate strategy (Mintzberg, 1987a; Neugebauer, Figge and Hahn, 2015). There is, however, a broad agreement that strategic thinking is a way of thinking, which incorporates a broad range of diverse perspectives and capabilities (section 2.3), is complementary to strategic planning (Mintzberg, 1994; Heracleous, 1998) and is a complex, continuous and intertwined process (Bonn, 2005). As a result, it is, perhaps, best understood from a combination of theoretical perspectives, within which a practical dimension is important (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015).

The literature focused on connection to the natural world and on multiple intelligences provide a range of perspectives on what a sense of connection to nature means, extending a purely head-based, intellectual understanding to a more diverse and embodied approach incorporating mind, heart, body and spirit. These more embodied ways of perceiving and connecting with nature tend to be interconnected and holistic, moving from a sense of separation to one of connection. In this sense there is an alignment between this literature and the increasingly holistic nature of the mainstream strategic and organizational literature over the past 40 years.

3. Research Methodology

3.1 Introduction

This chapter sets out the research objectives and questions, the overall research framework and outlines the research philosophy and approach. It discusses the research design, methods and data collection process and it also provides contextual information for the environmental sector in which small and medium-sized organizations operate. The choice of the research methodology is founded on the principle that we can best understand the potential value of a more holistic approach to strategic thinking by adopting a holistic, experiential, research framework using an inductive, ethnographic approach. The research approach is matched to the nature of the strategic thinking process.

The research perspective is interpretivist (ontological constructivism and epistemological interpretivism) giving it a “focus on meaning in context” (Myers, 2013, p.39), which is aligned to the complex and connected nature of strategic thinking (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010) The aim is to extract meaning from the deep, rich research data to contribute to developing new theory and providing greater understanding to practitioners. A pragmatic approach is taken that recognises the value of existing frameworks to inform rather than constrain new theory development. An ethnographer “enters the field with an open mind, not an empty head” (Fetterman, 1998, p.1).

Research methods are designed to capture rich, qualitative data using a triangulated multi-method approach, within an embedded case study setting, including individual and group interviews and participant observation. The research study comprised 42 interviews (38 individual interviews and four workshops) across the United Kingdom (covering 38 individual participants, representing 29 participant organizations).

3.2 Aim, objectives and scope of the research

The aim of the research is to explore the nature of strategic thinking from a wider perspective, moving beyond a simple Cartesian mindset (based primarily on intellect) to a more holistic approach that encompasses a range of human capabilities, or intelligences, ways of perceiving and understanding the world (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011; chapter 2, section 2.10). These include head (cognitive and analytical; Ansoff, 1965; Porter, 1991, 1996) heart (relational and emotional; Goleman, 1996, 2004), body (intuition and senses; Mintzberg, 1994; Minocha and Stonehouse, 2007; Shapiro, 2011, 2019), spirit (a deeper sense of knowing; Zohar and Marshall, 2001), as well as a mixture of cognitive and more intuitive processes (Calabrese and Costa, 2015; Sanders, 1998).

The underlying rationale of the research is that there is a value in our connection to the natural world, which contributes to an ability to see a bigger, more holistic picture within the context of the strategic thinking process within the participant research group. This initial rationale, the literature review and other a priori knowledge inform rather than constrain the research study. The research objectives, questions

and methodology are framed to be *open* to what *actually emerges* from the participant data, which forms the foundation of the participants' analytical story.

Given the conflicting views on the nature and process of strategic thinking (chapter 2, sections 2.3 to 2.5), the research approach is focused on exploring what, why and how strategic thinking happens in the field; what practitioners actually *do* (chapter 2, section 2.5). Choosing an inductive, ethnographic research approach ensures that it is the data collected from participants that will form the basis of any new theoretical development and fully recognises the importance of praxis in developing new theory (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015).

On this basis the aim of the research is broken down into three key research objectives:

1. To examine how and why a sense of connection with the natural world contributes to the ability of small and medium-sized environmental organizations to think strategically and to assess the value of this connectivity to these organizations.
2. To identify how this sense of connection contributes to the ability of small and medium-sized environmental organizations to achieve a range of broad objectives (both strategic and operational) with limited resources.
3. To examine how and why a more relational approach to strategic thinking, based on a sense of connection, challenges our existing understanding of strategic thinking.

3.3 Research questions

The research objectives explore how and why a sense of connection with the natural world impacts on the ability of small and medium-sized environmental organizations to think strategically (theoretical) and how this affects their ability in practice to achieve their purpose and objectives, sometimes with very limited resources (practical). The third research question looks specifically at how a more relational approach to strategic thinking challenges our current understanding of the discipline (contextual). These objectives can be expressed as three succinct research questions:

1. How and why does a sense of connection with the natural world contribute to the ability of small and medium-sized environmental organizations to think strategically?
2. How does this sense of connection contribute to the organizations' ability to achieve key strategic and operational objectives with limited resources?
3. How does a more relational approach to strategic thinking, based on a sense of connection, challenge our existing understanding of strategic thinking?

3.4 Conceptual research framework

The choice of the research philosophy, approach and methods is founded on the principle that we can best understand a more holistic approach to strategic thinking by adopting a holistic research framework using an inductive, ethnographic approach. The holistic nature of strategic thinking matches the rich “holism” of the research method, which has “strong potential for revealing complexity”, a critical area within strategic thinking (Miles et al., 2014, p.11). This approach is centred on capturing data that is both broad and deep enough to make sense of the complexity of strategic thinking within the participating organizations. It enables the emergence of meaning by looking at the feelings, perceptions, values, attitudes and motivations of research participants in the form of sense making (Rosen, 1991) to investigate the strategic thinking process from an *insider’s* perspective.

The research design adopts a triangulated multi-method approach, within an embedded case study context, comprising 38 individual interviews and four workshop events (including group interviews and participant observation). This rich, deep participant data forms the basis for the emerging participants’ story, where emerging theory and practical insights can be enfolded into the body of the extant literature (Eisenhardt, 1989). This takes a pragmatic approach that recognises the value of a priori frameworks within a broad research remit to inform rather than constrain new theory development.

The research study is focused on small and medium-sized environmental organizations on the premise that these provide an ideal context where a connection (in this case with the natural world) is important to fulfilling the purpose of the organizations, and therefore might be expected to impact on the nature of the strategic thinking process within them. Clearly, the research methodology is contextually bound in this respect and it is not possible to generalise the results (section 3.7.3). However, the opportunity to develop new theories that extend knowledge in the field is extended by identifying areas for additional research, which can explore whether insights generated by the data are also found elsewhere.

3.5 Research philosophy and approach

3.5.1 Philosophical perspective

Strategic thinking is a way of thinking, an “ingrained way of perceiving the world” (Mintzberg, 1987a, p.16) that is holistic, systemic and connected (Liedtka, 1998; Bonn, 2001, 2005; Goldman and Casey, 2010; Moon, 2012), which may contain rational as well as intuitive and innovative elements (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002). It is the part of the strategic process that “gives new meaning and insight to the process of strategic planning” (Graetz, 2002, p.461) and is part of the overall strategic process that may be emergent rather than deliberate (Mintzberg, 1987a; Neugebauer, Figge and Hahn, 2015). As Mintzberg et al. point out (1998, p.328, researcher italics), “the very meaning of emergent strategy [*is*] that single actions can lead to significant patterns of action.” Strategic thinking is thus, by its nature, complex and multi-dimensional (Mintzberg, 1994; Bonn, 2005) and it attempts to make sense of the world in relation to the strategic decision-making process.

Given this “focus on meaning in context” (Myers, 2013, p.39) the research study adopts an interpretivist research perspective (ontological constructivism and epistemological interpretivism) using an inductive, ethnographic approach within the context of an embedded case study. This approach provides “a context of meaning upon which to hang pieces of action ... meaning is *the* focus of investigation in the social constructionist case” (Rosen, 1991, pp.6-7). The objective of the research approach is to allow meaning to arise from the data with as little preconceptions as possible. This process of sense making involves a “dialogue between the preconceptions we bring to the study and the empirical data we have collected” (Wagenaar, 2011, p.244), and thus demands a level of self-awareness on behalf of the researcher.

The interpretivist research philosophy rejects an objectivist view that “meaning resides within the world independently of consciousness” (Collins, 2010, p.38). In fact, consciousness (in the form of different intelligences, sensibilities, worldviews and perspectives) may play an important role in the ability to think strategically, the capability to see a bigger, more complex picture. In other words, the research focuses on the “complexity of human sense-making” by attempting “to understand phenomena through the meanings that people assign to them.” (Myers, 2013, p.39).

3.5.2 Inductive methodology

Inductive research is rooted in deriving meaning and new theoretical development from empirical data. The world is understood from a subjective rather than an objective perspective, something separate from the researcher. Inductive research is data driven and begins with a set of empirical observations, identifying patterns, threads, insights, ideas and themes within the research context, which leads to new theory development. One of the key advantages of an inductive approach is the rich, deep data that is generated, which aids the identification of meaning underlying the data. Although the focus of the research (an embedded case study) means that it is not generalisable, theory development can be extended by further research. The deep, multi-layered and iterative nature of the inductive approach is aligned to the complex nature of both strategic thinking and a connection to the natural world.

The inductive, qualitative, research approach adopted is ethnography, which is “about telling a credible, rigorous, and authentic story” (Fetterman, 1998, p.1). It focuses on the complexity of human sense-making by focusing on meaning in context (Myers, 2013), reflecting a relativist ontology that places an emphasis on socially constructed and multiple meanings that are allowed to *emerge* during the research process and a subjectivist epistemology that implies an interactive relationship between the researcher and participants.

A rigorous inductive approach seeks to minimise preconceived assumptions, prior knowledge and experience distorting the reality of the data itself by imposing “prior constructs or theories on the informants as some sort of preferred a priori explanation for understanding or explaining their experience” (Gioia, Corley and Hamilton, 2013, p.17). At the same time, a pragmatic approach to a priori knowledge is advantageous. An ethnographer inevitably begins with preconceived notions and “enters the field with an open mind, not an empty head” (Fetterman, 1998, p.1). A priori knowledge, including contextual information, is thus part of the research process, whereby the “ethnographer adopts a cultural lens to

interpret observed behaviour, ensuring that the behaviours are placed in a culturally relevant and meaningful context" (Fetterman, 1998, p.1).

The research study thus takes a pragmatic view by maintaining an open, aware and questioning approach to the research, *despite* knowledge in the field. Indeed, "theory is a guide to practice; no study, ethnographic or otherwise, can be conducted without an underlying theory or model" (Fetterman, 1998, p.5). However, maintaining an open mind is essential to acknowledge unanticipated data and recognise its importance, and to avoid the trap that "advances in knowledge that are too strongly rooted in what we already know delimit what we *can* know" (Gioia, Corley and Hamilton, 2013, p.17, researcher's italics). The inductive research methodology is supported by a triangulated multi-method research design, within the context of an embedded case study. Case study literature supports a pragmatic view to a priori knowledge. External models and frameworks are useful in framing the initial research (Eisenhardt, 1989) and serve a useful function within the search for new meaning (Riege, 2003).

In practice, the inductive research process was highly iterative and immersive. The participants' story emerged through increasing levels of analytical abstraction that involved written transcripts for interviews and participant observation, the coding process (using a computer-aided qualitative data analysis software package, 'Quirkos'), extensive memos (ranging from initial notebook jottings to detailed analytical memos) and thematic analysis. The process of evaluating the participants' story within the broad theoretical context of the literature developed its own iterative dynamic, helping emerging insights to be sense-checked (going back into the detailed participant data) and improving the validity of the findings (section 3.6.2).

3.6 Research methods

An inductive, qualitative, ethnographic approach was adopted using a triangulated multi-method research design, which included both interviews (individual and group) and participant observations. Individual participants were first interviewed in situ and were then given the opportunity to come together in workshop events, providing the embedded case study context. The emphasis on what participants actually *do* in the field of strategic thinking links the research directly to the praxis literature (chapter 2, section 2.5).

3.6.1 Qualitative research method

Qualitative data are a 'source of well-grounded, rich descriptions and explanations of human processes' (Miles, Huberman and Saldana, 2014, p.4) that flow from the inductive research methodology, constructivist ontology and interpretivist epistemology. Embedded within this approach is the assumption that we "perceive nothing except through the knowledge structure in which perception is embedded" (Astley, 1998, p.498). In other words, there is no objective reality to be found that is separate from us. The research study recognises that the researcher and participants are thus connected and that the researcher needs to maintain a self-reflective stance and maintain appropriate boundaries with the research participants.

Within this constructivist paradigm a qualitative approach aims to understand the meaning, the constructed sense of reality, that lies within the underlying participant processes by describing and analysing the world “from the perspective of those involved with its performance” (Rosen, 1991, p.6). The strength of this approach is that it focuses on “*naturally occurring, ordinary events in natural settings*”, and confidence is “*buttressed by local groundedness*” (Miles et al., 2014, p.11, italics in original). By generating rich, deep data on what participants actually do in terms of strategic thinking the research study contributes to the praxis literature, where there is “sparse literature on what organizations *actually do*” (Goldman, Scott and Follman, 2015, p.155, researcher italics).

Good qualitative data can help to move beyond the researcher’s initial conceptions and “are more likely to lead to serendipitous findings and to new integrations” and the development of new conceptual frameworks (Miles, Huberman and Saldana, 2014, p.4). Building a strong participant narrative or analytical story can give the research a quality of “undeniability”, “a concrete, vivid, and meaningful flavour” (Miles et al., 2014, p.4) and “a ring of truth” (Miles et al., 2014, p.11). The path to do so, however, is messy, iterative, complex and time consuming. Not least, it requires considerable persistence and patience.

3.6.2 Ethnography

Ethnography is “a conscious and systematic interpretation of the culture system operating for those the ethnographer observes” (Rosen, 1991. p.1) where culture is the “shared meaning that a group of people create over time” (Mintzberg et al., 1998, p.274). It acknowledges the importance of shared assumptions, beliefs, values and knowledge structures within the organizational culture of the participant organizations. The research study is focused on small and medium-sized environmental organizations, most of which are not-for-profit organizations and exist to support the natural world. This focus on meaning and culture, values, beliefs and assumptions (Rosen 1991) enables an understanding of the complex interactions between these factors and the strategic thinking process to emerge over time by “exploring how the shared meaning system of [*the*] organization is created and recreated” (Rosen, 1991, p.6, researcher italics) in relationship to a connection between the natural world, the strategic thinking process and the broader decision-making process.

An ethnological approach is aligned to holistic disciplines such as strategic thinking and the nature of connectivity with the natural world. Ethnographers “assume a holistic outlook in research to gain a comprehensive and complete picture” to look beyond the immediate context to identify “interrelationships among the various systems and subsystems ... generally through an emphasis on the contextualisation of data” (Fetterman, 1998, pp.18-19). This matches the complex and holistic nature of both a connection to the natural world and the strategic thinking process. Ethnography is a highly iterative process. In most research, data collection precedes analysis but ethnography is inherently iterative, “analysis precedes and is concurrent with data collection.” (Fetterman, 1998, p.2). This movement back and forth within the research process enables meaning to emerge from rich, deep and complex data. A holistic understanding emerges over time as a result of the process.

Ethnography requires an open mindset. This includes recognising data that was unexpected at the beginning of the research study to explore “uncharted ground encountered” (Rosen, 1991, p.7) and “rich, untapped sources of data not mapped out in the research design” allowing “multiple interpretations of reality and alternative interpretations of data” to surface (Fetterman, 1998, pp.1-2). The research process captures an insider perspective, what is truly important to the research participants, which enables a fuller understanding of the relative importance of strategic thinking within participant organizations to emerge, and addresses the underlying question of why this is the case.

3.6.3 Theory building and research questions

In inductive research the emergence of new data (and meaning) can dramatically influence the research process. Eisenhardt (1989, p.536) points out that developing theory within a case study context involves recognising that “no construct is guaranteed a place in the resultant theory, no matter how well it is measured. Also, the research question may shift during the research.” Furthermore, “theory-building research is begun as close as possible to the ideal of no theory under consideration and no hypotheses to test.”

The research aim, rationale, objectives and questions (sections 3.2 to 3.3) were framed to be as open as possible to what actually emerged from the participant data, which forms the foundation of the participants’ analytical story. Although there were important unanticipated insights that arose from the deep, rich data there was no need to amend the research questions during the research process.

3.6.4 The role of ongoing contextual research

The research method included ongoing contextual research to inform but not constrain the meaning emerging from the participant data. This included developments in the specialist literature field and other literature streams, conferences and other events in the research sector, whilst recognizing the primacy of the participant data. This enabled heuristics, “strategies of discovery in interpretative research” (Wagenaar, 2011, p.241) to be incorporated more actively into the research process, for example, understanding the relationships between different components of the data through analogy, which requires reading outside the immediate literary field; “the more you have to draw on, the better” (Abbott, 2004, p.55).

This approach also involved moving into other disciplines and bodies of knowledge to develop the “ability to break out of the standard frames we put around phenomena” (Abbott, 2004, p.54). This helped to keep the researcher more open to the unexpected and thus to ensure that new insights arising from participant data were not missed and that emerging theory remained ‘grounded’ in the actual research data. This was particularly useful in developing the ability to see and then develop a fuller understanding of unanticipated linkages in the participant data.

One of the key advantages of this approach was to maintain an open mind to what the participants were actually saying, to listen more actively to them even when the link between what they were saying and the research questions seemed tenuous and to notice *when* they were most motivated to speak and *what* they chose to speak about. The aim was not to use further knowledge to provide explanations and understanding *per se* but to appreciate more fully how the participants' linked different, and sometimes contradictory, explanations themselves, so that even though "an ethnographer's explanation of the whole system may differ from that of the people in the field ... basic descriptions of events and places ... should sound familiar to native and colleague alike" (Fetterman, 1998, p.11). The aim was to listen more actively (Drucker, 2004) and see a more holistic picture, one which might include elements that were beyond the mindset of the researcher at the beginning of the research process, but were clearly important to the research participants in terms of what they did, said and believed.

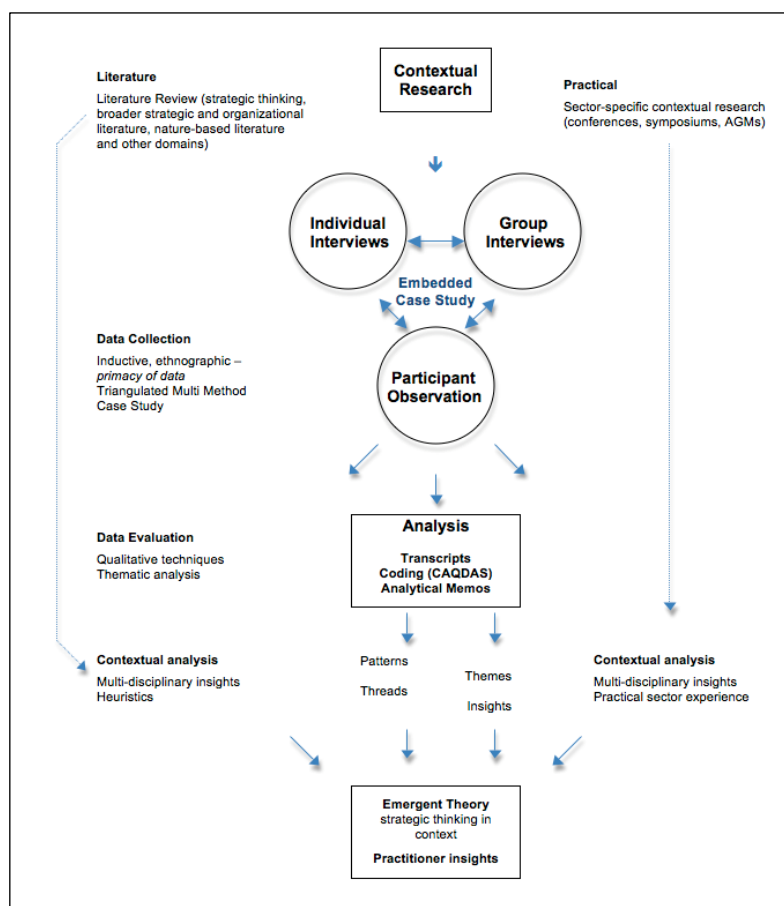
3.7 Research design

The research design takes the form of an embedded case study using a triangulated multi-method approach comprising individual interviews, group interviews and participant observation, supplemented by ongoing contextual research. The ethnographic method is structured to capture deep, rich data by focusing on extracting meaning within the specific research context. The research process involved conducting 38 individual interviews and four workshop events (group interviews and participant observation) for 38 participants from 29 small and medium-sized environmental organizations (Appendix H) over a period of 18 months across the United Kingdom. The research process is illustrated in figure 3 (section 3.7.1 below).

3.7.1 Triangulated multi-method approach

The triangulated multi-method approach enables the researcher to "cross-check, compare and triangulate the [*emerging data*] before it becomes a foundation on which to build a knowledge base" (Fetterman, 1998, p.9, researcher italics). It also allowed anomalies and inconsistencies in the data to be explored further as these often pointed to deeper levels of meaning within the data, connections and relationships that were not initially recognised. This triangulation process increases the validity of the research findings (ensuring results were consistent across the three methods of data collection) subject to the limitations of inductive research within the context of an embedded case study (section 3.7.3).

Figure 3: Research Methodology and Design: Multi-method Approach Using Triangulation



Source: Researcher summary (simplified).

3.7.2 Embedded case study

The research study comprised 38 individual interviews (including five supplementary feedback interviews), four group interviews (conducted within workshop events where six to eight participants came together as a community of shared interests and experience) and participant observation (conducted within the workshops and around the individual interviews). This approach provided a practical setting and context for the embedded case study research (Yin, 2014), yielding deep, rich and multi-layered data grounded in the participants' practical day-to-day work experience.

The distinguishing characteristic of a case study approach is that it focuses on a “contemporary phenomenon in its real-life context, especially when ... the boundaries between phenomenon and context are not clearly evident” (Yin, 1981a, p.59; Yin, 1981b). This is aligned to the research study, which explores *how* and *why* a sense of connection with the natural world contributes to the ability of small and medium-sized environmental organizations to think strategically, a knowledge gap in the current literature. A case study approach to building theory is appropriate in a new topic area (Eisenhardt, 1989, p.532), is commonly used in exploratory research (Yin, 2014) and case studies typically include those on organizational decision-making (Yin, 1981b), a broad category within which strategic thinking sits.

The unit of analysis of the research is at the organizational level (understanding the strategic thinking process within the organizations) but the units of observation include both individuals and groups within the participating organizations; these sub-units comprising the embedded nature of the case study (Yin, 2014).

3.7.3 Validity, reliability and generalisability

There are strengths and weakness in a case study approach. An embedded case study method was selected because of the “likelihood of generating novel theory” (Eisenhardt, 1989, p.546) and its capacity, when combined with an inductive ethnographic approach, to generate rich, thick data, which can offer important insights and allow new meaning to emerge from “multiple interpretations of reality and alternative interpretations of data” (Fetterman, 1998, pp.1-2), thus contributing to the development of novel new theory.

The limitations of case study research are well documented. Research findings are not generalisable and “if findings cannot be generalised beyond the immediate inquiry, they cannot really inform a broader theory” (Bátiz-Lazo, 2016, p.14). Reliability is questioned because of the subjectivity of the research process (Rosen 1991; Riege, 2003) and the difficulty of replicating research studies:

“No matter how we might look at a particular set of data, another analyst, differently situated – in time, education, gender, ethnicity, age, and so on – will likely highlight different patterns of meaning against the same background of raw information. And there is always more that we might do with our own writings. There are more avenues to explore, and the possibility there to travel more fully those already started” (Rosen, 1991, p.21).

Some scholars also question validity (Berg and Lune, 2014) although others believe that emergent theory is testable and is likely to be empirically valid because “the theory-building process is so intimately tied with evidence that it is very likely that the resultant theory will be consistent with empirical observation” and an “intimate interaction with actual evidence produces theory which closely mirrors reality” (Eisenhardt, 1989, p.547).

The limitations above do not negate the potential in case study research to contribute to theory development and provide practical insights to those in the field. The research focus on a “bounded phenomenon embedded in its context” means that the “possibility for understanding latent, underlying or nonobvious issues is strong” (Miles et al., 2014, p.11) when the focus of the research study is complex. The power of an inductive, qualitative methodology is contained within the rich contextual data that is generated, allowing new theory to be developed that is genuinely novel and insightful, which can then be built upon by other researchers outside the focused context chosen for the original research.

The triangulated multi-method research design strengthens the validity of the research study through consistent cross checking of data and emerging theory. A rigorous ‘audit trail’ was maintained by documenting each stage of the research process, increasing transparency, thus mitigating, if not eliminating, some of the concerns on research reliability.

3.7.4 Potential researcher bias

In an inductive research process the world is understood from a subjective rather than an objective perspective. It recognises that the researcher and the research participants are in relationship. At the same time, it is important to keep appropriate boundaries and a level of professional detachment, which requires self-awareness (reflection and self-observation) to maintain, as far as possible, the stance of an external researcher. The potential for researcher bias is always present in qualitative research. The researcher cannot be completely neutral or fully objective and some “contamination” is always present (Fetterman, 1998, p.41).

The researcher undertook certain practices to maintain awareness of this contamination and to make changes where appropriate. Reflective memo writing and jottings help as does the practice of leaving space within the research process, not always easy, but vital. Coffee shops are a useful place to take some downtime between interviews and reflect upon how they went. Taking time out to walk or be in the natural world also helps. Carrying a memo book is especially helpful because it's surprising how useful thoughts and connections can vaporise once back in the research process.

A reflexive approach during the research process is critical, recognising where an area of belief or values congruity might lead to bias and then building in space to check in to the process dynamics (what was actually going on) and make any adjustments that are necessary. These check-ins were very useful to the researcher in a number of ways, not least to remain focused on the task and data centric (listening, hearing, providing space for, and registering what was *actually* said by the research participants). This was also key to continuously improving practical interview skills (for example, noticing where the researcher had interrupted a participant, filled a natural period of silence, failed to notice something of significance or too readily jumped in with an observation).

3.8 Research focus: Small and medium-sized environmental organizations

The initial rationale of the research study is that there is a value in our connection to the natural world that contributes to an ability to see a more holistic picture within the context of the strategic thinking process. Small and medium-sized environmental organizations provide an ideal context to enter into this connected world. They have a strong sense of purpose (relating the natural world) that influences their long term strategic direction, which they translate into short term objectives that are managed within the resources available to them. The three research questions incorporate these dimensions of the strategic process and explore how a connection to nature impacts upon the strategic thinking process within participant organizations (section 3.3).

3.8.1 Contextual review of the environmental sector

The review of the environmental sector provides useful contextual information to understand and interpret the nature of the qualitative data more fully by sensitising the researcher to it (Karami, ed., 2011). The ability to define and categorize environmental organizations proved to be challenging as the sector is

under-researched (Clifford et al., 2013). The key components of the review were:

1. The definition, classification and organizational structures of environmental organizations (section 3.8.2).
2. The approximate size of the environmental sector and the distribution characteristics in terms of numbers and income, including perceptions in the sector (section 3.8.3).
3. The extent of membership and volunteering in the environmental sector (section 3.8.4).

The key points of the environmental sector review are summarised below (sections 3.8.2 to 3.8.4). Due to the paucity of research in the area all data should be regarded as indicative only.

3.8.2 Definition, classification and form of environmental organizations

Environmental organizations are grouped together by purpose and activity and definitions share common characteristics. Environmental organizations are those “promoting and providing services in environmental conservation, pollution control and prevention, environmental education and health and animal protection” (Clifford et al., 2013, p.244) and include “animal protection and welfare, natural resources conservation, wildlife preservation and protection” (National Council for Voluntary Organizations, ‘NCVO’, 2016). Environmental activities are diverse but include botanical and zoological gardens, nature reserves, nature conservation and preservation activities, membership organizations and ecological movements.

Environmental organizations adopt a range of organizational structures that include charities and voluntary organizations, community groups, social enterprises, cooperatives and mutuals (University of Birmingham, Third Sector Research Centre, November 2016). There is a range of organizational forms from not-for-profit (social and charitable purpose) to commercial organizations and an alignment between a strong social concern and a not-for-profit structural form (Alter, 2007; Allinson, Braidford, Houston, Robinson and Stone, 2011; Department for Business Innovation & Skills, 2011a).

In the context of the third sector, environmental organizations are restricted for classification purposes to not-for-profit concerns where surplus revenues are used to achieve the core purpose or mission of the organization. In practice, most environmental organizations are charities (which assists funding as the organizations grow in size) or social and community enterprises. However, the sector is complex and includes sole traders, hybrid organizations with a social purpose component (often a separate charity or social enterprise) and other proprietary forms such as farms and landed estates with a strong environmental focus.

In the United Kingdom a charity is defined as an organization with a specific purpose that is for public benefit and defined in law as a charity (NCVO, 2019) and a social enterprise is defined as a business with primarily social objectives whose surpluses are principally reinvested for that purpose (Department

for Business Innovation & Skills, 2011b, p.2). The Department of Trade and Industry (2002) clarifies a social remit as a “business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners” (Department of Trade and Industry, 2002, p.6).

A simple working definition of an environmental organization incorporates the main elements of the review above. It is one whose:

‘Purpose serves a social objective to protect, conserve or safeguard the natural world, including landscape, flora and fauna, and reinvests its profits accordingly’.

3.8.3 Sector size and distribution

The total income for environmental organizations in the United Kingdom in 2016/17 was approximately £3.4 billion for some 6,000 organizations, an average income of just over £565,000, considerably higher than the average for all voluntary organizations (NCVO, UK Civil Society Almanac, 2019, data up to 2016/17). This is indicative only as data on environmental organizations is limited. NCVO classifies the size of environmental organizations by annual income as follows: micro and small organizations, income up to £100,000; medium organizations, £100,000 to £1 million and large organizations (including ‘majors’ and ‘supermajors’) over £1 million. This is considerably below the standard definition of SMEs in the United Kingdom as organizations with an income under £25 million (or the EU definition of £50 million) and/or employees under 250 (Department for Business Innovation & Skills, 2012; The Company Warehouse, 2018; Rhodes, 2019).

The size definitions for classification above were sense-checked with environmental organizations in the field at conferences, events and symposiums. This suggested a sector working definition of annual income of approximately £20 million as the practical threshold for defining a large organization in the sector, higher than the classification criteria above but well within the standard SME definition in the United Kingdom.

The environmental sector is heavily bifurcated. The number of small and medium-sized environmental organizations comprised 93% of total environmental organizations; larger organizations, 7%. Income distribution is likely to be broadly comparable to the voluntary sector as a whole where large organizations comprised 4% of the total number but accounted for some 82% of the sector’s total income. Conversely, small and medium-sized organizations, which comprised 96% in number accounted for some 18% of income (NCVO, UK Civil Society Almanac, 2019, data up to 2016/17). There has been a continued increase in organizations with income over £100 million, prompting the NCVO to add a new category, ‘super-major’, in 2016. The environmental sector has grown rapidly since 2008 and commercial organizations have also taken on a more proactive social role through corporate social responsibility (chapter 2, section 2.9.3).

3.8.4 Membership and volunteering

There has been a significant growth in the membership of environmental organizations and those who volunteer for them. Figure 4 below provides membership and volunteering data for a selection of the larger organizations in the sector. This provides an indication of the size and importance of membership and volunteering to the sector. Although the data is piecemeal, and thus indicative only, it demonstrates the scale of the support that environmental organizations attract.

Figure 4: Membership and Volunteering Data for Selected Environmental Organizations

Organization	Members (million)	Volunteers (numbers)	Volunteer Hours [Approximate Value, £]
National Trust	5.6	65,000	4.8 million
Royal Society for the Protection of Birds	1.2	12,000	1 million +
Wildlife Trusts	0.85	35,000	1.7 million
Woodland Trust	0.5	3,224	174,000 [£1.7m]
Wildfowl and Wetland Trust	0.2	1,000	198,000

Sources: Organizational web sites (annual reports, impact reports, volunteering pages etc.) over the period 2016-2019.

Note: The value of volunteer hours is approximately £10 per hour (roughly equivalent to the minimum wage).

The National Trust has grown its membership base from 3.5 million in 2007 to over 5.6 million in October 2019. Similarly, RSPB membership increased by some 100,000 from nearly 1.1 million in 2010 to nearly 1.2 million in 2018. Volunteer numbers have also grown rapidly over the last twenty years, with National Trust attracting some 65,000 volunteers in October 2019 (equivalent to 4.8 million hours of volunteering) and RSPB some 12,000 volunteers (equivalent to over a million hours of volunteering). Members provide stable long term funding and volunteers provide resources at reduced, and sometimes minimal, cost (there is always a cost attached to managing and supporting people no matter how 'free' their services). Informal feedback from sector events indicated that small and medium-sized environmental organizations also greatly benefitted from members and volunteers.

3.9 Participant sample size, composition and recruitment

The research process comprised 42 interviews (38 individual and 4 group) and four workshop events for 38 participants from 29 small and medium-size environmental organizations. The initial objective was to conduct a *minimum* of 30 individual interviews (Mason, 2010; Saunders and Townsend, 2016) combined with four group interviews and participant observation at workshop events, extending the interview process until a point of data saturation was reached (Glaser and Strauss, 1967).

As participants were drawn from small and medium-sized environmental organizations it was initially envisaged that the level of homogeneity within the research group would be relatively high, reducing the number of interviews necessary (Saunders and Townsend, 2016). In addition, the multi-method approach adopted for the research study was helpful in comparing and cross-checking insights, themes and patterns, which emerged from the different research methods, reinforcing the process of interpreting the data. In fact, saturation, the point where "the collection of new data does not shed any further light on the

issue under investigation” (Mason, 2010, p.2) occurred deep in the interactive process of data collection and analysis after the final group interview. At this point 37 interviews had been conducted and an extensive body of data had also been collected through the process of participant observation.

Interviews were finalized after 42 interviews had been conducted. The increased number reflected the complexity of the research study and a greater degree of heterogeneity within the participant group than was originally expected, most significantly in terms of size (smaller organizations had much more informal strategic processes). Nevertheless, there was a strong degree of commonality between the participants in terms of the key themes in the emerging analytical story.

Participants were recruited through a variety of techniques, the principal one being through nature festivals, events, academic and sector symposiums and conferences, Annual General Meetings and other gatherings within the environmental sector. Participants were recruited across the United Kingdom, one at a time, initially through personal contact and followed up by email. Individual interviews were conducted in situ, followed up by the group workshop events, which were conducted regionally (Wales, Scotland and England).

3.9.1 Participant group

The 38 participants, from 29 organizations, were drawn from small and medium-sized environmental organizations in Wales, Scotland and England, reflecting a broad range of organizational objectives including conservation and protection of the natural world, campaigning and advocacy, animal and people welfare (enhancing the lives of people through a connection with the natural world), in line with the definition of an environmental organization in section 3.8.2 (overall summary in Appendix H).

Participants were selected to represent a diversity of organizations in terms of purpose (landscape, flora, fauna, welfare and campaigning), structure (primarily charities and social and community enterprises [25 organizations] but also a small number [4] of hybrid, land management and other organizations), geographic location (Wales, Scotland and England) and a broad representation of age and gender within the group. The size of the organizations ranged from an annual income of under £10,000 to £4.3 million. The research study used a higher income boundary to define small and medium-sized environmental organizations than the NCVO (£5 million rather than £1 million; section 3.8.3), which is within both the standard UK SME definitions and the informal environmental sector definition. Employees of all participant organizations (full time equivalent) were below 250, in line with the standard UK SME definition (section 3.8.3). More detailed analysis of the participant group is included in Appendix H.

The selection criteria included the participants having a role that involved strategic decision-making in some capacity but this was interpreted broadly, in terms of *influence*, to include Founders, Chief Executives, Board members, Departmental Heads, Owner/proprietors and Supervisory or project-based positions with a degree of autonomy and responsibility. This contributed to a full representation of participants from all levels of the participating organizations and captured those in informal as well as formal leadership positions (Gardner and Laskin, 2011), although the majority (24 organizations) were in

positions of formal power and authority. In the majority of cases participant organizations fielded one participant (25 organizations) with a small number (4 organizations) contributing between two and six participants. The contribution of those organizations who fielded multiple participants yielded unexpected benefits, for example, several organizations were in the process of significant strategic changes and participants from the same organization often offered up very different perspectives.

Although the researcher considered participant selection carefully there was also a degree of fortuitous circumstance, not least the way in which many participants so enthusiastically embraced the research topic. As Fetterman observed, “the reality, however, is that ethnographic work is not always orderly. It involves serendipity, creativity, being in the right place at the right or wrong time, a lot of hard work, and old-fashioned luck” (Fetterman, 1998, p.2). Interesting all the participants fully embraced the research in their own ways and each offered invaluable insights into the research.

3.9.2 Ethics

Given the personal, and sometimes sensitive, nature of the participant data as well as the often direct link to the strategic process within the organizations, data remains confidential unless the participant agreed otherwise. As the research group is part of a relatively small sector the level of connection between organizations is relatively high. As a result, all quotes have been anonymised to avoid identification and specific identifying features have been generalised or removed where appropriate. In accordance with standard ethical procedures all potential participants were sent an invitation form to participate in the research study, an informational sheet on the research and consent forms for participation and for recording the interviews (Appendix I). This included five participants who attended the workshop events but not were not available for individual interviews.

3.10 Data collection: Methods, tools and techniques

The research study took place over 18 months with individual interviews followed by four group workshop events (including group interviews and participant observation) and five feedback interviews on the preliminary findings of the research, providing a longitudinal dimension to the research; “by definition, ethnography is a longitudinal method, geared toward a process-based understanding of organizational life” (Rosen, 1989, p.21).

The workshop events (attended by six to eight participants each) provided a focal point where participants came together as part of the embedded case study. The role of the researcher was facilitative and the quality of the participant discussions, both informally during the morning (captured through participant observation) and then as part of a recorded group discussion in the afternoon, was subtly different from the individual interviews. When the recording device was off participants often opened up more and were, perhaps, more willing to express their true feelings and opinions. This included expressing their views on the limitations of strategy, occasionally in very direct language. This added an important dimension to the research data collected, the object of which is to capture rich, deep, qualitative data that is capable of eliciting meaning in relation to the research objectives. It also helped to

highlight aspects of the organizational culture that were unacknowledged elsewhere (the shadow side; Egan, 2012) but were, nevertheless, important in terms of the research questions.

3.10.1 Overview

The aim of data collection is more than a set of mechanisms to gather data. Ethnography is a “method of ‘seeing’ the components of social structure and the processes through which they interact” (Rosen, 1991, p.13). As the focus of the research study is complex and the three research questions (section 3.3) are interconnected and holistic, the design of data collection methods was kept relatively open to allow the participant data to speak for itself. This recognises that fieldwork lies at the heart of ethnographic research design (Fetterman, 1998) and also acknowledges the limitations of the a priori knowledge and experience that the researcher brings to the field because we are not aware of our own constraints until we discover it later through self-observation (Rosen, 2000). In short, we don’t know what we don’t know.

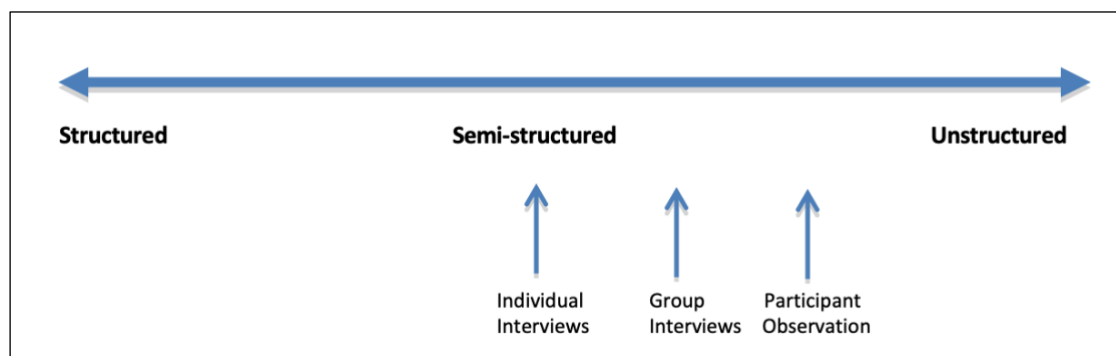
The three data collection methods were kept as open as possible (semi-structured to relatively unstructured, figure 5 below) to elicit the unexpected and to help focus the research on the centrality of the participant data in allowing meaning to emerge. For this reason the use of strategic terminology was minimized in the interview templates (Appendices B and C); “if we had designed our interview protocol around existing theory and terminology, we would have missed a key aspect of their sensemaking by imposing our preordained understandings on their experience” (Gioia, Corley and Hamilton, 2013).

3.10.2 Structure underlying data collection methods

One of the strengths of a multi-method research design is that it can accommodate different degrees of structure for each research method. Individual and group interviews were both semi-structured. The individual interviews were most tightly structured with six open questions that prompted discussion around the topic and reflected the research objectives with potential additional questions for each topic that were designed to clarify, deepen or probe the interviewee’s response if appropriate (interview template, Appendix A).

Group interviews were also structured as a set of broad open questions, designed to elicit discussion within the group (interview template, Appendix B). However, these questions were prompts to engage the participants rather than seek a direct response to each question. The objective was to allow participants to discuss issues that interested them with minimal intervention from the researcher, whose role was facilitative. Participant observation took place pre and post interviews and in the workshop events, where the researcher observed how participants chose to participate and the content of that participation. The different degrees of structure complemented each other; the data that emerged was subtly different in each case but nevertheless consistent (figure 5):

Figure 5: Triangulated Research Design - Degree of Structure



Source: Researcher illustration

The use of some structure in prior instrumentation is aligned to the complex nature of the research study and the multi-method embedded case study setting (Miles, Huberman and Saldana, 2014). However, allowing “the detailed structure to be worked out during the interview” (Drever, 1995, p.1) supported the core inductive methodology of the research. Providing participants with the space in the interviews and workshops to talk about what was truly important and significant for them and limiting researcher interventions wherever possible (subject to broadly covering the key areas of the research) allowed unanticipated insights to emerge and increased the richness and depth of the data.

3.10.3 Individual interviews

38 individual interviews were conducted and recorded in situ within the organizations of the participants (or a local place of choice), with one exception when Skype was used. They took place over an 18-month period from April 2017 to September 2018 and were supplemented with five feedback interviews on the preliminary findings of the research conducted between April and July 2019. Interviews lasted approximately one hour (60 minutes including some 10 minutes for the introduction and wrap up). Individual interviews were conducted prior to the workshop events and group interviews in each region. All interviews were recorded. A copy of the individual interview template is included in Appendix A.

The interview commenced with an icebreaker, ‘Describe yourself in three words’, which was a valuable contribution to understanding more fully the motivations and values of the participants. The six open questions that followed were used to elicit ideas and opinions from the participant, to capture the insider perspective, rather than “leading the interviewee toward preconceived choices” (Zorn, 2008, p.1). Zorn sites two underlying principles of the semi-structured interview approach as striving to “avoid leading the interview or imposing meanings” and creating a “relaxed, comfortable conversation” (Zorn, 2008, p.1). Both practices were adopted allowing meaning to emerge naturally.

The key questions asked at the individual interviews included what it means to be connected with the natural world, the nature of the decision-making process within the participant organization and what links there may be between the two, as well as broader questions on the organization’s story and personal motivation to participate in the research. To ensure that participants could introduce other matters of

importance to them the final question was “Is there anything else that is important to you, which we have not discussed as yet?”, a question that generated a very rich seam of data.

The objective was to avoid leading participants into subjects that they may not attribute importance to. In other words, to see what they *actually* did, even if it was outside the researcher’s knowledge and expectations. As Wagenaar observes, “you can’t ask for what you don’t know” (Wagenaar, 2011, p.251). In order to understand fully the relative importance of strategic thinking within participant organizations, the researcher was required to step back and accept that it may or may not play a central role in the working lives of the participants or their organizations and seek an understanding of why this might be the case. The rich data that emerged played a critical role in linking the dots in the meaning that emerged from the data, often in areas outside the preconceived assumptions and knowledge of the researcher.

A number of other interview practices helped to increase the richness and depth of the interviews. In qualitative research, “issues of instrument validity and reliability ride largely on the skills of the researcher” (Miles et al., 2014, p.42). In practice, this is a complex area in which the researcher gains skills over time. It includes the use of open rather than closed questions, the ability to tolerate periods of natural silence without interruption, providing some structure (for example, giving participants an indication of time remaining), observing ethical standards and not only treating participants with respect but acknowledging with gratitude the generous gift of their time. The result of all these little things is a growing trust between interviewer and interviewee that yields rich rewards in terms of data. At the same time, it is important to keep appropriate boundaries and a level of professional detachment; to maintain, as far as possible, the stance of an external researcher.

Other techniques were used to encourage participants to open up, including follow up questions designed to elicit further discussion or unpack specific responses to gain a deeper, more practical or tangible understanding (Gubrium and Holstein, 2001). This helped to bring to the surface matters which the participants felt very strongly about, sometimes important events in their lives and careers, which were imbued with meaning (Bennis and Thomas, 2002). These were most often related to the broader story of their connection with the natural world, giving them a voice in matters that were deeply significant to them. The use of strategic terminology was minimised, wherever possible, and replaced by more general terms to avoid leading or unduly influencing the participants’ responses. The ‘Five Whys’ technique was also used to encourage participants to dig deeper into their responses (asking ‘why?’ or ‘what does that mean?’ a number of times to get to a deeper, foundational level behind the initial response). This technique allowed richer, deeper data to emerge without any direct input of the researcher.

An important element in the interview process was to recognise serendipity when it arose. Wagenaar talks of the need to “create the conditions for surprise” in qualitative interviews (Wagenaar, 2011, p.251). The researcher observed that when the unexpected happened, or an interruption of some kind occurred, it acted as a reset and the dialogue often commenced from a different, sometimes deeper place. Likewise, Fetterman’s observation that “the most important element of fieldwork is being there – to observe, to ask seemingly stupid but insightful questions, and to write down what is seen and heard”

(Fetterman, 1998, p.9) is deeply insightful. The best questions are often the simplest and the response to such simple questions was often very rich indeed.

Five feedback interviews on the preliminary findings of the research were conducted at the end of the research process between April and July 2019. These were informal and included participants from each of the regions; Wales, Scotland and England. These were conducted in situ and lasted approximately one hour. The researcher took the participants through the broad preliminary findings and asked for feedback, including whether participants thought something important was missing. The data was coded separately (Appendix C) as it emanated from selected follow up interviews rather than the interview process as a whole. The feedback proved useful and provided a further cross check during the data analysis process (section 4.4).

3.10.4 Group interviews

Group interviews were part of the regional workshop events (section 3.10.5) and attended by six to eight participants. They were recorded and lasted for approximately 90 minutes. They were structured as a set of broad open questions, designed to elicit discussion within the group and to engage the participants rather than seek a direct response to each question. Participants quickly engaged with the process, opened up, were able to talk about the key challenges and issues they faced and express their thoughts, feelings and observations freely. The role of the researcher was purely facilitative. The regional group interviews were supplemented by a fourth group interview for the multiple participants from one participant organization.

The interview commenced with an icebreaker followed by broad, open questions that included how participants might describe themselves to those outside the sector, what they felt they have in common, what constitutes success within the organizations, what they felt was most significant in the morning workshop discussions and the personal and organizational impact of a connection to nature within their organizations. The final question was again, 'Is there anything else that is important to you, which we have not discussed as yet?' A copy of the group interview template is included in Appendix B.

The group interviews resulted in a different dynamic to the individual interviews and participants engaged collectively as well as individually, which often extended and deepened the level of response. The interviews took place in the early afternoon after the participants had engaged with the morning workshop discussions. Participants both reflected on the earlier discussions and responded to the broad, open questions that loosely structured the interview. The data that emerged from each workshop was subtly different, linked to the personalities, group dynamics, personal and organizational issues and concerns of those attending. In one of the workshops a number of participants were close to tears, gallows humour lightened the intense discussion and the participants spoke passionately and intensely about what they did, why they did it and what they feared the future may bring. This perspective reflected similar concerns expressed in individual interviews but would not have emerged with such intensity from those alone.

Fetterman talks of informal interviews in terms of being “casual conversations” that are useful in “establishing and maintaining a healthy rapport” and open up the “categories of meaning in a culture”, allowing the researcher to “identify shared values in the community – values that inform behaviour” (Fetterman, 1998, p.41). This is a good description of the nature of the group interviews and the informal discussions in the morning beforehand. The participants quickly engaged and ran with the process, discussions often went deep and new questions and topics arose naturally out of the conversation. The data that emerged was very insightful, often unanticipated and particularly useful in collective areas such as culture, shared values and belief systems. This helped the researcher “classify and organize an individual's [*or groups*] perception of reality” (Fetterman, 1998, p.41, researcher insert in italics).

As the group interviews in each region followed the individual interviews, morning workshop events and the initial introduction (which included a summary of the research process), participants were well aware of the focus of the research on strategic thinking in small and medium-sized organizations. As the group interviews were open and relatively loosely structured, participants were able to focus on what was most significant to them. The way in which they did, or did not, integrate strategic thinking into these discussions was an important part of the research process.

Although the role of the researcher was facilitative and interventions were minimized (the most common reason being to keep to time commitments) “some degree of contamination is always present” from the researcher (Fetterman, 1998, p.41). In this case, the researcher ensured that there was at least one open question in relation to the broad decision-making processes within the participant organizations and was vigilant in maintaining time boundaries, which were always explicit (as this was a substantial time commitment for many of the participants). Different groups reacted differently, in two groups the strategic process was extensively discussed, in the others it was integrated into more general discussions.

3.10.5 Workshop events and participant observation

Regional workshops took place in Wales, Scotland and England and ran for some six to seven hours. The supplementary workshop for the multiple participants from one participating organization was held in situ at the organization's offices and was shorter (a half-day). The workshop discussions were informal and provided an opportunity for participants to get to know each other, to exchange their organizational and personal stories and discuss key issues and challenges (the agenda for the Welsh workshop is included in Appendix D). Workshop sessions and discussions (taking place in the morning) were the basis of participant observation, recorded as manuscript notes and then as memos. Recorded group interviews took place the afternoon. Chatham House rules applied; information disclosed during the meeting may be reported by those present but the source of that information may not be identified unless otherwise agreed.

Participants engaged strongly in the workshop events. Discussions were characterised by high levels of engagement and considerable passion and energy, a rich context for participant observation. Participants discussed a wide range of issues and challenges including personal values and identity, cultural affinity and personal and collective fears. The researcher was able to observe not only what was being said but

the emotional tenor of the discussions, the body language of participants and the subtlety of expression that is easily missed in an individual interview when the researcher is also managing the interview process. This points to one of the key strengths of the multi-method design, which includes the complementarity of data as well as the cross-checks contained within the triangulation of the data. Data that emerged from different methods was different but consistent.

Whilst the interaction often seemed to be in the form of a casual conversation the discussions quickly took on a *collective* depth that was not always present in the individual interviews. In this sense, Fetterman's description of ethnographic research as (relatively) unplanned, sometimes chaotic but always intriguing, is very appropriate to the workshop events (Fetterman, 1998). As the research process was inductive, and data collection and analysis were simultaneous and iterative, the workshop events played a key role in the emergence of overall patterns and threads from the large amounts of data collected and a critical part in making sense of what it all meant, including recognising diminishing returns in terms of new data and the point of data saturation (section 3.9).

Participant observation was a key data collection method. 'Ethnography is known as the method of "participant observation" (Rosen, 1991). In addition to the workshop events, there were other opportunities for participant observation, for example, pre and post interviews. On some occasions the very act of turning off the recording device initiated a deeper conversation, which the participant was happy to include with the interview data. In some cases, once the formal interview was finished (the recording device turned off) participants would continue to talk and share aspects of their lives and work that were important to them. Observations were recorded in hand-written jottings, using bound memo books, which were later transcribed as part of the coding process.

The researcher took care to observe confidentiality boundaries, whether explicit (a participant asked for the information not to be recorded in any form) or implicit (personal remarks that would not be appropriate to use in the public domain unless the participant agreed in advance).

3.10.6 Narrative and storytelling

Giving participants an opportunity to tell their story was an important element of the workshop events. Narrative techniques (a way of discovering a deeper level of meaning through accessing the underlying story or narrative) place particular emphasis on story as "one if not the fundamental unit that accounts for human experience" (Pinnegar and Daynes, 2006, p.4). In this research study, narrative and story were used in a narrower, practical context "to interpret the stories told by individuals, which focuses on the patterns people find in their lives over time" (Karami, ed., 2011, p.397) as part of the multi-method design of the inductive research approach alongside other qualitative techniques within an overall search for meaning.

3.11 Data analysis: Tools and techniques

Data analysis comprised four key stages; transcription of data collected through multiple methods (section 3.11.1), coding and textual analysis resulting in the emergence of key themes, patterns and insights (section 3.11.2), analytical memo writing resulting in an over-arching narrative of the participant data, the participants' analytical story (section 3.11.3) and an ongoing review of the participants' emerging story within the theoretical context of the extant body of the literature to understand where new theory sits within the existing field of knowledge (section 3.11.4). The research study used both manual and computer-aided research techniques and tools in order to elicit meaning from the rich and deep data, supplemented by narrative and storytelling elements within the research methods.

The process of qualitative analysis can be messy and iterative, partly because data collection and analysis overlap (Eisenhardt, 1989); "interviewing and data analysis go hand in hand" (Wagenaar, 2011, p.251). Whilst this allows data collection methods to evolve to reflect emerging insights, themes, patterns and research experience, it also requires consistent research protocols in terms of documentation, recording, traceability, transparency, confidentiality, completeness, regular data backups, safe storage of data and so on. Given that data generated was voluminous and took a number of forms (the multi-method approach) this was essential to avoid the researcher being swamped by the sheer quantity (and sometimes diversity) of the data being generated.

The multiple research methods, supplementary contextual research and the initial a priori frameworks (including the literature review) leads to a pragmatic approach to analysing data, recognising the primacy of participant data in the inductive research approach and the necessity of viewing this within the broad contextual and theoretical framework of the literature to understand more fully where new empirical data stands within the field of knowledge. There is a continuous tension between what the researcher knows beforehand (or thinks they do) and what actually emerges from the data, either because it is unknown or because the significance of the underlying relationships between elements of the research study is not fully recognised:

"The lesson is that the theories we bring to an interpretative/qualitative study are always inadequate to the data. That is, the rich, thick descriptions that we obtain through interviewing and extended observation are infinitely more varied and differentiated than any theory we may hold about them. They may add detail to what we already know, they may challenge what we believe, or they may open up a whole new field of inquiry that we were until then unaware of. But the bottom line is that data always suggest new conceptual insights that we hadn't considered before. Insights, we should add, that often have a peculiar 'persuasive' quality to them (once you see it couldn't have been otherwise), even if they go against once deeply held assumptions" (Wagenaar, 2011, p.266).

In practice, the three research methods gathered data not only on the relationship between the strategic thinking process and a connection with nature but also the participants' experience, life journey, motivation and sense of purpose, and the strategic decision-making process in both a theoretical and a *practical* context. The multi-method approach enabled new insights, patterns and themes to emerge through a variety of instruments using different degrees of structure, thus eliciting a range of different information that enhances, clarifies and complements each other. The triangulation between research elements allows the emerging patterns, insights and threads to be crosschecked for consistency and then evaluated in relation to the broader analytical and theoretical context.

3.11.1 Transcription, jottings and early memos

Interviews and participant observation data were transcribed. Hand-written memos and jottings (within memo books) were summarised in the form of informal memos and incorporated into the memo writing process, which culminated in detailed formal analytical memos. The researcher transcribed all data personally, without the use of voice recognition software, to become as familiar as possible with the content, a critical decision in the research process. The data collection, transcription and coding processes were iterative and each informed the research process as a whole. Even after the coding process was complete the transcripts played a critical role in providing valuable context to participant responses and were useful for cross-checking and comparison purposes when insights arose from the coding and memo-writing processes.

Intimate knowledge of the interview and participant observation transcripts combined with consistent memo-writing throughout the research process (including memo notes after interviews) provided a group of largely descriptive words that formed the basis of some 50 standalone pre-codes that were used to commence the coding process. In practice, these codes quickly changed, were grouped (and regrouped), modified and sometimes deleted as the coding process built a better understanding of the overall picture of what the data was saying; how all the elements related to each other.

There are pros and cons of using pre-codes in inductive research. There is a danger that any preconceived (or theory-based) pre-coding system may influence the ability of the researcher to see what the data is actually saying. As Wagenaar (2011) states, “the ‘key moment’, the ‘hot core’ as it were of qualitative/interpretative research [*is when*] we have to confront our initial ideas with the empirical world ... we constantly adjust our understanding to the particulars of the empirical data” (Wagenaar, 2011, p.259, researcher’s italics). Recognising the importance of allowing the data to speak for itself, the researcher used descriptive words for pre-codes to keep the process as open as possible. The biggest advantage of this approach was that it provided a place to *start* the coding process. With very voluminous data being generated across multiple methods this provided a momentum when there was a danger of being overwhelmed with data.

These pre-codes were not intended to be definitive in any way and they did indeed develop and change significantly during the research process. But they were important in terms of setting up a “dialogue between theory and the world”, which as Wagenaar points out, is “the single most powerful heuristic in interpretative research” (Wagenaar, 2011, p.259). And, in a way that the researcher did not appreciate at first, the hours, days, weeks and finally months, which were spent on transcribing source data initiated a deep dialogue between the data and the researcher, which played a fundamental interpretive role in the research process. Thus transcription was not a task. It was an initiation.

3.11.2 Coding and thematic analysis

Transcribed data was coded and analysed using a textual approach, accompanied by a process of memo-writing, where emerging insights, or clusters of data, were explored and analysed. This process began as informal jottings and notes and became more formal and analytical as data analysis progressed, resulting in the emergence of key patterns, insights and finally themes. The coding process used a computer-aided qualitative data analysis software package ('CAQDAS'), 'Quirkos', to aid the management of large amounts of data and add transparency to the data analysis. Coding was analysed using a thematic approach focused on discovering patterns and meaning, which were explored through analytical memos and then applied to the core research questions and evaluated within the theoretical context of the broad body of literature.

The rigorous transcription process provided a group of largely descriptive words that formed the basis of some 50 standalone pre-codes that were used to commence the coding process. Most importantly, although there are pros and cons with using pre-codes (section 3.11.1) this provided a way to start the coding process despite the voluminous quantities of data to be coded.

Thematic analysis systematically identifies, organizes, and offers insight into patterns of meaning (themes) to "see and make sense of collective or shared meanings and experiences" (Braun and Clarke, 2012, p.57). The search for meaning is central in ethnographic research and qualitative case studies where data should "reflect 'meaningful events' (Yin, 1981a, p.61), thus aligning the inductive methodology and embedded case study method. Both are immersive as themes are patterns of both explicit and implicit content (Joffe, 2012). This requires both analytical depth and interpretation because manifest (explicit) themes often point to a more latent level of meaning (Joffe, 2012) that is not immediately apparent (literally meaning hidden or concealed). Thus, the researcher is required to dig for meaning. The process is complex, iterative and time consuming.

Thematic analysis is a flexible method, which elucidates (literally meaning shines a light on) the underpinning conceptualisation of a phenomenon within a group (Joffe, 2012), suits verbal interviews and can handle larger sets of data (Clarke and Braun, 2017). It is aligned with the nature of the research study, identifying patterns "within and across data in relation to participants' lived experience, views and perspectives, and behavior and practices; 'experiential' research which seeks to understand what participants' think, feel, and do" (Clarke and Braun, 2017, p.297, *italics in original*), providing both depth of analysis and enhanced validity since it is "among the most systematic and transparent forms of such work, partly because it holds the prevalence of themes to be so important, without sacrificing depth of analysis" (Joffe 2012, p.210).

In the first stage of coding (level 1) data was colour coded, grouped (and regrouped) around clusters of meaning until broad themes emerged, which were then explored in analytical memos. In the second stage (level 2) data was analysed as a whole, producing a thematic map (Braun and Clarke, 2006) and aligned with the research questions, acknowledging significant degrees of overlap, which reflected the complex and holistic nature of the underlying data. During this stage five further interviews were held with selected research participants in order to capture their feedback on the preliminary understanding of the research data. These were coded separately (they represented a sample of the participants only) and

integrated into the ongoing data analysis process. Both levels of the thematic process (individual themes and the holistic map) are reflected in the data analysis and discussion (chapter 4) and each level contributes to theory development.

The Quirkos CAQDAS package is flexible, intuitive and easy to use, provides a rich graphical interface and copes well with more complex thematic data. Themes and nodes are represented as circles ('quirks'), which are colour coded so themes (and closely related themes) can easily be seen, tracked and grouped visually. Working with the data interface is intuitive and easy. Although it offers less features and flexibility than some other CAQDAS packages (for example, NVivo) it suited this research study, which is qualitative and strongly focused on textual data. The visual impact of the colour coding of the themes was very useful for raising the level of abstraction (from descriptive to analytical) both aiding the process and transparency of data analysis.

There was also an intensely practical element to the coding process. It was, in itself, a learning process. The wisdom of the advice of Yin (1981a) to be aware of constructing "categories too small and too numerous" ... [*or the*] assumption that "anything might be relevant, so one ought to observe and code everything" (Yin, 1981, p.60, italics by the researcher) is something that is learned primarily by doing. Yet, it is in working with data at this level, making continuous changes along the way, which is such an essential part of the process of discovering the essence of what the data means. A selection of screenshots illustrates the emergence of themes during the coding process and the more holistic representation of the data over time, which was critical in enabling meaning to emerge from the data (Appendix E, section 1.1).

3.11.3 Analytical memos and participants' analytical story

The process of writing memos developed from early jottings and manuscript field memos to detailed analytical memos on the nine major themes underlying the participant data, each of which told its own story. The thematic map linked these individual stories into an overarching narrative, the participants' analytical story, which reflected a deeper sense of connection between the research findings in the context of research as a whole. This overarching narrative represented the deep level of interconnectivity between the themes and the research questions; each could be addressed separately but they were also connected as a whole.

The coding and memo writing processes were iterative, moving back and forth, from descriptive codes to increasing levels of analytical abstraction. The final nine thematic analytical memos adopted a common format that included a title (representing the theme, or story, underlying the data) a subtitle (the meaning of the theme in relation to the data as a whole), an overview of the theme, the key codes and sub-codes represented, a detailed discussion including linkages between analytical memos, a summary of how the theme/story fitted into the research questions and a visual image (screenshot) of the group cluster data showing the family of codes. A tenth analytical memo looked at the feedback from the five additional interviews with participants, noting how feedback reinforced or enhanced the understanding gained in the main memos (an example of the analytical memo template is included in Appendix F).

There are many different ways of approaching textual analysis and writing analytical memos. The researcher used analytical memo writing as part of the process of discovery (Abbott, 2004), recognising that the complexity of the data could only be interpreted at a deeper level. The memos used direct participant quotations to support the analysis. Whenever possible the researcher constructed the analysis around the words that the participants actually used in order to keep the analysis firmly grounded in the data.

3.11.4 Theoretical context

The participants' analytical story was evaluated within the theoretical context of the literature review to understand where new theory sits within the broad field of knowledge. Wagenaar (2011) describes the iterative process between the empirical data and the contextual and theoretical body of knowledge as the "dialogue between theory and data", a process of "moving back and forth between the literature and our own and others' research findings [*so that*] we find we have a better grasp of the field in that we better understand what is a good, relevant, worthwhile, or promising explanation and what is not" (Wagenaar, 2011, p.265-267, researcher's italics). This process of "comparison of the emergent concepts, theory, or hypotheses with the extant literature" is an essential feature of theory building (Eisenhardt, 1989, p.544).

3.12 Conclusions

The research is designed to explore the nature of strategic thinking from a more holistic approach, one that encompasses a full range of human capabilities of perceiving and understanding the world, including head (thinking), heart (feeling and relationships), body (senses, gut feeling and/or intuition) and spirit (a sense of knowing or connection to the whole). It is focused on how and why a sense of connection with the natural world contributes to the ability of the participants to think strategically within their organizations and achieve key strategic and operational objectives with limited resources.

This rationale, however, is only the starting point of the research process. The inductive research process enables a broader, richer story to emerge by allowing the data to speak for itself. Whilst the methodological approach is systematic and consistent, which increases validity, it is also rich with possibility arising from its central search for meaning, which emerges from the "unplanned, sometimes chaotic, and always intriguing character of ethnographic research" (Fetterman, 1998, p.2).

The chosen research methodology takes a pragmatic, practical approach to addressing the key objectives of the research. The use of an inductive, ethnographic research methodology, supported by a multi-method triangulated research design allows the capture of rich, deep data that mirrors the complex and holistic quality of strategic thinking. This provides a solid methodological foundation for generating practical as well as theoretical insights, which other researchers may be able to build upon outside the context of this research study, thus mitigating (but not altering) the lack of generalisability inherent in inductive and case study research.

Chapter 4. Data Analysis and Discussion

4.1 Introduction

This chapter summarizes the analytical story that has emerged from the participant data within the broad context of the literature. It also briefly reviews the experience of data collection and analysis, summarises the key conceptual insights that have emerged from the research study and compares them with the initial aim and rationale of the research to highlight those that go beyond the initial assumptions and preconceptions at the beginning of the research study.

The participants' analytical story is interconnected, holistic (partly reflecting the background of many participants as ecologists and scientists and/or familiar with working in this world) and it is deeply rewarding. The participants' views were often expressed forcefully and this is reflected in the story that has emerged. This contrasts with the more cautious approach adopted when discussing the participant data within the context of the body of the extant literature and the development of the theoretical and practitioner contribution in the conclusions (chapter 5).

The analytical process is textual, based on an inductive, ethnographic approach within the context of an embedded case study. Key themes emerging from participant data are explored systematically (thematic analysis) to extract meaning from the data and matched to the three research questions (sections 4.5, 4.8 and 4.11) and then linked together as a thematic map to form the participants' analytical story, an overarching narrative for the data.

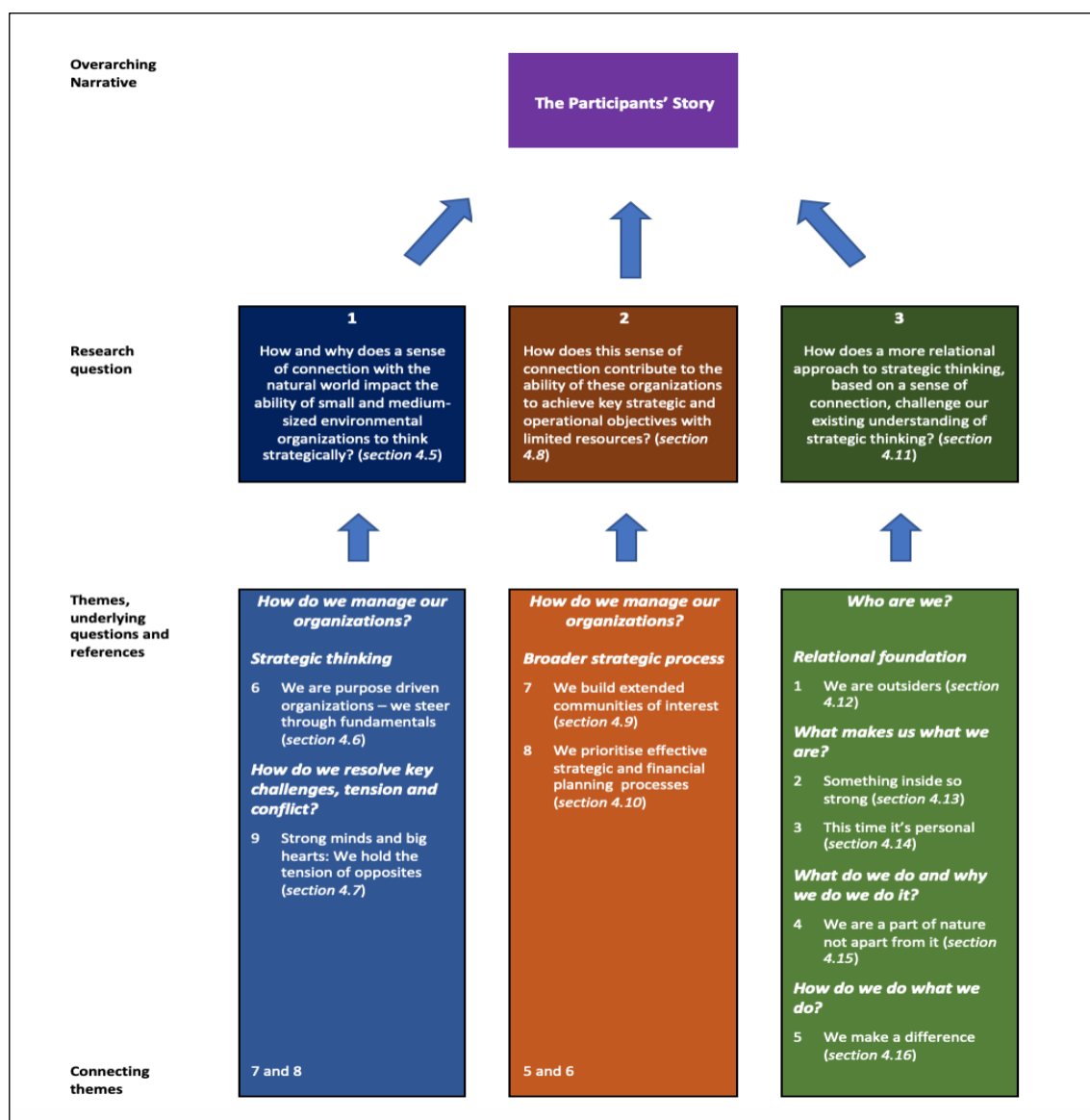
The participants' story is complex, subtle and multi-layered. It is presented top down but is often better understood bottom up. Individual themes are summarized, clustered by research question and then presented as an integrated story. The strong connection with nature underpins what participant organizations do and drives their strategic processes. Strategic thinking is embedded within these emergent, practice-based processes and much of the value of the research data is found in the detailed day-to-day practice of strategy by the participants. The holistic nature of the research has resulted in strong interconnectivity between the three research questions. At the same time each theme has an important and insightful narrative *in its own right* and makes an important contribution to the research as a whole.

The main themes of the analytical story are reflected in a broad range of the literature, most particularly in the complementarity of the strategic thinking and planning processes (both are critical to participant organizations), the different nature and scope of these core processes and the emergent, process-oriented nature of strategy within participating organizations, which strongly reflect accumulated practical experience (praxis). However, the integrated analytical story contains insights that are in areas that are currently under researched (governance, purpose driven organizations, managing stakeholders) or more often found in literature outside the business and strategy canon (the value of specificity, the ability to hold opposite perspectives).

4.1.1 Structure

This chapter has been structured to maintain the integrity of the participants' story, which has been developed through increasing levels of analytical abstraction. The analytical story is then discussed in relation to the body of the extant literature to assess where new theory and insights sit within the broad field of existing knowledge. The overarching narrative of the participants' story is summarised in section 4.3, with the underlying research questions discussed in more detail in sections 4.5, 4.8 and 4.11. At each level the conceptual insights (theoretical and practical) are explored within the theoretical context of the broad body of the literature and are linked to the broad themes that underpin the participants' story, as illustrated (in a simplified form) in figure 6:

Figure 6: Participants' Analytical Story (Simplified Form)



Source: Researcher data analysis

The holistic nature of the research field has resulted in strong interconnectivity between the three research questions, yet the data yields clear insights in each area as well within the overarching narrative. Although indicative literature references are included within the participants' analytical story,

the complex and contextual nature of the data often requires a high degree of specificity in the literature references, which is best presented in the sections devoted to the review of the theoretical context.

Although this chapter is structured top down for presentation purposes, clustering the themes by the three research questions and gradually increasing the level of analytical abstraction to produce an overarching narrative of the analytical story underlying the participant data, it is better understood from the bottom up. Participant organizations are purpose driven and relational (research question 3, section 4.11) and this drives the strategic process (research question 1, section 4.5) and enables them to leverage limited resources (research question 2, section 4.8).

This structure provides two pathways for following the analysis of participant data; the summaries by research question enable conceptual insights and theory development within the context of the extant body of the literature, whilst the underlying thematic analysis provide a wealth of detail for practitioners in the field, contributing to the praxis literature. In reality, the participants' story is deeply interconnected and the pathways are intertwined and both are essential for a full understanding of the data.

4.2 Research process

The choice of the research philosophy, approach and methods is founded on the principle that we can best understand a more holistic approach to strategic thinking by adopting a holistic, experiential, research framework using an inductive, qualitative approach drawing principally from ethnography. This approach not only generated rich, deep data but also data that reflected the interconnected and complex nature of the strategic process within participant organizations and yielded high levels of meaning.

The research is focused on small and medium-sized environmental organizations on the rationale that a connection with the natural world is important to fulfilling the purpose of the organizations, and therefore might be expected to impact on the nature of the strategic thinking process within them. The participant data shows a strong link between the nature of the strategic process (including the strategic thinking component) and the participants' connection with the natural world, which underpins the purpose driven nature of participant organizations.

4.2.1 Data analysis

Data analysis was a highly iterative process with an overlap between data collection and analysis and the frequent need to move between transcripts, memos and coding data to extract greater levels of meaning. The richness of the data was further enhanced by the triangulated multi-method approach as each data collection method yielded different, yet complementary, perspectives on the data. Participant observation at the workshop events, for example, captured participants' comments when they were not being recorded, which sometimes resulted in more open discussions. The researcher was able to observe the participants' body language more closely and a group dynamic sometimes encouraged participants to talk more openly and deeply about their values, beliefs, personal experiences and motivations, as well as express their feelings more openly. Similarly, some participants opened up more fully after the recorded

individual interviews had finished when the recording device was switched off.

The story that unfolded gradually was more complex than the researcher had initially expected and beyond his original preconceptions. There were many eureka moments where the participants' comments were linked together in surprising ways and the full significance of one element of the bigger story was recognised for the first time. This process was paradoxical. Sometimes the story that emerged was surprising but once it emerged it did not seem surprising at all (Wagenaar, 2011). Whilst the story was an abstraction it gelled with the source data from participants at the most detailed and personal level.

4.2.2 Nature of participant data

Participant data is rich, deeply multi-layered, interconnected and complex. Although meaning has emerged through increasing levels of analytical abstraction, reflected in the structure of the chapter, there is much value to be found at the level of individual participant comments, even those which appear to be prosaic, because they are often nuanced and carry many levels of meaning. As a result, the analysis of the themes underlying the analytical story are supported by extensive participant quotations, which both evidence the analysis and reflect the complexity and multi-layered nature of the data itself. Where full extracts are too lengthy to be included in the main text, or duplicate other examples, they have been condensed, whilst retaining the original words of the participants.

The amount of the research data collected is considerable (42 interviews, 38 participants and 29 participating organizations), which has resulted in tensions between parsimony (the succinct summary of large volumes of data) and the desire to exemplify the richness and complexity of the data. As each of the nine key themes tells an important story in its own right, a decision was made to fully acknowledge these stories in the textual analysis and explore the many levels of meaning that are contained within them, both in relation to the key research questions and in their own right.

4.3 Participants' analytical story

The analytical story is complex and interconnected. It is best understood from the bottom up. A strong connection with nature underpins what participant organizations do and drives their strategic processes. Strategic thinking is embedded within these emergent, practice-based processes and much of the value of the research data is found in the detailed day-to-day practice of strategy by the participants. Participants' responses were surprisingly consistent despite differences between the organizations (size, remit and structure) and the story that has emerged reflects the research group as a whole.

The holistic nature of the research field has resulted in strong interconnectivity between the three research questions, yet the data yields clear insights in each area of the research. The participants' story is told first as an integrated whole, where it is reviewed within the context of the body of the broad literature, which reveals where insights (theoretical and practical) sit within the existing knowledge in the field. The story is aligned with key elements of the core strategic and management literature but also

offers new insights and potential theory development that are beyond it, which draw from a broader literature base. Potential theory development is contextually bound but provides an opportunity for further research to determine applicability elsewhere.

This section sets out the full participants' story (section 4.3.1), a brief summary by research question with links to the more detailed analysis (sections 4.3.2 to 4.5.5), the theoretical context (sections 4.3.6 to 4.3.9), a comparison with the initial research aim and rationale (section 4.3.10) and a review of the working definitions adopted for the research study in the light of the results of research study (section 4.3.11).

4.3.1 Full story

Participants have a strong connection with the natural world, which reflects a broad spectrum of sensibilities (mind, body, heart and spirit) and perspectives (ecological, holistic and scientific) but it is the shared *experience* of that connection that binds them and underpins the purpose driven nature of their organizations:

“For some people, this is bordering on life and death importance ... there are people for whom ... finding that safe space is essential ... [*it involves*] all those kind of things that ... get turned into clichés about wellbeing but ... it's very nitty-gritty. It's absolutely specific. It's about the moment when you are ... looking at, touching, smelling sensing ... being in a place, being in contact with something physical or biological ... that's not you but is” (interview 3).

A strong, personal connection with the natural world does not, necessarily, lead directly to participant organizations developing a more overtly holistic or embodied strategic thinking process at an organizational level (section 4.11.7). There are other factors involved including the human dynamics of management (leadership characteristics, issues of power, control and influence and so on) but it does influence decision-making at the personal, individual level and this can be significant, particularly when individuals are in senior decision-making roles:

“Almost the most important thing is in the emotional engagement and an emotional connection because what we're trying to do is to get people to be inspired and for people to care ... I think its hearts and minds so ... it's about that emotional connection” (interview 19).

Significantly, there is also a strong indirect link to the nature of participant organizations, which are purpose driven and relational. They are underpinned by a shared experiential connection with nature, expressed through deeply shared values, mission and vision, which drives the strategic process, both formally and informally. Participant organizations exist to make a difference in the world and this is of the utmost importance to them. They are purpose driven not profit driven (research question 3, section 4.11):

“It sounds a bit pretentious to say it's my lifetime work ... but that's how I see it” (interview 10).

“You don't come [*here*] to earn lots of money. You come here to make a difference ... people do it because they're passionate about the environment. They actually want to make a difference” (interview 21).

Participant organizations have learned to speak different languages to different stakeholders and run

parallel processes, loosely equivalent to strategic planning and strategic thinking, which emphasize different aspects of the value of the natural world (primarily intrinsic value to 'insiders' and extrinsic value to 'outsiders'). They need *both* processes to be sustainable and to meet their core purpose. As a result, they have developed the ability to *hold* tensions that arise when the underlying perspectives and worldviews of key stakeholders' clash.

This allows participating organizations to leverage their limited resources by reaching out to their extended communities of interest (those who 'get it'), who provide long term financial stability and resource continuity, the bedrock support for long term sustainability (members' subscriptions, legacies and a commitment from volunteers and others to work for reduced, limited, or no financial reward). It also enables them to communicate, and work with, more traditional stakeholders, who are essential for financial sustainability and the ability to achieve organizational purpose (grant and project funding, access to policy makers and those in control of resources and power). It is the way in which these two areas act *together* that ensures the long-term sustainability of participant organizations and enables them to achieve their core purpose by leveraging their limited resources effectively (research question 2, section 4.8):

"I've always been impressed by [*our*] membership. They didn't join to get free access to properties, or for any other personal benefit. They got involved because they believe in what the organization stands for and because they support what it does. That is powerful" (interview 14).

Whilst the term strategic thinking was rarely used by participants, its function is embedded within participant organizations, formally and informally, operating at pivotal points and acting as a proxy for core purpose and values. It is a *way of thinking* (Liedtka, 1998, following Mintzberg, 1987a, 1994) rather than a formal process. Participants most often referred to it indirectly as a way of ensuring that the organization remains true to its guiding or first principles (the 'fundamentals'). It is linked closely to core purpose, mission, vision and values and it is the part of the decision-making process that keeps the participant organizations on track in terms of long-term strategic direction, organizational scope and boundaries, and the prioritization of key aim(s) and objectives. It overlaps with the strategic planning process and is complementary with it:

"If I didn't have an emotional connection to nature ... if it wasn't for my value system dictating that I have a connection to nature then I wouldn't be doing this because you certainly don't do this for the money ... you don't do it for any other reason other than being motivated by the feeling that nature deserves a better deal at the hands of humankind. So, that ... manifests in terms of strategic thinking" (interview 10).

Strategic thinking is both reflective and active and it is most frequently found alongside or within the relationship between the executive and non-executive teams (trustees) and the processes and coordinating mechanisms that integrate the strategic thinking and planning processes including broad stakeholder consultative processes. It is here that many of the most challenging issues, tensions and conflicts are surfaced, addressed, resolved or simply held. These can be sensitive so the process is often informal rather than formal and not always fully transparent (research question 1, section 4.5).

The strategic process is emergent rather than deliberate (Mintzberg, 1987a, 1987b. 1994) and strongly

influenced by practices developed over time, which points to the literature on praxis (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015).

4.3.2 Story by research question

Participant data is deep, rich and interconnected and some themes relate to more than one research question. Despite this complexity, once the component themes were clustered by research question, a compelling analytical story emerged for each question, which was integrated within the full, integrated narrative. The participant data also carries meaning at the level of the underlying themes, each of which has a narrative in its own right. This section briefly summarises the analytical story by research question and provides a link to the more detailed analysis and discussion of each question, supported by the cluster of themes that most closely relate to it.

4.3.3 Strategic thinking

How and why does a sense of connection with the natural world impact the ability of small and medium-sized environmental organizations to think strategically? (section 4.5).

Participant organizations navigate strategically through fundamental or guiding principles, which are closely linked to the organization's core purpose and deeply held value systems and act as a proxy for them. They are embedded within pivotal decision-making points within the organizations, which act as an equivalency to a formal strategic thinking process.

These pivotal points (principally found within the relationship between the executive and non-executive teams) act as a lynchpin to surface and address key strategic issues and tensions and conflicts that arise from meeting the different needs and perspectives of stakeholders. It is the ability to *hold* these tensions that enables participating organizations to reach out and engage their communities of interest *and* underpins their financial viability and sustainability with effective strategic and financial planning processes (a key contribution to research question 2). The analytical story relating to research question 1 is summarized in sections 4.5.1 to 4.5.2 and discussed within the context of the literature in sections 4.5.3 to 4.5.10.

4.3.4 Leveraging resources

How does this sense of connection contribute to the ability of these organizations to achieve key strategic and operational objectives with limited resources? (section 4.8).

The deeply relational foundation of participant organizations (research question 3) produces highly committed, often driven, organizations, which operate on limited resources and need to call on the goodwill, financial and personal support of others in order to achieve their objectives. They leverage these resources by running two parallel processes, loosely aligned to the strategic planning and thinking process, which enable them to speak different languages to different stakeholders; one stressing intrinsic

value internally, the other extrinsic value externally. They need to do *both* to ensure long term financial sustainability and meet their objectives and core purpose. The analytical story relating to research question 2 is summarized in sections 4.8.1 to 4.8.2 and discussed within the context of the literature in sections 4.8.3 to 4.8.5.

4.3.5 Purpose driven organizations

Research question 3: How does a more relational approach to strategic thinking, based on a sense of connection, challenge our existing understanding of strategic thinking? (section 4.11).

Participant organizations are purpose driven and relational, bound by shared values, beliefs and experience based on a strong connection to the natural world. This is the glue that holds them together and allows them to act collectively and make a difference. The purpose driven nature of the participating organizations is driving their strategic processes rather than the other way around. The analytical story relating to research question 3 is summarized in sections 4.11.1 to 4.11.2 and discussed within the context of the literature in sections 4.11.3 to 4.11.8.

4.3.6 Theoretical context

The complex, embedded and often informal nature of the strategic thinking process within the participating organizations reinforces the need to adopt an integrated, holistic approach to interpreting the participant data. The participants' analytical story is best understood in relation to a broad literature base, which enables each research question to be addressed separately but respects the deep level of connectivity in the participants' story as a whole.

4.3.7 Strategic thinking (RQ1)

Strategic thinking in participating organizations is a complex, embedded, interconnected and often informal process, which acts as a proxy for core purpose, shared values, mission and vision underpinned by a strong connection to nature. This connection is both direct and indirect, representing the purpose driven foundation of participant organizations (research question 3).

As the natural world is a complex environment, characterized by turbulence and uncertainty (Neugebauer, Figge and Hahn, 2015) the strategic thinking process of participating organizations is primarily emergent rather than deliberate (Mintzberg, 1987a, 1987b, 1994). It is embedded within the broader strategic processes and social networks (Granovetter, 2005) and coordinating mechanisms between these processes (Mintzberg, 1980), including strategic planning and governance. Strategic thinking and planning within participating organizations are different in scope, represent different ways of thinking (Mintzberg, 1987a, 1994; Liedtka, 1998) but are complementary and both are critical to the survival and success (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002).

When participants talked about strategic thinking (or the equivalency of it; it was rarely named directly)

they tended to view it as a *way of thinking* (Mintzberg, 1987a, 1987b, 1994), which reflected elements identified in the core strategic literature including a holistic perspective (Liedtka, 1998; Bonn, 2001), systems thinking (Senge, 1990; Liedtka, 1998; Bonn, 2005; Goldman and Casey, 2010; Mele, Pels and Polese, 2010; Moon, 2012), synthesis (Mintzberg 1994; Heracleous, 1998; Graetz, 2002), creativity (Mintzberg, 1987b, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012), divergent thinking (Bonn, 2001; Graetz, 2002; Moon 2012) and intuitive and innovative thinking (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002).

For participants, however, it is more than this; it is a way of *perceiving* the world, which is more holistic and relational. This links with the view of strategy as a mindset or a perspective, “an ingrained way of seeing the world” (Mintzberg, 1987a, p.16), one that is “whole-brained” (Graetz, 2002, p.460), one that is closely aligned to the participants’ holistic worldview, influenced by their ecological and scientific perspectives. This links to other environmental and sustainability literature, which ties performance to the way/manner in which organizations think, such as mindfulness-based approaches (Ndubisi, Nygaard and Capel, 2019).

The integration of strategic planning and strategic thinking in participant organizations is complex, often informal rather than formal, and embedded. They are distinct but complementary processes (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002) and both are critical for survival and success. When participants discussed their decision-making processes, particularly the ‘big’ strategic questions (long term strategic direction, changes in scope and organizational boundaries, monitoring strategic decisions against purpose, mission, vision, values, ethos and remit) their discussion tended to be fluid, creative, intuitive and holistic (Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012) as well as emergent (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015) suggesting that strategic thinking has a deeper quality; more complex, holistic and involving synthesis between different components to produce an integrated whole.

The participants’ descriptions of the strategic process often closely reflects Mintzberg’s process-oriented approach to strategy and strategic thinking (Mintzberg, 1987a, 1987b, 1994) rather than the more analytical and cognitive strategic models (Ansoff, 1965; Porter, 1991, 1996; Porter and Kramer, 2006, 2011). This included the nature of the strategic processes as fluid, emergent, creative and intuitive (Mintzberg, 1994) as well as the critical importance of mindset and perspective (Mintzberg, 1987a) and seeing strategy through the lens of different perspectives, patterns and streams of interrelated activities (Mintzberg, 1987a) that somehow come together when married to a deep sense of commitment (Mintzberg, 1987b; Drucker, 1989; Mintzberg et al., 1998; Collins, 2001). Participants also saw strategy as complex, interconnected and multidimensional (Mintzberg, 1994) as well as sometimes confusing, daunting and frustrating.

Where participants differ from the strategic literature is in the *intensity* of their connection with nature. This drives the strategic process as purpose driven organizations and underlies the emergence of their strategic processes, which have developed through practice and experience expressly to achieve their core purpose (research question 3).

4.3.8 Leveraging resources (RQ2)

The research participants focused on what they actually *did* rather than strategic theory. The strategic processes have emerged over time (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015) incorporating an important element of strategy-as-practice, accumulated practical learning and experience, which highlights the importance of the praxis literature (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015). This enables participant organizations to integrate different types of thinking and approaches within the decision-making processes (Regnér, 2003; Jarzabkowski, 2004) including the ability to hold the contradictory worldviews and perspectives of key stakeholders (Regnér, 2003; Jarzabkowski, 2004; BAM, 2018, 2019; Kaiser and Overfield, 2010). Participant organizations meet the needs of both their extended communities of interest, which are often embedded within the broader strategic process (Granovetter, 2005) and more traditional external stakeholders. This enables them to leverage their limited resources to achieve long term sustainability and meet their core purpose.

The governance process is key in participating organizations (BoardSource, 2005; Beng Geok, 2018) with the trustees playing an important role acting as custodians of organizational purpose, mission and vision (Low, 2006). The strategic thinking process is often found within or alongside the processes where the executive and non-executive teams interact. A strong sense of environmental stewardship, reinforced by strong network ties within the extended communities of interest, produce strong bonds of trust reinforcing a servant leadership governance model (Heuer, 2012).

Strategic planning is more formalized than strategic thinking and plays a key role in the operationalization of strategic thinking (Heracleous, 1998) and effective resource utilization (Hatten, 1982). However, when the strategic thinking component is partially embedded within or alongside it, the process remains fluid and responsive, reflecting an emergent quality (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015). These complex and interconnected processes (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002) underpin the ability of participant organizations to speak different languages to different stakeholders and surface, address, resolve or simply hold the conflicts, tensions and challenges that arise from the different underlying worldviews and perspectives of key stakeholders. Strategic planning has a key role to play alongside strategic thinking (Whittington and Cailluet, 2008).

4.3.9 Purpose driven organizations (RQ3)

Participant organizations are purpose driven and relational (Drucker, 1989; Beng Geok, 2018), the foundation for participants to work together collectively to make a difference in their field. They navigate strategically through fundamental or guiding principles, closely linked to the organization's core purpose (Ghoshal and Bartlett, 1993, 1997; Collins and Porras, 1996, 2005; Hollensbe et al., 2014; Beng Geok, 2018; Thakor and Quinn, 2018; British Academy of Management ('BAM'), 2018, 2019; Rey, Bastons and Sotok, 2019) and deeply held values (Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012), underpinned by their strong connection to the natural world (Kals, Schumacher and Montada,

1999; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Nisbet, Zelenski and Murphy, 2009). These guidelines, first or fundamental principles, both formal and informal, act as a proxy for core purpose and are embedded in pivotal spaces, critical decision-making points, within the organizations, which act as an equivalency to a more formal strategic thinking process.

During the interviews and workshop events participants resonated most strongly with the subject of connectivity with nature. When they were given the space to speak freely this was invariably the subject to which they returned. They discussed a broad and full range of sensibilities or intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011) with a strong emphasis on embodied forms of connection; heart-based, emotions and feelings (Goleman, 1996, 2004), body-based, intuition and the senses (Mintzberg 1994; Minocha and Stonehouse, 2007; Shapiro, 2011, 2019), a deep sense of knowing that was sometimes overtly spiritual (Zohar and Marshall, 2001) as well as a mixture of cognitive and more intuitive processes (Sanders, 1998; Calabrese and Costa, 2015). Overall, there was a strong relational component.

Whilst these are important in influencing individual decision-making it is the shared experience of that connection (specific and diverse) that binds them together and underpins the purpose driven nature of their organizations with a sense of universal shared meaning. This concept is more common in areas such as creativity and the arts (Cameron, 2016) and spirituality (Rohr, 2016, 2018). It was sometimes expressed as we 'get it', 'the thing', 'the spark' and it provides the glue that binds participants together in collective endeavour. Interestingly, even though the participants talked extensively about their *specific* connection with nature they shared important values that extend beyond it including compassion, empathy, equity, fairness, justice and, often, a passion for supporting others in a less fortunate position than themselves. These *universal* shared values played a key role in forming the 'normative glue' (Tichy, 1982) that binds together the cultures or ethos of the participants' organizations.

Participants often expressed the value of nature in intrinsic terms (Senge, 1990; Collins and Porras, 1996; Bonn, 2001, 2005; Mitchell, 2002; Schultz et al., 2004; McCarthy, 2009; Oliver 2009; Nicolson, 2013) and experiential terms (Mayer and Frantz 2004), which resulted in a strong sense of being different from mainstream society. Many talked about a sense of oneness with nature (Kals, Schumacher and Montada, 1999; Clayton, 2003; Dutcher et al., 2007), although each participant expressed this in his or her own way. Others linked a connection to nature with their sense of identity (section 2.13.2; Oliver 2009; Edwards, 2012; Murray-Fennell, quoting Mavor, 2015).

At the same time participants acknowledged the importance of rational, evidence-based thinking, particularly within the strategic planning process, as a necessity of organizational survival and sustainability and of the critical importance of understanding the extrinsic value of nature as humanity's life support system, a key message when reaching out to engage and communicate with society more broadly; "human survival is directly tied to our relationship with the natural environment" (Schultz, 2002).

Purpose drives participant organizations not profit and it is the touchstone against which key strategic decisions are measured (Drucker, 1989; BoardSource, 2005; Beng Geok, 2018; Rey, Bastons and Sotok, 2019). Changes to strategic direction, scope and boundaries are charged, very significant and not taken lightly. Core purpose, and the deeply held shared values that underlie it (Mitroff, 2016), are, in normal circumstances, inviolate, although the *interpretation* of purpose may change over time (section 4.5.5). This contrasts with studies of commercial organizations, where environmental leaders can be heterogeneous, even within the same sector, a difference that relates to underlying motivations and incentives as well as barriers to environmental leadership (Runhaar, Tigchelaar and Vermeulen, 2008). However, the subset of SME's within this study, those that are "green from an ideological motive" have very similar characteristics to the participant group; "sustainable out of conviction ... planet orientated ... mostly ecological ... [*and the*] environment is [*their*] reason for existence" (Runhaar, Tigchelaar and Vermeulen, 2008, p.175 and 177, researcher italics). Drucker noted the importance of purpose (mission) over 30 years ago:

"Nonprofits do not base their strategy on money, nor do they make it the center of their plans ... [*they*] start with the performance of their mission" (Drucker 1989, p.89) [*and they are*] "generating a powerful countercurrent. They are forging new bonds of community, a new commitment to active citizenship, to social responsibility, to values" (Drucker, 1989, p.93, researcher italics).

4.3.10 Research aim and rationale

The aim of the research is to explore the nature of strategic thinking from a broader and deeper perspective, one that potentially encompasses a diverse range of human sensibilities of perceiving and understanding the world and moves beyond the predominantly Cartesian worldview that traditionally underlies strategic thinking. The underlying rationale is that there is a value in our connection to the natural world, which may contribute to this ability to see a bigger, more holistic picture within the context of the strategic thinking process.

The analytical story that has emerged is more complex, subtle, interconnected and multi-layered than the research aim and rationale suggests. Participants have a strong connection with the natural world, which reflects a broad spectrum of sensibilities but it is the shared *experience* of that connection that binds them together, forms the basis of collective action and underpins the purpose driven nature of the organizations. A connection with the natural world does not, necessarily, lead to a more holistic or embodied strategic thinking process. The influence is foundational but primarily indirect, bound up with a strong sense of mutuality of purpose and deeply shared values expressed as a desire to make a difference in an area that is of the utmost importance to them.

Participant organizations are purpose driven and relational. They are driven by purpose not profit. This key difference in focus underpins a number of insights that have emerged from the research data including the importance of the experiential process of connection that is shared between participants (research question 3, section 4.1.1), the way in which participant organizations communicate with and balance the interests of different stakeholders (research question 2, section 4.8) and the way in which they resolve, or simply hold, differences between the perspectives and worldviews of those stakeholders (research question 1, section 4.5). These insights have been integrated into the discussion of the

participants' full story and the analysis and discussion by research question.

4.3.11 Key definitions

Participant data confirmed the working definitions of a connection to nature (chapter 2, section 2.14) and an environmental organization (chapter 3, section 3.8.2). However, it provides a more specific and robust definition of strategic thinking in participant organizations, which incorporates the practical, emergent and more holistic nature of the participants' strategic thinking process (Mintzberg, 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002):

'Strategic thinking is a *way of thinking*, all those activities, both formal and informal, that enable an organization to see a whole picture and integrate different aspects of that picture within its key decision-making processes in order to maintain a long-term sustainable position, combined with a capacity to act in order to achieve its core purpose' (section 4.5.11).

4.4 Supplementary feedback interviews

Five feedback interviews on the preliminary findings of the research (Appendix C) were conducted at the end of the field research (chapter 3, section 3.10.3). The feedback provided a further cross check within the data analysis process and confirmed the data patterns, threads and insights underlying the emerging participants story to date. As this exercise was limited to a sample of five participants, the data was coded and analysed separately so that individual views were not over-represented in the overall data set. The interviews also confirmed that saturation had been reached as participant responses fitted clearly into existing themes with no new insights emerging. Participants were also given an opportunity to comment on anything important that was not represented in the summary and this elicited no new data. The participants' feedback is summarized as theme 10 and included in Appendix C.

The feedback supported the underlying narrative of the data that had emerged from the primary interviews and workshop events. However, the power of the process was surprising. Participants were keen to engage and gave their time willingly. The depth of this engagement is important. Interestingly, as a group, participants spent over half their time in these interviews talking about their connection with nature and less time considering the preliminary findings on the strategic process (in line with the earlier interview experience). They confirmed that they are purpose driven and that the strategic process is way of achieving that purpose. The foundation of their strategic approach is relational. They also felt that they were truth tellers, acknowledging the seriousness of an environmental crisis that mainstream society has not yet fully taken on board. Again, this is in line with the earlier interview process and data.

The expression 'this means everything to us' (theme 10, Appendix C) best encapsulates what the participants do, why it is important to them and how it relates back to their connection to the natural world (research question 3, themes 1 to 4, sections 4.12 to 4.15). The connection with the natural world is critically important to them, it is central to their lives and it plays a key role in defining their sense of meaning and personal and collective identity.

Three participants confirmed that they were using specific insights gained from the research process; two

had applied them to the internal strategic process of their organization (supplementary interviews 2 and 5) and one had applied them both internally and externally within the sector (supplementary interview 3). This points to the capacity of the research study to make a contribution to practice in the field as well as theoretical development:

“I’ve not seen some of the specific governance, strategy and operational challenges we face as an environmental organization captured and articulated in this way and that is useful. What you’ve done makes sense to me and has also helped spark a couple of actions for our team in terms of our own organizational development and strategic thinking. Importantly, there were also some proof points and wider industry and context setting coming through here for strategic approaches we are currently taking” (supplementary interview 3, participant email, June 2019).

4.5 Nature of strategic thinking (RQ1)

How and why does a sense of connection with the natural world impact the ability of small and medium-sized environmental organizations to think strategically?

This section summarizes the participants’ analytical story in relation to research question 1 (sections 4.5.1 to 4.5.2) and discusses it in relation to the wider body of literature (section 4.5.3 to 4.5.9). For clarity some key literature references are integrated into the participants’ analytical story but the full literature discussion is in the sections on theoretical context that follow. This maintains the flow of the analytical story and the strong focus on participant data. The participants’ story is further explored by unpacking the key underlying themes (sections 4.6 and 4.7), each of which has its own narrative.

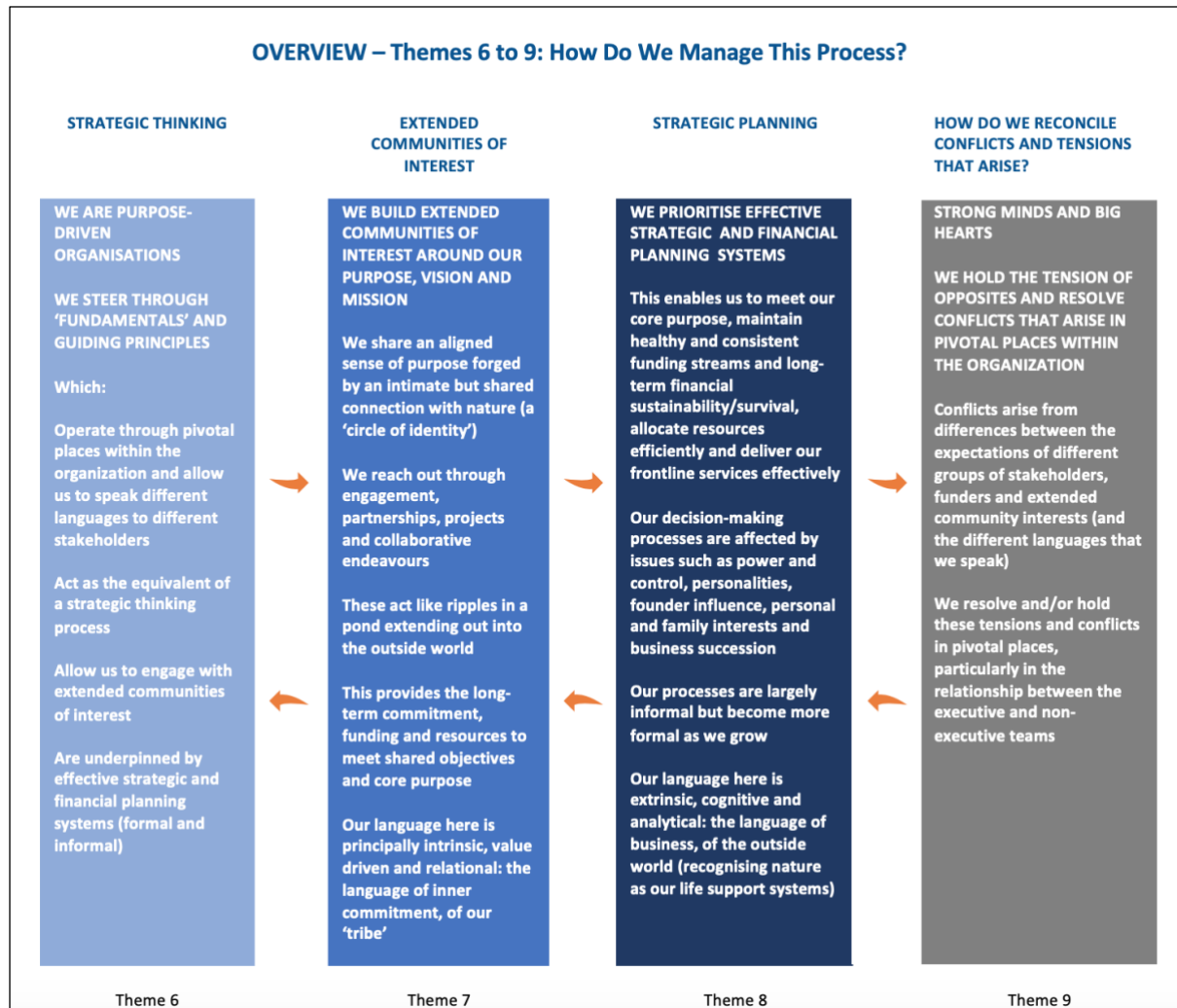
4.5.1 Structure: Key themes and relationships

The first research question is focused on the nature of strategic thinking, which is addressed in themes 6 to 9. Themes 6 to 8 relate to the question, ‘how do we manage our organization?’ and theme 9 asks ‘what key challenges prevent us from doing what we do and how do we resolve these issues?’ These themes are key components of the participants’ story relating to research question 1 (sections 4.5.2 to 4.5.11) and are explored further, as individual narratives, in the following sections:

- Theme 6: Strategic thinking: We are purpose driven organizations: We steer through fundamentals (section 4.6).
- Theme 7: Extended communities of interest (section 4.9).
- Theme 8: Effective strategic planning and financial systems (section 4.10).
- Theme 9: Strong minds and big hearts; dealing with conflicts and tensions (section 4.7).

This structure provides two pathways for following the analysis of participant data, each of which adds value. The summaries by research question provide a pathway to conceptual insights and theory development within the context of the extant body of the literature. The thematic analysis allows us to go deeper into the participant story and thematic narratives, providing a wealth of detail for practitioners in the field, contributing to the praxis literature. The themes relating to research question 1 are illustrated in figure 7:

Figure 7: Role of Strategic Thinking Within the Strategic Process (RQ1)



Source: Researcher data analysis

The participant data is complex and interconnected and themes often relate to more than one research question. Themes 6 to 9, for example, are key to both research questions 1 and 2 and theme 6 (purpose driven organizations) links research questions 1 and 3. These linkages are noted in the data analysis and discussion but for ease of presentation research question 1 primarily addresses themes 6 and 9 (those uniquely related to strategic thinking) and research question 2 primarily addresses themes 7 and 8, which are key to the way in which participant organizations leverage their limited resources. In order to integrate the literature discussion more effectively, the key literature relating to research questions 1 and 2 is considered together in the discussion on theoretical context in research question 1 (sections 4.5.3 to 4.5.11).

4.5.2 The participants' story

The strategic process within participating organizations is complex and interconnected (Mintzberg 1994; Heracleous, 1998; Bonn, 2001, 2005; Graetz, 2002). They are driven by purpose not profit and are

strongly relational (Drucker, 1989). Participants work together collectively to make a difference that reflects their shared experiential process of connection to nature (research question 3, section 4.11):

“If I was trying to have an easy life, no, but that’s not the job. The job is actually to try and find a way of protecting this place for future generations. It’s as simple as that” (interview 18).

A strong, personal connection to the natural world does not, necessarily, lead directly to participant organizations developing a more overtly holistic or embodied strategic thinking process. There are other factors involved including the human dynamics of management (leadership characteristics, issues of power, control and influence and so on) but it does influence decision-making at the personal, individual level and this can be significant, particularly when individuals are in senior decision-making roles. There is a stronger link to the purpose driven, relational nature of participant organizations (research question 3, section 4.11). They are underpinned by a shared experiential connection with nature, expressed through deeply shared values, mission and vision, which drives the strategic process, both formally and informally:

“I think we have a moral responsibility ... I don’t view humans as more important than the rest of the ecosystem and, in fact, they’re all interconnected and ... ultimately it will all come back on us as well and affect us negatively ... but even if that wasn’t the case ... I think we have this responsibility to care for the rest of the living organisms living on it” (interview 8).

Several participants used the expression, ‘the golden thread’ (the idea of a thread within us that is connected to our purpose and runs through our lives) to link this sense of connection from deep personal experience to shared collective understanding and then through to organizational purpose, mission, vision and finally outcomes:

“it’s the golden thread isn’t it, it’s the [*shared*] understanding ... all of my teams are fully aware of what the wider goals are and what we’re working towards ... they are very clear on what their part is within it ... if there’s not a ‘golden thread’ ... bringing it all together then you end up with ‘mission shift’ ... ‘this is why we are doing that, that’s why it ties in’ ... they get it, they understand where they’re part of the bigger picture and how that works” (interview 23).

Participant organizations have a strong focus on working together collectively to make a difference in their endeavour (research question 3, section 4.11). However, they navigate strategically through ‘fundamental’, first’ or guiding principles, which are closely linked to the organization’s core purpose (Collins and Porras, 1996, 2005; Beng Geok, 2018; Rey, Bastons and Sotok, 2019), deeply held value systems and culture (Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012; Mitroff, 2016), underpinned by their strong connection to the natural world. This underpins the strong sense of vision that participant organizations exhibited, which was founded on a “deep understanding of [*the organization’s*] reason for existence and its core values, that is, fundamental and enduring principles that guide and inspire people throughout the organization and bind them together around a common identity” (Moon, 2012, researcher italics). These guidelines, both formal and informal, act as a proxy for core purpose and are embedded in critical decision-making points within the organizations. These pivotal points act as an equivalency to a more formal strategic thinking process:

“As the organization has got bigger we’ve brought in people who actually are better at running a business, than running a group of volunteers who are passionate about a mission, so therefore, you get in other influences, so they might come from banking or they might come from business

... but, actually, as long as we're clear their values are the same ... we can't bring people in who've got the wrong values and might actually just take us off on a mad [*deviation*]" (BW5, group interview 33).

The consideration of fundamentals and guiding principles at key points within the strategic processes of participating organizations served as a place of strategic reflection, often at points where key strategic processes (including governance) were linked to core purpose, mission, vision and values or where they were translated into operational strategies and action. Participant organizations differed both in how this was structured (whether formal or informal), where it was placed within the strategic process and other factors such as organizational culture, management style, structure, size and the balance of power between the executive and non-executive teams. It was best recognised by its quality; a place where current decisions (strategic and sometimes operational) could be questioned and evaluated by reference to the organization's purpose.

This reflective space thus operates as a *lynchpin* within the organization, a place that fulfils a vital role (literally a pin that passes through the end of an axle to keep a wheel in position), in other words, one that keeps the organization on track but is also flexible and dynamic. This provided an equivalency with a more formal strategic thinking process, including issues around long-term orientation and direction, the creation of a sustainable strategic position in the organization's chosen field, a deeper understanding of the essence, mission or remit of the organization, its scope and boundaries and so on. As participating organizations are purpose driven, rather than profit oriented, the strategic thinking process is bounded by purpose, vision, mission and shared values, which, generally, do not change. So, often 'fundamentals' are used as a way of keeping the organization on track; a way to steer or navigate them through difficult territory or challenging decisions:

"What difference are we going to make to the environment? What difference are they going to make to people's lives?, which are two strands of our mission ... we should answer those questions every time. Basically, do these fulfil what [*the organization*] is all about" (interview 21).

These pivotal decision-making points are embedded throughout the organization, primarily within, or alongside, the relationship between the executive and non-executive teams but also within the integrating mechanisms between the strategic thinking and planning processes and in broad consultative processes that reach out to extended communities and integrate them into key aspects of the organization's strategic process overall. In smaller organizations they are found in informal meetings and get-togethers, often led by founders or small teams. They are the heart of strategic thinking, a *way of thinking* within the organizations (Mintzberg, 1987a, 1994; Liedtka, 1998) and often deal with the tensions and conflicts that arise from meeting the needs, opposing worldviews and perspectives of different stakeholders (research question 2, section 4.8), integrating the strategic processes (formal and informal) and staying aligned with core purpose and values:

"We had to think about it from first principles. So what are the principles on which the [*organization*] is founded? What are its key purposes?" (interview 14).

"The important thing when we start new project is ... sharing our philosophy ... if [*it*] causes many people happier I will go on [*with*] this project" (interview 6, native Japanese speaker).

Most participants did not formally use the terminology, strategic thinking. The strategic thinking process is informal and has emerged within the participating organizations (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015). It reflects the importance of purpose, mission, and vision within the organizations (Drucker 1989; Senge, 1990; Collins and Porras, 1996, 2005; Bonn 2001, 2005; Moon, 2012; Hollensbe et al., 2014; Beng Geok, 2018; Rey, Bastons and Sotok, 2019), shared values and culture (Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012) and a connected, systemic or holistic approach with creative, intuitive, innovative and divergent components (Senge, 1990; Mintzberg 1994; Heracleous, 1998; Liedtka, 1998; Graetz, 2002; Goldman and Casey, 2010). However, it is also strongly process oriented and draws heavily on praxis, the participants' accumulated experience of strategy-as-practice:

"That is what success is, but there are all those little steps on the way that are getting you towards that ... For us that's success. Just those smaller steps ... we went out to do that and we did it" (interview 28).

"I had always wanted to set up [*my animal welfare concern*] as a rescue and bless them [*the business advisers*], they were lovely, but they're trained to make you make a business that makes money and they didn't really understand what I was trying to do ... I had the guts to put my foot down and say, 'look with all due respect, this isn't what I want to do, this isn't what I want to achieve'. I sacked my business advisor [*laughs*], the [*funder's*] business advisor. And, yeah, just went it alone and haven't looked back" (interview 29).

There was often a sense that whilst participants did not use (or sometimes understand) what strategic thinking was, they referred to an equivalent way of thinking, which they used to lift the organization out of the day-to-day complexity and, sometimes, chaos of organizational life and hold a bigger picture that steered or navigated them to be able to fulfil its purpose more effectively. This includes being able to see the wood from the trees, adopting a longer-term perspective, prioritising projects and activities, and being able to adopt different perspectives when facing complex decisions:

"We've got a huge job to do. How do you prioritize ... we just felt like we were doing everything for everybody ... and there's a bit of a headless chicken thing going on there isn't there... it's just trying to focus on what *will* make a difference it's always been a challenge but ... I would also say that, we weren't very great strategic thinkers and it's only in the last five years that that's sort of started to come more to the fore. Because it was survival half the time, survival and just doing the best we can and ... if your volunteers are here that's [*when*] you're going to do something" (interview 7).

In this sense, the participants' analytical story is closely aligned to Mintzberg's broader, process view of strategy and strategic thinking (Mintzberg, 1987a, 1987b, 1994; Mintzberg et al., 1998), one that is grounded in practical action, shaping the process to best suit their organizational needs and purpose (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015). The strategic decision-making process is emergent by nature and extends into, and is embedded within, external communities that share a common sense of purpose and values (Granovetter, 2005).

The informal strategic thinking process operates alongside, and sometimes within, a parallel strategic planning process, which is generally more formalised, yet still includes a significant informal element (particularly in the smaller participant organizations). These loosely integrated processes emphasize different aspects of the value of the natural world (primarily intrinsic value to 'insiders' and extrinsic value

to 'outsiders'). Participant organizations need *both* processes to be sustainable and to meet their core purpose. As a result, they have developed the ability to *hold*, as well as revolve, tensions that arise when the underlying needs, perspectives and worldviews of key stakeholders' clash (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010), which contributes to their ability to leverage their limited resources (research question 2, section 4.8):

"What we're very keen to do is to work across all stakeholders and, of course, stakeholders have their own interests, and they can often conflict with one another, so what we're very anxious to do is to ensure that we understand where they're coming from, and try to seek a compromise, a balance that will achieve our aims of conservation ... with what their interests may be, which may be economic, may be social or cultural, whatever. So, a lot of what we are doing is working with ... industry or it might be fishermen, or it might be [*the*] oil and gas industry" (participant 8).

Strategic thinking and planning are complementary and support each other (Mintzberg, 1994; Heracleous, 1998) although they are different in scope (Mintzberg 1994). Participants often use strategic planning processes in the operationalization of strategies (Heracleous, 1998) but the reality of the strategic processes within participating organizations is much more complex than a conceptual divide between strategic and operational decisions suggests. In fact, participating organizations often applied the same core principles to both strategic and operational decisions.

4.5.3 Theoretical context

This section examines the analytical story emerging from the participant data within the body of the literature in two key areas; the nature of the strategic thinking process and its relationship to other key processes within the organization, including strategic planning, governance and conflict resolution. The strategic literature is informative in relation to the embedded strategic thinking process that has emerged within participant organizations but the analysis results in a number of gaps, which are addressed by looking at the wider body of literature.

These sections (4.5.4 to 4.5.11) compare and contrast the analytical story of the research participants with the literature on the characteristics of the strategic thinking process (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012), the broader literature on the strategic process (Mintzberg, 1987a, 1987b; Porter, 1991; Mintzberg et al., 1998; Stead and Stead, 2000; Porter and Kramer, 2006, 2011; Neugebauer, Figge and Hahn, 2015), the specialist literature including governance, not-for-profit literature and conflict resolution (Drucker 1989; BoardSource, 2005; Low, 2006; Kaiser and Overfield, 2010; Hurth, 2017) and the praxis literature (Whittington, 1996; Regnér, 2003; Jarzabkowski, 2004; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015).

Research question 2 (section 4.8) explores the literature on the relationship between the strategic thinking and planning processes in more detail (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Graetz, 2002), which act *together* to ensure the long-term sustainability of participant organizations and enables them to achieve their core purpose by leveraging their limited resources effectively. Research question 3 (section 4.11) looks at the literature relevant to the nature of participant organizations as purpose driven and relational (including organizational and process literature, not-for-profit and nature-

based literature). In order to integrate the theoretical context more effectively, the key literature relating to both research questions 1 and 2 is considered below.

The key areas discussed in this section are the purpose driven nature of participant organizations (section 4.5.4), the nature of the strategic thinking process (section 4.5.5), emergent strategy (section 4.5.6), the relationship between strategic thinking and planning (section 4.5.7), conflict resolution (section 4.5.8), strategy as practice (section 4.5.9), strategic thinking as a holistic discipline (4.5.10) and a data driven definition of strategic thinking (section 4.5.11).

4.5.4 Foundations: Purpose defines strategy

The strategic decision-making processes that participants described had a long-term orientation, were driven by a strong sense of purpose (mission, vision and values), were holistic and systems oriented (sections 4.5.5 and 4.11.7), were sometimes expressed in terms of intelligent opportunism (Liedtka, 1998) and involved a more embodied approach, including an important intuitive element. The central motivation of participant organizations is purpose not profit, which is supported by a relational foundation, including strongly held shared values and beliefs (research question 3, section 4.11). Unless there are exceptional circumstances (for example, the extinction of a species in a single-species charity) participant organizations are not seeking to redefine their core purpose, mission or vision, challenge their remit or to “redefine industries”, in the same sense that commercial organizations, founded on a profit orientation, might do so (Heracleous, 1998, pp.485-486; Drucker, 1989; Beng Geok, 2018).

There is a growing recognition in the literature of the importance of organizational purpose and values in creating a long-term sustainable position for a wide spectrum of organizations; commercial (Ghoshal and Bartlett, 1993, 1997; Kenny, 2014; Mitroff, 2016; Hurth, 2017, Hollensbe et al., 2014; Thakor and Quinn, 2018; BAM, 2018, 2019; Rey, Bastons and Sotok, 2019), small and medium-sized enterprises (Runhaar, Tigchelaar and Vermeulen, 2008) and not-for-profit concerns (Drucker, 1989; BoardSource, 2005; Beng Geok, 2018). This complements the literature on organizational and process frameworks (chapter 2, section 2.8.2), which recognise the importance of purpose, vision, mission, values and beliefs (Collins and Porras, 1996, 2005) and identify organizational culture as a key success factor in organizations (Allio, 2006; Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012). This literature has a strong relational dimension and is discussed in more detailed in the theoretical context for research question 3 (section 4.11.6).

The strategic thinking process of participating organizations is thus bounded by organizational purpose, which drives the strategic decision-making processes, including both the strategic thinking and strategic planning components, and plays an important role in enabling them to leverage their resources (section 4.5.7; research question 2, section 4.8):

“The distinctive feature of non-profit organizations is that their fundamental purpose is socially grounded and it is this, notwithstanding the diversity amongst them, that determines the organization’s strategic questions of: ‘who are we, what we do and why are we here’ “ (Siong, 2018, Foreword to Beng Geok, unpaginated).

“CEO’s of ‘purpose-driven organizations’ do not pursue growth and profits for their own sake. In short, they are not willing to do anything that will compromise their basic values” (Mitroff, 2016).

“The fundamental question is not choosing between purpose and strategy but instead putting *purpose at the center of strategy* ... While purpose should not be considered a strategy, purpose requires strategy” (Rey and Ricart, 2019, p.49, italics in original).

This sense of purpose is embedded within the organizations through shared values and beliefs and is underpinned by the participants’ strong, personal connection with the natural world (research question 3, section 4.11, section 4.11.6). Critically, this links the strategic process from the top to the bottom, both upwards to core purpose, mission and vision and downwards to the strategic processes and operational implementation. It does this by bringing all aspects of the organization together, referred to by several participants as a “golden thread” (section 4.5.2). This shared sense of purpose, based on deeply held values acts as a powerful normative glue that holds the organizations together and allows them to achieve collective goals (section 4.11.6). Although participant organizations do compete as well as collaborate (theme 7, section 4.9.7) they are essentially collective endeavours framed by this relational, purpose driven foundation.

As participant organizations are purpose driven not profit-oriented this remains the touchstone against which strategic decisions are measured (Drucker, 1989; Beng Geok, 2018; Rey and Ricart, 2019). Organizational purpose, together with underlying deeply held values and beliefs (often termed the ethos of the organization by participants) define the organizations. The strategic question, ‘what business are we in?’, is addressed in relation to core purpose and changes to organizational scope and boundaries are significant and not taken lightly. In this there is a difference in emphasis between the participants’ data and the mainstream literature. Whereas commercial organizations might set out to “discover” their purpose and values (Collins and Porras, 1996, p.71) participating organizations are overtly purpose driven; it is in their blood, their DNA, and it “provides the glue that holds [*the*] organization together through time” (Collins and Porras, 1996, p.66).

In short, core purpose and values are key and *define* the participating organizations. They act as the “core ideology ... the enduring character of an organization ... what we stand for and why we exist” (Collins and Porras, 1996, p.66). This remains fixed while “business strategies and practices endlessly adapt to a changing world” (Collins and Porras, 1996, p.65). Thus, although many strands of the strategic literature resonate strongly with the participant data, they are generally focused on commercial, profit-driven organizations, whilst participant organizations are strongly purpose driven and relational. This is a fundamental and important difference. For the participants, mission (or purpose) is everything (Drucker, 1989; Beng Geok, 2018; Rey and Ricart, 2019). This is also why the participants’ analytical story is best read from the bottom up, from the participants’ strong and shared sense of connection with the natural world (research question 3, section 4.11). This is where the ‘fire in the belly’ that propels them emanates from.

4.5.5 Strategic thinking in participant organizations

Participating organizations are small and medium-sized and have a diversity of strategic processes, with

the degree of formality increasing with size but with many processes remaining informal and embedded within the organization. Participants rarely referred to strategic thinking in a formal sense. Instead, they talked about navigating through 'fundamental', 'first' or guiding principles, which play an important role in interpreting organizational purpose at all levels (both strategic and operational). Participants who were aware of strategic thinking equated it with a *way of thinking* (Liedtka, 1998, following Mintzberg, 1987a, 1994) connected to the core values or purpose of the organization, which allows the individual or the organization to make better, more measured, more holistic, strategic (meaning big or important) decisions about the fundamentals, what the organization is all about:

"Here *strategy is a perspective*, its content consisting not just of a chosen position, but of an ingrained way of perceiving the world" (Mintzberg, 1987a, p.16, italics in the original).

"I define strategic thinking as a particular *way of thinking*, with specific attributes" (Liedtka, 1998, p.122, researcher italics).

Participants have a strong scientific and ecological perspective (theme 2, section 4.13) and they see their work and their underlying relationship with the natural world in holistic and interconnected terms. The literature on the nature of strategic thinking often reflects a similar connected perspective; holistic (Liedtka, 1998; Bonn, 2001), systems thinking (Senge, 1990; Liedtka, 1998; Bonn, 2005; Goldman and Casey, 2010; Moon, 2012), synthesis or synthetic thinking (Mintzberg 1994; Heracleous, 1998; Graetz, 2002) and/or drawing from a deeper or broader place, for example creativity (Mintzberg, 1987b, 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012), divergent thinking (Bonn, 2001; Graetz, 2002; Moon 2012) and intuitive and innovative thinking (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002).

As a result, the strategic thinking process of participant organizations is closely aligned with the literature on the importance of core purpose (Collins and Porras, 1996, 2005; BoardSource, 2005; Mitroff, 2016; Beng Geok, 2018; Rey, Bastons and Sotok, 2019) and mission, vision, shared values, beliefs and culture (section 4.5.4) but also shares much in common with the core literature on the nature and process of strategic thinking. It is also practical and participants use 'fundamentals', 'first' or guiding principles, as a proxy for organizational purpose and values in day-to-day decision-making. Finally, participant organizations tend to think long term, sometimes very long term (theme 6, section 4.6.4) and it is often within this context that they consider the long-term strategic direction, scope and boundaries of the organization, the full equivalency of a strategic thinking process.

Over the longer term, or as a result of significant external changes (critical climate or environmental changes and/or societal issues) purpose may be re-examined and/or realigned to reflect changed circumstances, although underlying values remain unchanged. This is an important and significant distinction. In normal circumstances purpose is also a constant, although the *interpretation* of purpose may also change over time.

Although it was sometimes difficult to align the participants' description of their strategic processes with the academic literature (partly due to the level of complexity involved but also due to the very different language used) the *underling nature* of the process of strategic thinking that participants described, as a

way of thinking that is essentially long term, deeper, more holistic and is focused on the core of what an organization is 'all about', was closely reflected in the core literature on strategic thinking. This strong process alignment was, perhaps, surprising, given the very different focus of the participant organizations; not-for-profit, purpose driven and relatively small, rather than profit oriented, often larger, commercial organizations, which are the primary focus of the extant body of the literature.

4.5.6 Emergent phenomenon

Whilst the participants share a holistic and interconnected worldview, and their practice of strategic decision-making incorporates elements of this, they tended to describe strategy in more fluid, process terms, essentially something that is necessary to do well in order to achieve their organizational purpose. Descriptions of the strategic process were often informal and emergent (Mintzberg, 1987a, 1987b, 1994), bounded by organizational purpose, mission and values, but fluid and flexible in approach. These processes often extended, formally or informally, into their communities of interest, thus embedding the strategic process within a broader base (Granovetter, 2005). In short, there was an important emergent quality to them.

Whilst the strong purpose driven nature of the participant organizations bounded the strategic thinking process (including the essence of the organization and core aspects of the long-term direction, mission and vision), the strategic options, the setting and prioritizing of objectives, issues of organizational scope and boundaries were more fluid, innovative and responsive with an emergent rather than a deliberate quality. Once these were clarified and agreed the strategic planning process (particularly in the larger organizations where it was more formal) was more analytical, structured and cognitive, reflecting the perceived need by participants for clarity and effectiveness in operational matters. Smaller participants had more open, informal and fluid processes so the distinction was less marked as size decreased.

As a whole, the participants' analytical story is most closely aligned to Mintzberg's broader, process view of strategy and strategic thinking (Mintzberg, 1987a, 1987b, 1994; Mintzberg et al., 1998). This may be partly contextual. The natural world is a complex environment, characterized by turbulence and uncertainty (Neugebauer, Figge and Hahn, 2015), which elicits a complex response, which, in turn, plays a critical role in defining the strategic thinking process:

"This view of strategy making as a creative, dynamic, responsive, and often intuitive, process within the framework of a largely unpredictable environment fits ... closely with the concept of strategic thinking" (Graetz, 2002, p.456).

The strategic thinking process in participating organizations has emerged within this context and is complex, embedded within organizational processes and coordinating mechanisms and more often informal rather than formal. Mintzberg asserts that strategic thinking is "by its nature, complex and difficult ... an immensely complex process, which involves the most sophisticated, subtle, and at times, subconscious elements of human thinking" (Mintzberg, 1994, p.111). Despite the relatively small size of participating organizations, those participants who discussed strategic thinking did so in similar terms. Regardless of what terminology was used, there was a broad consensus that the thinking qualities that

strategic thinking represents are hard, rather rare, confusing but critical in the strategic decision-making process.

Participants did not necessarily link the term, strategic thinking, to the informal, emergent processes that existed within their own organizations but did describe these processes as a *way of thinking* that reflects many the main themes in the academic discussion of strategic thinking in the body of the literature (section 4.5.5):

"I am interested in how people do strategic thinking ... in how we get better decision-making ... particularly in governments and so on and ... a part of that has got to be using different ways of working, One thing I'm interested in is in scenario planning type stuff because it's a way of getting people to look at different things that they would not normally look at, instead of following a funnelled vision of 'we're here, we think this is the answer, that's where we're trying to go, how do we get there as quickly as possible'. I'm just interested in that kind of whole area of how we get people to start looking wider, more widely and more strategically instead" (interview 15).

Some of the research participants, particularly the smaller ones, perceived strategy as an analytical discipline, which was not aligned with the practical reality of their decision-making processes. One participant, for example, called strategy a "stupid word ... a horrible word ... one of the most overblown things that there is, it really is. What do you want to do, how you're going to do it, really that's strategy" (interview 35). Interestingly, the participant went on to describe the strategic process in his/her organization in detail, including a strong reflective element ('where are we now?'), which closely reflects many elements of Mintzberg's process view of strategy. In the participant's view, strategy came from thinking and *not* thinking, which mirrors Mintzberg's view of strategy as resembling a craft rather than a pre-determined process; the metaphor of a potter at work (Mintzberg 1987b):

"Our potter is in the studio, rolling the clay to make a waferlike sculpture. The clay sticks to the rolling pin, and a round form appears. Why not make a cylindrical vase? One idea leads to another, until a new pattern forms. Action has driven thinking: a strategy has emerged" (Mintzberg, 1987b, p.77).

When participants described their practical, strategic decision-making processes, it was, most often, as fluid interconnected processes, strongly rooted in organizational purpose and values and involving *both* a thinking process and a set of actions and "a whole range of possibilities in between, where thought and action respond to each other" (Mintzberg et al., 1998, p.42). This practical and down to earth evaluation of the strategic process is aligned to the strong practical roots of many of the research participants (often in volunteering). Participants also confirmed the element of intelligent opportunism (Liedtka, 1998) present in their strategic decisions, which requires, as Mintzberg (1987b) puts it, "peripheral vision":

"Craftsmen have to train themselves to see, to pick up things that other people miss. The same holds true for managers of strategy. It is those with a kind of peripheral vision who are best able to detect and take advantage of events as they unfold" (Mintzberg, 1987b, p.18).

Participants' practical discussions of what they actually *did* often saw strategy as having many forms; sometimes a pattern, position, perspective, a stream of actions, or a ploy rather than plan (Mintzberg 1987a), one that is "about synthesis [*and*] involves intuition and creativity" (Mintzberg, 1994, p.108) and is a result of consistency in behavior, "a fluid process of learning through which creative strategies evolve" (Mintzberg, 1987b, p.66) and a matter of commitment (Mintzberg 1987b) and mindset. All of these

components were common in participant descriptions of the strategic decision-making process. Perhaps, the academic nature of the research study sometimes made participants uneasy with classifying these elements of their decision-making processes as 'strategic' or made them assume something was lacking in their approach; "we're not strategic, I don't think..." (interview 27). However, some did open up a broader, wider perspective of strategy:

"So very concrete changes like paradigm shifts ... [*require*] time out from the world, where you just have a chance to just be in nature and to think, or not think even, and decide what you're next going to do in life ... The most creative, useful ideas I've ever had have been when I'm *not* thinking about them ... you can think yourself into a corner on something but when you stop thinking about it, the answer usually comes ... taking time out from the world and taking time out from the everyday ... that's when they have these 'eureka' moments ... stop thinking about it ... and then the answer will come" (interview 35).

The strategic decision-making processes within participating organizations were fluid and tended to extend beyond the boundaries of the organization, for example, consultative processes that reached into communities of interest or external networks (Granovetter, 2005; theme 7, section 4.9). These processes were complex, continuous and intertwined (Bonn, 2005) and founded on a shared a sense of aligned purpose. This reflected the participants strong practical orientation and a bias towards action, which is reflected in the work of Mintzberg et al. (1998), Bonn (2005) and the praxis literature (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman 2015):

"Strategic thinking is closely associated with acting in an ongoing and intertwined process. As Mintzberg *et al.* (1998, p.42) have argued 'there are times when thought should precede action, and guide it ... Other times, however, especially during or immediately after major unexpected shifts in the environment, thought must be so bound up with action that 'learning' becomes a better notion than 'designing' for what has to happen" (Bonn, 2005, p.337-338).

In contrast, Porter's analytical view of strategic thinking as an analytical discipline (Porter, 1991, 1996; Porter and Kramer, 2006, 2011) was reflected in the participants' recognition of the importance of an effective and often more formal, strategic planning system, particularly in the larger participant organizations. It was not a question of either/or but a recognition that *both* processes were critical in different ways. Indeed, the equivalency of strategic thinking within participant organizations (rarely labelled as such) was not separate but often embedded alongside and within the more formalised strategic processes, including the governance and strategic planning processes. Most importantly, it was linked to the strongly relational nature of participant organizations as purpose driven and the need to run parallel processes that reflect the different perspectives and worldviews of key stakeholders (research question 2, section 4.8).

Although participants never mentioned Mintzberg by name, they discussed many of his ideas in their own words; the importance of a fluid, emergent, intuitive approach to strategy, of commitment in particular, the complex nature of the process, the relationship between strategy and context (strategic planning is essential in some areas) and the sense of patterns and streams of interrelated activities (Mintzberg, 1987a, 1987b, 1994; Mintzberg et al., 1998) that somehow come together when married to deep commitment.

4.5.7 Relationship with strategic planning

Participants equated strategic thinking (or its equivalency) as a way of thinking, one that allowed them to make better, more measured, more holistic decisions about the fundamentals, what the organization is all about (section 4.5.5). Strategic or business planning, on the other hand, was seen as a necessary tool to operationalize strategy, ensure the effective use of resources and prioritise objectives. Although the integration of strategic planning and strategic thinking in participant organizations was complex, informal and embedded (and participants did not always name strategic thinking directly) the two, largely parallel, processes were significantly different in scope, loosely integrated and participants acknowledged that both were critical to long-term survival and to achieve organizational purpose (research question 2, section 4.8).

This is aligned to the literature that suggests that strategic thinking and strategic planning are not only different in scope, “distinct, but interrelated and complementary thought processes” (Heracleous, 1998, p.482) but involve different ways of thinking. Strategic thinking is “synthetic, creative and divergent” (Heracleous, 1998, p.485) and “conceptual, systems-oriented, directional, and opportunistic” (Goldman and Casey, 2010, p.120). Strategic planning is an “analytical thought process” (Heracleous, 1998, p.481), one that is “logical, systematic, conventional, prescriptive and convergent” (Graetz, 2002, p.457). Both play a critical role in organizational success (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002).

The strategic processes of participant organizations have emerged over time in response to the need to secure long term sustainability and meet their core purpose. This requires them to meet the different, and sometimes opposing, needs, perspectives and worldviews of multiple stakeholders. Both strategic thinking and strategic planning play a key role in enabling them to do so. The complex, interrelated nature of the strategic process allows them to attract funding from, and communicate with, both their extended communities of interest (membership and legacy income) and the wider world (project-based income and grants), which they do by communicating using different languages with different stakeholders (research question 2 section 4.8).

The strategic planning process (particularly in the larger participating organizations) includes a stronger analytical, cognitive and evidence-based dimension (Heracleous, 1998; Porter 1996; Porter and Kramer, 2006, 2011), which is important in the clarification and prioritization of objectives and detailed financial processes (budgeting, tender processes and so on) in participating organizations. It also plays an essential role in the operationalization of strategies (Heracleous, 1998) and effective resource allocation, as well as enabling participant organizations to communicate effectively with policy makers and resource holders. Participants saw this as an essential element of organizational effectiveness, financial stability and effective communication, recognising the competitive dimension of obtaining funding and maintaining financial sustainability and developing the ability to influence policy makers. The way in which participant organizations do this in practice is explored in research question 2, section 4.8.

This ability to couple different organizational perspectives (the analytical business perspective and the social purpose perspective) resonates with the literature on institutionalism (the influence of different types of logic that shape an organization’s social and cultural context). Ray and Ricart (2019) look at the

role that organizational purpose plays in bringing together analytical, business and institutional logics and the different ways of thinking (reasoning) that underlie them (Ray and Ricart, 2019):

“Purpose acts as a source of legitimacy, guiding strategy by the primary principle of acting according to ‘who you are.’ This can be promoted by practices such as institutional framing (missions, values, principles) or stakeholder management, where a company preserves purpose through the evolution and reconfiguration of its institutional environment” (Rey and Ricart, 2019, p.50).

Interestingly, although most participants accepted the benefits of strategic planning there was a strong undercurrent of opinion that railed against its perceived rigidities and inappropriate quantification of nature’s benefits, perhaps because the participants felt that it was not aligned to the urgency, complexity and “wicked” nature of the environment challenges (characterised as deeper, persistent and insoluble problems that not easily reversed, which offer no clear alternative solutions) that participant organizations were set up to help to resolve (Frame, 2008, p.1113).

4.5.8 Resolution of conflicts and tensions

The embedded, and largely informal, strategic thinking process in participant organizations operates alongside, and sometimes within, a parallel strategic planning process. These loosely integrated processes emphasize different aspects of the value of the natural world (intrinsic value to ‘insiders’ and extrinsic value to ‘outsiders’). Larger participant organizations tended to have more formal processes, which were often integrated with the governance process and/or broad consultative processes involving key stakeholders. In smaller organizations these processes are found in informal meetings and get-togethers, often led by founders or small teams.

Participant organizations need *both* strategic thinking and strategic planning processes to be sustainable and to meet their core purpose. As a result, they have developed the ability to *hold*, as well as *revolve*, tensions that arise (both internally and externally) when the underlying needs, perspectives and worldviews of key stakeholders’ clash (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010; BAM, 2018, 2019), which contributes to their ability to leverage their limited resources (research question 2, section 4.8).

The literature in this area is specialised and focused on the ability of organizations to integrate different types of thinking and approaches within the decision-making process as a whole. Institutional theory provides examples of how organizations are influenced by, and incorporate multiple perspectives or logics; analytical, business and institutional, which may incorporate social and cultural influences as well as social welfare and environmental logics (Rey and Ricart, 2019). This is necessary to “perceive and integrate diverse and conflicting perspectives appearing inside and outside of the decision-maker” (Pircher, 2016, p.64) and to understand “how organizations can survive and thrive when embedded in pluralistic institutional environments” (Pache and Santos, 2013, p.972). In short, the organizations are able to reconcile (Dahlmann and Grosvold, 2017) or bridge (Pache and Santos, 2013) the tensions between competing institutional logics:

“Instead of adopting strategies of decoupling or compromising, as the literature typically suggests, these organizations [*social enterprises*] selectively coupled intact elements prescribed by each logic. This strategy allowed them to project legitimacy to external stakeholders without having to engage in costly deceptions or negotiations” (Pache and Santos, 2013, p.972, researcher italics).

Rey and Ricart (2019) call this process of reconciling or bridging different perspectives “institutional coupling” and link it directly to organizational purpose, thus providing a description of the process, which, strongly resonates with those of the research participants:

“Institutional coupling is related to the way organizations develop institutional principles and values with regard to organizational purpose. It offers companies the ability to both maintain equilibrium between the company and its stakeholders as well as provide organizational members a source of higher meaning and motivation ... purpose acts as a source of legitimacy guiding strategy by the primary principle of acting according to ‘who you are’ ... [and] preserves purpose through the evolution and reconfiguration of its institutional environment” (Rey and Ricart, 2019, p.50, italics in the original).

Praxis literature, which focuses on “micro-level processes and activities [*that*] have been less commonly evaluated” (Regnér, 2003, p.57), builds on Mintzberg’s work on the emergent properties of strategy and suggests that in certain contexts there is a role for multiple (and potentially contradictory) strategic processes within a single organization, for example, inductive and deductive strategic processes can co-exist together (Regnér, 2003) as can recursive and adaptive processes (Jarzabkowski, 2004). Regnér (2003) looked at four multinationals and found one organization had “a two-fold character of strategy creation” with multiple strategic approaches, inductive at the periphery and deductive and analytical at the centre, which he described as “two completely different worlds.” The tensions that arose were resolved in practice, sometimes through “everyday activities” (Regnér, 2003, p.75).

This is significant, despite the different organizational contexts, as the equivalent informal practices within participating organizations were also everyday activities, for example, as part of the overall governance and related processes. In addition, a clearly understood sense of purpose plays a role in enabling organizations to balance the interests of different stakeholders (which the British Academy of Management, ‘BAM’, defines as all those groups or individuals who affect, or are affected by, the organization achieving its objectives; BAM, 2019, p.17). As purpose driven organizations this is particularly important in the case of participating organizations.

The governance process plays a key role in participant organizations (Drucker, 1989; BoardSource, 2005; Low, 2006; Hurth, 2017), including overseeing executive management, a custodial role in terms of organizational purpose, mission and vision, and the process of resolving and holding conflicts and tensions that arise as a result of meeting the different needs, perspectives and worldviews of multiple stakeholders. A strong sense of environmental stewardship, reinforced by strong network ties within extended communities of interest, creates strong bonds of trust within participating organizations, which often lead to a servant leadership governance model (Heuer, 2012), which is often described by participants as a custodial trustee role. Trustees were almost always in a central position within the strategic decision-making process despite differences in approach between participating organizations.

Trustees were inevitably described by participants as supporting the executive team with the core purpose and values of the organization centre of mind. They tended to focus on what they perceived mattered most in the organizations, which included the organizational mission, vision and values, strategic thinking and organizational direction (BoardSource, 2005). However, the precise nature and form of the relationship between the executive and non-executive teams was complex, variable (both between organizations and over time) and depended on the personalities involved and the organizational culture of the organizations. Hence, there was a diversity of relationships and principles, some borrowed from for-profit organizations to improve organizational effectiveness (Viader and Espina, 2014) and others based on a deep and abiding love, experience and knowledge of the natural world. Nevertheless, the relationship between the executive and non-executive teams, no matter what its precise form and orientation, was a key factor within the strategic processes of almost all participating organizations.

This understanding is complemented by a concept from the psychology literature in relation to the flexibility of leadership, which looks more closely at the process of *holding* tensions that arise from supporting contradictory perspectives (Kaiser and Overfield, 2010). The authors trace the concept of integrating opposing forces back to the wisdom traditions of both the East and West and explore the contribution of the concept to modern management science, in particular, leadership models. Whilst this research relates to a different context and academic field, it provides a useful way of conceptualising the underling process that participant organizations have developed in order to hold and integrate opposite perspectives and worldviews and thus meet the different needs of multiple shareholders:

“The mastery of opposites approach is consistent with ... flexible leadership in that it concerns the ability to respond appropriately to the different demands brought on by changing conditions ... The opposites approach identifies a specific repertoire of opposing but complementary behaviors that are appropriate to a range of conditions” (Kaiser and Overfield, 2010, p.109).

Interestingly, this area also incorporates the shadow side of the culture of participant organizations (Egan, 2012) (theme 9, section 4.7), which, by its nature, may not be visible, particularly to outsiders. This suggests that part of the strategic thinking process, including difficult matters such as tackling issues where conflicts arise, is conducted behind closed doors and is not immediately visible. As a result, the data in this area should be treated with caution.

4.5.9 Importance of praxis: Strategy-as-practice

The strategic processes in participant organizations are complex and contextual and the subtle nuances of the precise nature of the dynamic between the key strategic processes can helpfully be viewed through the lens of praxis. One of the key strengths of an inductive, qualitative research methodology is that it provides an opportunity to observe what participants actually *do* within the participating organizations, to take what practitioners do and say very seriously (Whittington, 1996). This acknowledges the lack of recognition of the importance of praxis in the field, addresses its perceived absence (Goldman, Scott and Follman, 2015) and examines its lack of visibility compared with strategic planning (Benito-Ostolaza and Sanchis-Llopis, 2013). For this reason, data analysis is structured to include a detailed analysis of the nine key themes (sections 4.6, 4.7, 4.9, 4.10 and 4.12 to 4.16), each of which has its own narrative and value in that right.

When the research participants described how they made strategic decisions in practice they often struggled to understand the strategic terminology and many (particularly the smaller organizations) found aspects of the strategic process complex and mystifying. There was a common perception that strategy was analytical in nature but this did not necessarily marry up with the *full* way in which the participants *actually made* strategic decisions. They spoke readily about more embodied forms of decision-making (although they never used this term), particularly the use of intuitive, emotional and spiritual (a sense of inner knowing) sensibilities (themes 2 and 3, sections 4.13 and 4.14). They also used practical experience as a guide. There was a strong element of practice, which was part of, and ran alongside, a more relational approach (research question 3, section 4.11).

As a result, most of the participants rarely mentioned business theory. They talked about what they actually did and this often reflected a practical background grounded in science (particularly ecology), care for the natural world (conservation and restoration), care for people (particularly the marginalized and disempowered) and volunteering (themes 4 and 5, sections 4.15 and 4.16). Participants often explicitly referred to themselves as practical, a comment that permeates through the research data (theme 2, sections 4.13.3, 4.13.5 and 4.13.10; theme 3, sections 4.14.6 and 4.14.10; theme 5, sections 4.16, 4.16.1, 4.16.8 and 4.16.9). There was a strong element of practicality accompanying their passion, commitment and vision for the natural world.

The strategic processes within participant organizations have emerged within this specific context as a *practical and effective* response to their desire to fulfil their core purpose. Participants readily accepted the need for both strategic planning and strategic thinking by referring to the underlying purpose of the two different thinking modalities (Mintzberg, 1994, Heracleous, 1998). They rarely named strategic thinking as such, instead referring to the set of processes that enables the organization to make sure that what it is doing (at both strategic *and* operational level) is aligned to its core purpose and values. These were referenced to guiding or 'first' principles, 'fundamentals', core values (often referred to as our 'ethos') and organizational remit, which acted as a proxy for core purpose. As participant organizations are not-for-profit, with related governance processes, these informal processes are often situated in the interplay between the executive and non-executive teams and/or in the places where the different languages and ways of thinking underlying the strategic thinking and planning modalities take place and potentially clash (research question 2, section 4.8).

The research study is thus a very practical example of strategy in action, which ties it directly to the praxis literature (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015). The detailed themes that underlie the participants' analytical story (sections 4.6, 4.7, 4.9, 4.10 and 4.12 to 4.16) provide a wealth of detail on the ways in which participant organizations engage with the strategic process, including an ability to integrate different types of thinking and approaches within the decision-making process as a whole (Regnér, 2003; Jarzabkowski, 2004) and the complementary nature of these activities (Mintzberg, 1994; Heracleous, 1998). Many of the insights and much of the value of the research study is at this detailed practical level.

Many of the larger participant organizations, for example, invite representatives of their extended communities into the broader strategic process in a consultative capacity to reflect a wider community view (theme 7, section 4.9). This process often has a formal structure to it. Smaller organizations do the same thing but it is normally informal and involves the founder and/or small team reaching out to those within their community that they trust. These processes help to ensure that the organizations keep to their core purpose, values, mission and vision when they make key strategic and/or operational decisions (those involving strategic direction and scope, organizational boundaries, ethical position, collaborative working arrangements such as partnership or project work, accessing funding streams and so on). This increases the receptivity of organizations to a diversity of views, grounded in a shared sense of purpose, and provides an additional check on organizational decision-making in key areas. It also enables participating organizations (particularly the smaller ones) to access a broader pool of resources, contacts and knowledge.

There are no directly comparable research studies to this thesis, so the research data and findings cannot be compared directly to other findings in the field. In addition, there is a paucity of literature, both in strategic thinking in not-for-profit organizations (particularly small and medium-sized enterprises) and in the environmental sector as a whole (Kendall and Knapp, 1996; Clifford et al., 2013):

“One poorly understood field of activity is the environment. It is only relatively recently that the environment has become an area of systematic research across the traditional disciplines of social science and within third sector studies it remains a marginalized object of analysis” (Clifford et al., 2013, p.243).

As a result, the research study makes a valuable contribution to the praxis literature in the field, particularly in areas such as the nature of strategic thinking in the sector, its relationship with strategic planning, the impact of purpose driven organizations on strategic thinking and the role of governance and other key factors and insights. It helps to build a bridge between conceptual understanding and empirical observation. The participants’ analytical story suggests that whilst strategic thinking is not formally recognised or labelled as such, it is deeply embedded within the participants’ organizations at those points where key decisions need to be evaluated against core purpose and/or the expression of that core purpose in terms of mission, vision and underlying values. To do this participating organizations use proxies for core purpose, such as guiding or ‘first’ principles, or ‘fundamentals’, to ensure that they keep their organizations on track and navigate according to what is most important to them.

4.5.10 Strategic thinking as a holistic discipline

The strategic thinking process within participating organizations is complex. Whilst participants have a strong scientific and ecological perspective (theme 2, section 4.13) and they see their work and their underlying relationship with the natural world in holistic and interconnected terms, this does not, necessarily, imply that the strategic processes of participant organizations are more holistic as a result. These processes (including strategic thinking) are an emergent, practical response to pursuing what is most important to participants, expressed as core purpose and deeply held values, underpinned by their strong connection to the natural world. This connection is embodied (mind, heart, body and spirit) and holistic and influences the strategic process primarily indirectly through the purpose driven, relational

nature of the organizations (research question 3, section 4.11).

Participants certainly discussed the importance of a holistic dimension to strategic decision-making and recognised the importance of translating their holistic ecological worldview into practical outcomes in the real world. However, the way in which they achieve this in practice is complex. It has evolved to incorporate parallel, often informal, processes that enable participant organizations to meet the different needs, worldviews and perspectives of different stakeholders, which is necessary to maintain financial sustainability as well as achieve their core purpose (research question 2, section 4.8). The participants' strong connection with nature plays a key role in driving this process, sometimes directly, but more often indirectly through the relational nature of participant organizations (research question 3, section 4.11). Other factors also play a role in determining the nature of the strategic thinking process in participant organizations, including the human dynamics of management (leadership characteristics, issues of power, control and influence and so on).

In short, the holistic perspective of many participants combined with their more embodied thinking approach (research question 3, section 4.11) does influence the strategic thinking process, particularly when participants are in senior decision-making roles. However, the process is more complex than the original research aim and rationale envisaged (section 4.3.10). First and foremost, participants are passionate about what they do (themes 1 to 5, sections 4.12 to 4.16; research question 4, section 4.11), it means everything to them (theme 10, Appendix C) and the strategic processes that have *emerged* in response to this strong sense of purpose and deeply held values are intensely *practical*. This is the abiding nature of the participants' strategic processes even though they exist to pursue an organizational vision, mission and purpose that reflects an underlying holistic and interconnected mindset:

"The legacy, I really do feel is worthwhile ... we've planted over a million trees during my tenure, [I'm] just a custodian, that's all I am. And a million trees, many of them are oak and they will last for 300 years" (interview 18).

4.5.11 Strategic thinking: Definition

The initial working definition of strategic thinking does not fully capture the purpose driven nature of the participant organizations and it does not link a long-term sustainable position directly to organizational purpose. In addition, for the smaller organizations in particular, the process of strategic thinking is often informal rather than formal. Addressing these limitations an amended definition, within the context of participating organizations, might be:

'Strategic thinking is a *way of thinking*, all those activities, both formal and informal, that enable an organization to see a whole picture and integrate different aspects of that picture within its key decision-making processes in order to maintain a long-term sustainable position, combined with a capacity to act in order to achieve its core purpose'.

4.6 Theme 6: Strategic thinking

How do we manage our organization (1 of 3)? Strategic Thinking: We are purpose driven organizations; We steer through fundamentals

We have no interest in profit in and of itself. We are purpose driven organizations and we are driven by the 'fundamentals' that link us back to our purpose and strongly impact and inform our strategy and priorities to ensure we can meet our objectives.

This is the first of three themes relating to the strategic process in participating organizations. The participant data underlying this theme is broad and extensive. Themes 6 to 9 all relate to the broad strategic process of participating organizations and are deeply interconnected. As a result, this theme covers the primary areas of overlap. This avoids undue repetition and integrates the themes more fully.

4.6.1 Focus on participants' views

Capturing the participants' perspective is central to the inductive research methodology of the research study. This section focuses on how the research participants see their world and pays careful attention to the language that they adopt. The working definition of strategy (section 2.14) was kept as simple and as broad as possible. Similarly, the scope of the interviews is broad and the use of strategic terminology has been minimised (chapter 3, section 3.10.3). Emphasis has been placed on the broad decision-making processes within the participant organizations to discover precisely what participants actually *do* in practice, which provides the foundation of the data analysis, and this has then been evaluated in the light of the extant body of the literature. A priori knowledge thus informs but does not constrain the data analysis. It is the participant understanding of strategic thinking that is central.

This research participants did not use conventional strategic terminology consistently and their interpretation of strategic terms sometimes differs from commonly accepted business definitions (Appendix G) and between themselves. During the interviews participants offered differing interpretations of what strategy means, often placed an importance on expressions such as 'fundamentals', 'guiding' or 'first principles' as indicators of core purpose or mission, had differing definitions of mission and vision and, as a research group, had a tendency not to distinguish between aim(s) and objectives but to use the latter almost exclusively. Common definitions of these terms are included in Appendix G.

As a result, the researcher identified the core processes within participant organizations that provided an equivalency to strategic thinking, whether or not the participants identified them as such. This includes participant responses on key areas of the strategic process that are often closely linked with strategic thinking, including vision, mission, purpose, values and the clarification and prioritisation of key aim(s) and objectives. The implications on the broader strategic process, including strategic planning, are considered in more detail in section 4.6.8 and theme 8, section 4.10.

The participants' story is supported by participant quotations to convey the depth and richness of the data. There is a brief review of the theoretical context at the end of narrative summary (section 4.6.2), which is referenced to the main review of the literature in section 4.5. However, this is kept brief to avoid undue repetition and allow the participants' story to flow more effectively.

4.6.2 The narrative

Participant organizations are purpose driven not profit oriented (section 4.6.3). They are steered by fundamental, guiding or first principles, which act as a proxy for core purpose and the underlying, deeply held values (sections 4.6.4 to 4.6.7), including a strong connection to the natural world (section 4.6.5). These elements come together to form the strategic thinking process within the participating organizations, which runs parallel to, and is sometimes integrated within, the strategic planning process (section 4.6.8):

“Are we being consistent in how we communicate our values? ... we talk about beauty as much as evidence ... so it's about ... whenever people find their way into our shop or onto our property, or in a room having a conversation ... whoever you meet here or whoever you see, you get the same feeling or the same sense of purpose within the body and within the organization” (PW2, interview 37).

Although few participants talked about strategic thinking directly, those that did equated it with a *way of thinking* (Liedtka, 1998, Mintzberg, 1987a, 1994), one which allows the organization to focus on achieving its core purpose and staying true to its values. Strategic thinking is a broader, deeper way of thinking that enables the individual or the organization to make better, more informed, more holistic, strategic decisions (meaning big or important decisions) about the fundamentals, what the organization is all about:

“We have to think all the way down the line, not just the immediate” (interview 29).

“So we've recently gone to [*a potential partner*] and sat down with [*them*] ... and they said, ‘well, you're not really a wildlife charity are you, you're a people charity’. And that was quite interesting” (interview 21).

The consideration of fundamentals and/or guiding principles within participating organizations serves as a place of strategic reflection and the equivalency of a strategic thinking process. This happened at key points within the participating organizations, either within the overall strategic decision-making process (direction, scope and boundaries) or where longer-term strategy was translated into operational strategies and action. Participant organizations differed in how this was structured (formal or informal), where it was placed within the strategic process (which depended partly on the nature of the relationship between the executive and non-executive teams) and a host of other factors (organizational culture, management style, structure, size and so on). It was best recognised by its quality; a place where current decisions (strategic and sometimes operational) could be questioned and evaluated against a simple embodiment of the organization's purpose:

“The question is, how is it going to make a difference?” (interview 14).

“It's about people at the end of the day and it's about what people do with this world and to have our sustainable planet we [*need*] to care for it, look after it and take actions. And we're trying to make what difference we can here in terms of inspiring [*people with that*]” (interview 19).

“We're all encouraged, all members of staff, or even long-standing volunteers are encouraged to have an input, if they've got an idea to share it” (interview 32).

“We do have a strategy, that has been developed with inputs across the organization, calling from our staff as well as our volunteers and our members, to get inputs from them as to what we

should be doing or what they would like to see” (interview 28).

Participant organizations navigate strategically through these fundamental or guiding principles, which are closely linked to, or a proxy for, the organization’s core purpose and deeply held values and are embedded within the organization. They use these principles to engage with extended communities of interest (theme 7, section 4.9) and to underpin their financial viability, sustainability and operational effectiveness through strategic planning and financial systems (section 4.6.9; theme 8, section 4.10). These key elements represent the core strategic decision-making framework of the participant organizations. In addition, the participant organizations have learned to speak different languages to different stakeholders who hold very different perspectives and underlying worldviews (theme 1, section 4.12). In order to do this they have developed complex and largely informal processes to hold the tensions and conflicts that arise as a result (theme 9, section 4.7):

“There’s a whole narrative out there about this thing called ecosystem services and how much that’s worth to the economy and I can see why that’s been done, but I absolutely hate it ... I don’t believe that’s the answer ... that’s almost not the connection ... [*it’s*] making that connection [*that*] your life depends on it in ways that you can’t put money on it ... If we can’t get to that, it will always have a value and if something else is more valuable it will go, because the more valuable thing will ... happen. So, for me, I really hate that whole [*thing*]... and I know why it’s done, and I can see the sense of it in many ways, because you’re just trying to put numbers on things so that people who value numbers can value it. But, I doubt that that’s the connection that we really want” (PW4, interview 37).

This creates pivotal places within the organizations, notably within the relationship between the executive and non-executive functions and the integration of the strategic planning and strategic thinking processes, where these tensions and conflicts can be surfaced, addressed and either resolved or held. These reflective, yet active, spaces operate as a *lynchpin* within the organization, ensuring that it is on track (in relation to its core purpose, vision, mission and values), providing the equivalency of a more formal strategic thinking process, in which issues of long-term orientation and direction, sustainability, organizational scope and boundaries, can be addressed and debated (theme 9, section 4.7). In larger participant organizations these processes, particularly the strategic planning process, are more formal. In smaller organizations they are informal, consisting of meetings and get-togethers, often led by founders or small teams. In all cases, they were tightly bound by organizational purpose:

“Our remit, until we get told something differently by changing it, comes from our Memorandum and Articles, and I think we always have to go back to that” (interview 15).

The nature of strategic thinking within participant organizations was discussed within the theoretical context of the wider body of the literature in sections 4.5.3 to 4.5.11 (research question 1). It is summarised very briefly here to avoid undue repetition and is referenced to the more detailed discussion above. The purpose driven nature of participant organizations impacts significantly on the strategic processes that participants discussed in relation to strategic thinking, including core purpose (Ghoshal and Bartlett, 1993, 1997; Collins and Porras, 1996, 2005; Stead and Stead, 2000; BoardSource, 2005; Beng Geok, 2018; Thakor and Quinn, 2018; Rey, Bastons and Sotok, 2019), mission (Drucker 1989), vision (Senge, 1990; Bonn 2001, 2005; Moon, 2012) and shared values, beliefs and culture (Weeks, 2006; Schein, 2010; Goldman and Casey, 2010; Moon, 2012; Cardona, Rey and Craig, 2019) (section 4.5.4).

Participants see strategic thinking primarily as a *way of thinking* (Liedtka, 1998; Mintzberg, 1987a, 1994). They have a strong scientific and ecological perspective (theme 2, section 4.13) and they see their work and their underlying relationship with the natural world in holistic and interconnected terms (theme 4, section 4.15). This impacts strongly on their view of strategic thinking (section 4.5.5 and 4.5.10):

“To me, it means to understand that you're a part of it ... not separate from it ... that to have dominion over it is not necessarily the best thing for humankind. I think a lot of people have lost that or don't think we are part of it [*but*] I, having been trained as an ecologist, I see that connection ... It's partly to do with the feeling that people are superior over the Natural World. We can control it, we've demonstrated that we can control it, but then we [*are*] also starting to see places we can't control it [*speaks softly and quietly*] and disasters happen ... [*followed by silence*]” (interview 7).

“It's all about being part of the environment yourself and remembering, reminding, remember that you are” (interview 27).

Participants highlighted the need for *both* strategic planning and strategic thinking processes as both are critical to organizational success (research question 2, section 4.8). Thus strategic thinking is seen as related to the broader strategic processes (Porter, 1991; Mintzberg, 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012) and strategic thinking and planning are different but complementary processes (Mintzberg, 1994; Heracleous, 1998) (section 4.5.7). The underlying differences between the strategic thinking and planning modalities require participant organizations to *hold*, as well as revolve, tensions that arise when the underlying needs, perspectives and worldviews of key stakeholders' clash (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010; BAM, 2018, 2019). They incorporate multiple perspectives simultaneously through a process of institutional coupling (Pache and Santos, 2013; Pircher, 2016; Dahlmann and Grosvold, 2017; Rey and Ricart, 2019; section 4.5.8). This is key to their ability to leverage their limited resources (section 4.5.8) (research question 2, section 4.8):

“[*Survival means*] ‘revenue meets expenditure ... simple as that ... you can't live off capital, you've got to live off revenue’ (interview 18).

“[*Our*] charitable wing ... handles 7,000 kids a year [*and*] raises money ... in order to underwrite the cost of environmental education for local schools because that's a fundamentally loss-making activity ... plenty of people say, ‘Why the hell do you do that, it's loss-making’, because they can't see past the wealth creation element of business. ... I have a ... friend who has helped me in all sorts of ways and (s)he has said to me quite openly ... ‘I can completely understand why you run the [*main environmental business*], because presumably that's profitable, but why are you doing all this education stuff?’ (interview 12).

There is a strong emergent quality to the nature of the strategic processes within participant organizations, including strategic thinking (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), which reflects a process orientation based on accumulated practical experience and is closely aligned to Mintzberg's broader process view of strategy and strategic thinking (Mintzberg, 1987a, 1987b, 1994; Mintzberg et al., 1998) (section 4.5.6). Participants reach out to extended communities of interest, which share an aligned sense of purpose and/or deeply held, underlying values, resulting in an embedded external as well as internal dimension to the strategic process (Granovetter, 2005) (section 4.5.10). The strategic processes in participant organizations are complex and contextual and the subtle nuances of the precise nature of the dynamic between the key strategic processes can helpfully be

viewed through the lens of praxis (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015) (section 4.5.9).

Strategic thinking within the participant organizations is also deeply contextual. The central motivation of participant organizations is purpose not profit. They are relational and this drives their strategic processes (research question 3, section 4.11). The most important value that they share is to make a difference in the world in relation to their connection with the natural world (theme 5, section 4.16). Much of the strategy literature cited above is focused on commercial, profit-driven organizations and participants are strongly purpose driven and relational. This is a fundamental and important difference. For the participants, mission (or purpose) is everything (Drucker, 1989) (theme 10, Appendix C):

“A deep ecology perspective ... following my heart and allowing more of what I deeply care about to come alive in my work ... that is where I find my happiness ... because I can be myself” (interview 11).

4.6.3 Purpose driven organizations

There are important differences between the strategic process in participant organizations (primarily charities and other not-for-profit structures) and commercial organizations. Commercial organizations are driven by profit, which will drive changes to the businesses they choose to be in. Small and medium-sized environmental organizations are formed with a particular purpose in mind and will adapt their endeavours to suit changing external circumstances as required within the parameters of their core purpose. The core purpose is stable and changes only in exceptional circumstances (for example, the extinction of an animal that is the sole focus of the organization), although changes in scope and organizational boundaries are more common. The strategic thinking process operates within these strong influences.

Many participants referred to their organizations being driven by core purpose, which strongly impacts upon and informs organizational strategy and priorities. Funding is important to survival but it is only a means to an end, the achievement of the purpose of the organization, not the *raison d'être*. Participants were primarily motivated by a desire to make a difference in the world (theme 5, section 4.16). They showed no interest in profit, in and of itself:

“I was looking for something where it wasn't the bottom line that was driving everything ... [*those*] decisions that aren't necessarily what I would call doing the right thing” (interview 28).

Nevertheless, most participants were acutely aware of the importance of strategic planning and operational effectiveness in determining financial viability and sustainability (theme 8, section 4.10). Effective strategic and business planning were seen as necessary enablers to achieve core purpose:

“I've never been interested in making money per se. I recognise that making money is an essential part of being in business, and particularly in a business like this, because every few years you have to renew 'stuff', whether it's vehicles, whether it's buildings, whether it's equipment, computers, whatever else and so, making sufficient profits to be able to recapitalize ... with expensive equipment is an essential element of being in business ... a business has got to wipe its face and it's got to make sufficient profits for its own existence. What it *doesn't* have to do is to amass capital and it's amassing capital that has never been of any interest to me at all ...

I don't run my businesses to get rich, I run my businesses to make them work, and there's a fundamental philosophical difference there' [*Why run these businesses?*] ... 'I am a naturalist, I know what's going on out there' " (interview 12).

Participants regarded core purpose as unchanging and also had a clear idea of their mission and vision (standard definitions in Appendix G), either through formal written statements or informally. Within such strongly focused purpose driven organizations many key strategic questions, for example, 'what business are we in?' and 'what is the long term direction of the organization?' are closely linked to this core sense of purpose, which is closely aligned with both vision and mission (whether formal or informal, written or unwritten) and the organizations' aim(s) and objectives (which in larger participant organizations, were part of the strategic planning process).

The day-to-day distillation of this core purpose (often referred to as 'fundamentals', 'first' or 'guiding principles') plays a key role in steering participant organizations by providing a reflective space to consider significant strategic changes in the light of their core purpose, mission and vision. In some cases, this was used in a formal context, incorporated into the strategic process or referring to company documents such as the Memorandum and Articles of Association (interviews 14, 15) but often it was used informally, almost as a mental purpose-based algorithm.

Core purpose also plays a role in defining and prioritising the aim(s) and objectives, which are then incorporated into the strategic process to ensure that *all* the organization's activities (strategic and operational) contribute towards achieving its core purpose. In other words, these 'fundamentals' link the big picture (purpose, vision and mission, which are aspirational and theoretical) to practical implementation through the various stages of the strategic process. Participants summarized how critical this was in linking the strategic process from the top to the bottom of their organizations, both upwards to core purpose, mission and vision and downwards to the strategic process and operational implementation:

"Bringing it all together ... this is why we are doing that, that's why it ties in" (interview 23).

"Thinking back to what the priorities [*are*] and [*how can*] we contribute, [*how*] can we achieve the outcomes" (interview 28).

"It's been [*a major strategic acquisition*] part of our DNA for a very long time, knowing this place was there and needed, probably, long term security" (interview 7).

Core principles were sometimes held so strongly that day-to-day decision making was guided step by step. Both purpose, and the proxies used for it, don't normally change. However, the *interpretation* of purpose (vision and mission) may change in line with underlying values, impacting the long term strategic direction of the organization (scope, boundaries and so on) and some of the participants were engaged in these change processes. These provided a good example of how strategic thinking operated in practice. One participant organization was changing the long-term balance of its activities between supporting the natural world directly through its nature reserves and working with people using the potential of the natural world to transform their lives (theme 4, section 4.15). Although these changes did not change core organizational purpose and values, the changes to the scope of the organizational remit were significant:

“There’s been a gradual swing, I would say it’s probably almost 50:50 at the moment ... [*towards*] the more community engagement, people engagement, with a particular focus in the last four or five years on wellbeing, both of adults and increasingly ... of young people under 25. And in using nature ... as a medium for delivering personal development and emotional literacy” (participant 26).

One of the key features of participant organizations is that they run two loosely integrated but distinct strategic processes in parallel, one driven by the ‘fundamentals’ (in essence, the distillation of core purpose in practical terms), which incorporates many of the dimensions of strategic thinking (section 4.6.6) and a second one focusing on the formal strategic and financial planning system that links overall aim(s) and objectives to detailed strategic and financial planning systems and operational implementation (theme 8, section 4.10). Both of these parallel strategic processes are critical for participant organizations to achieve their purpose (mission, vision and core objectives), both in resource and financial terms. Each one is key to financial viability and sustainability and they are underpinned by the need of the organizations to speak different languages to different sets of stakeholders (section 4.6.8; theme 1, section 4.12).

The strong purpose driven nature of participant organizations is expressed both internally (theme 5, section 4.16) and externally (theme 7, section 4.9) by reaching out to extended communities of interest, those that are aligned to their core purpose and/or share their deeper values (themes 2, section 4.13) cemented by a diverse but shared experience of connecting with nature, which binds them together (theme 3, section 4.14). Thus, participants achieve their mission through a process of engaging others in ever increasing circles, with the aim of making a difference in the world, both individually and collectively through collaborative endeavour (theme 5, section 4.16). Accordingly, there is a clear link between individual contribution and the big picture; organizational purpose, mission and vision. Even at lower levels within the organization this link is surprisingly direct and clear:

“If you imagine a triangle, a pyramid, you’ve got the person at the top, and you’ve got everybody else coming down, ... information can flow well downwards, but it’s also flowing well back upwards again. And, you’ve got that level of passion and experience and skills all the way up, you’ve got the guy at the top with the vision, and him passing it down to the others below him, and I know that in my case it’s worked really well. I know what [*the CEO’s*] vision is because he’s told me, and then I can go off and start carrying out my bit of his vision. ... I think it works really well. When I was in Engineering [*my previous job*], here’s my little bit down here [*illustrating by knocking the bottom of the table*], all this stuff up here, I haven’t got a clue what’s going on up there, no one ever told me and I never felt part of that but here it’s different” (interview 25, researcher italics).

This collective purpose driven endeavour of participant organizations is underpinned by an effective strategic and business planning system (section 4.6.8; theme 8, section 4.10) and complex processes by which participant organizations hold (and resolve where possible) conflicts and tensions that occur between the different strategic processes, which arise from meeting the different needs of multiple stakeholders (theme 9, section 4.9). The importance of core purpose mission and vision was discussed widely by participants (for example, interviews 7, 10, 11, 15, 18, 30, 33, 35).

4.6.4 Purpose, mission, vision and values

The organizational purpose, vision and mission of participating organizations were most often long term, for example, a 250-year vision (interview 11), a 200-year ecological vision (interview 10) and “a long term, very long-term vision” (interview 18). These do not generally change unless under very exceptional circumstances. The use of ‘fundamentals’, or guiding principles, are an *interpretation* of these core principles (often within a specific context) and this interpretation may need to be revisited and change. For participants, these unchanging elements that characterise the organization provide the rudder (purpose and mission) and aspirational picture (vision) to galvanise the organization into action from the top to the bottom (for example, interviews 15, 18, 35). One participant used a quote from singer-songwriter, Billy Bragg, to illustrate the collective nature of the organization:

“I’m the songwriter. It’s the job of the audience to change the world” (interview 35, quoting Billy Bragg, the singer-songwriter).

For the participants, the importance of a clear vision was connected directly with the practical experience of being connected with nature. Participants often took a holistic approach by linking a sense of overriding purpose with practical, iterative steps. This provides a clear sense of direction that enables them not to get side-tracked, to keep their eyes on the prize (the central purpose of the organization). Making a difference is the cumulation of all the little steps along the way to fulfil a common cause:

“I will do, make one step, then, if one step is going easily, I think this is a going [*thing, I will do it*] right away. If [*not*] discard, oh, I shouldn’t do that” (DW1, group interview 34, native Japanese speaker).

“That is what success is, but there are all those little steps on the way that are getting you towards that ... for us that’s success. Just those smaller steps ... we went out to do that and we did it” (interview 28).

It is interesting to note the strong and decisive words used in interview 34 above; “right away”, “discard” and “shouldn’t”. This is the strong moral and ethical imperative that is linked to the participants’ sense of purpose, which is itself linked back to a strong connection with the natural world (theme 1, section 4.12). Sometimes, staying on track requires decisive action:

“I think you’ve got to be bold to go in a direction that you want to go in as well, and not be dragged off by what other’s think. I find myself saying an awful lot, just because that’s what the funder says they’ll give us money for doesn’t mean that’s what you should do. And, it’s a very difficult decision to make sometimes, to not go to a funder that you have historically gone to when you need funds. But actually if that’s not what your vision and mission is, you have to be true to yourself” (PW6, group interview 37).

The larger participants tended to have more formal strategic processes, including planning processes (section 4.6.8), which could also be long term; ten year plans (interview 30) and ten to fifteen year plans (BW8, group interview 33). This allowed them to change key priorities within their overall purpose, vision and mission using a similar reflective process but, in this case, one that reached out into extended communities of interest (theme 7, section 4.9).

Participants often emphasised the fundamental importance of values in decision-making, sometimes emphasising the importance of the ethos of the organization (meaning its spirit, culture and values, theme 5, section 4.15) and linking this back to an underlying sense of connection with the natural world.

Guiding principles ('fundamentals') were linked closely to core purpose, allowing underpinning values to guide the day-to-day decision-making process, either formally or informally, even when there was a significant degree of opportunism within the context in which those decisions are made. Despite a greater degree of risk, opportunistic decision-making arising from fortuitous circumstances is still possible provided that it fits the values and, by implication, the core purpose of the organization:

"I would feel that we're always opportunity choosing as well ... opportunities come along, you say 'shall we go for that one or should we not?' And yet, we've got quite clear values, we've got quite clear mission ... and we've been around for a while and so, I think we understand broadly what our members want us to do, but it's often resource-limited ... or how risky is that option, whether it's reputationally, or just, you might fall flat on your face because you've run out of resources or whatever it is. It's all those things are still influencing how you make decisions" (BW5, group interview 33).

When participants spoke of opportunity they are being very specific. It was an opportunity to achieve their core purpose, aim(s) and objectives. The example below demonstrates organizational flexibility in changing priorities in response to a specific environmental threat, linking the resulting action to the organization's mission and to a moral imperative ('it's the right thing to do') as well as ensuring that the organization's funds are used most effectively:

"So it's doing the right thing when we invest those funds. And, in terms of [*the species we support*] we have identified the fact that in Southern Africa the biggest threat ... is poisoning ... as a casualty of the poaching that's going on ... we're not going to solve poaching, but what we can do is we can train and equip field workers with poison response kits ... so we're diverting some of our funds and our resources towards that specific thing" (interview 28).

4.6.5 Underlying connection to nature

The purpose, mission, vision and values of participating organizations were underpinned by a strongly felt connection to nature, applied in a specific context, based on a diverse but shared experience of connection (themes 1 to 3, sections 4.12 to 4.14), which creates shared values and a common, aligned sense of purpose, both internally and externally (themes 4 and 5, sections 4.15 and 4.16) enabling the organizations to reach out to extended communities of interest (circles of identity) and engage others (theme 7, section 4.9) in order to make a difference in their field of endeavour. This connection to the natural world is fundamental:

"[*A connection with nature*] should affect everything ... it's why we're here, so it's important that anybody that's joining the organization, whether it's a trustee or a member of staff or a volunteer, fully understands what we are trying to achieve as a charity, and gets it, and is enthusiastic so that any of our staff starting will get an induction that takes them right round the whole Centre to understand what it's about. They get a letter from me. They'll also ... get a full understanding of what they're doing and how they fit within the organization ... to make that link [*that*] our Education Officer, taking kids out on rock pooling on the beach, is dependent on the waitress in the café clearing tables and washing dishes, so that there's a link and one's dependent on the other, there's a mutual dependency" (interview 19).

Participants shared a strong ecological, scientific perspective, seeing the world as inherently interconnected, where the whole is more than the sum of its parts and includes human beings, who are, therefore, not separate from it. This holistic, ecological perspective is less self-referential (humans as the central point of reference and meaning attributed from a human-based or anthropological perspective)

and more focused on the bigger picture. In other words, the reference point becomes the whole itself, which may then be interpreted from the personal experience, sensibilities and belief systems of the participant him- or herself. This moves the perspective from a cognitive, analytical framework to a more embodied sense of knowing (sections 4.13.4 to 4.13.6). This impacts on the participants views of the value of nature (embodying intrinsic value as well as extrinsic value) and the way in which they viewed strategic thinking (the importance of a holistic component):

“To try and see it for what it is, to appreciate that they are all parts of a whole, not just the geology ...but its relationship to the whole natural world ... an holistic, planetary approach ... one depends on the other very, very, very much” (interview 13).

Participants talked of the importance of noncognitive non-thinking elements in decision-making including using more embodied elements of knowing, the combination of head, heart, body and spirit (themes 2 to 3, sections 4.13 to 4.14). One participant, for example, relied on a more intuitive, connected sense of knowing, which allowed him to feel, in a stewardship role, what the landscape around him wanted and needed (interview 18, section 4.13.6) and another described a similar sense of deep knowing (interview 11, theme 2, section 4.13.6). This more embodied sense of decision-making is closely connected to a broader sense of connection to the natural world (themes 2 to 3, sections 4.13 to 4.14) and often contains a strong practical, physical connectivity that comes with working closely with nature (theme 5, section 4.16.8) as well as the more relational, affective, intuitive and spiritual aspects (theme 2, section 4.13) (research question 3, section 4.11).

4.6.6 Steering by fundamentals

Participants steer their organizations by reference to ‘fundamentals’, which ensure that they remain focused on what is most important to them. They have incorporated a series of checks and balances into their strategic processes, embedded both formally and informally within the organization, which link directly back to their core purpose and/or mission and vision. They refer to these in many ways; ‘fundamentals’, ‘first’ or guiding principles, colloquial expressions such as ‘what we’re all about’ and in discussions about organizational values, ethos, and remit (common definition of terms, Appendix G). In all cases they are used as a proxy for the core purpose of the organization, often in relation to the appropriate boundaries around the activities and tasks undertaken by it.

These processes provide an equivalency to a more formal strategic thinking process, including issues around long-term strategic direction, scope and boundaries, the creation of a sustainable position best suited to achieving organizational purpose and an understanding of how that purpose, mission and vision is *interpreted* within the current environment. The critical difference is that participating organizations are more tightly bounded by their nature as strongly purpose driven organizations and these core characteristics (purpose, vision, mission and shared values) generally, do not change. So, most often ‘fundamentals’ are used as a way of keeping the organization on track; a way to steer or navigate them through difficult territory or challenging decisions:

“We’ve been fortunate, I think, looking back now forty five years, that the decisions we took, and they were very difficult decisions, [*and*] they continue to be difficult decisions because ... there

never will be a time when there aren't difficult decisions because you've got to keep moving on all the time with changing society, changing trends and changing this, but the decisions we've taken I don't regret at all. And, would I take them all again? Well, if I was trying to have an easy life, no, but that's not the job. No, the job is actually to try and find a way of protecting this place for future generations. It's as simple as that" (interview 18).

The consideration of fundamentals and guiding principles at key points within the strategic processes of the participating organizations serves as a place of reflection, for *both* strategic and operational decisions; a place where current decisions can be questioned and evaluated against a simple embodiment of the organization's purpose. This reflective space thus operates as a *lynchpin* within the organization; a place that fulfils a vital role, literally a pin that passes through the end of an axle to keep a wheel in position, in other words, one that keeps the organization on track but is also flexible and dynamic.

It is in this sense that participants referred to strategic thinking as a *way of thinking*, looking at things from a deeper level or a broader perspective, a way of ensuring that decisions are aligned with the core values or purpose of the organization and are not diluted by inappropriate trade-offs. For participant organizations this means making 'better', more measured or more holistic decisions, those that are longer term in nature, more effective and strategic, made with an awareness of the bigger picture, honed by their ecological and scientific understanding. All of this is incapsulated in the term 'fundamentals', a base, a foundation from which everything else develops, something more important than the day-to-day decision-making, one that is guided by policies (guiding or first principles) that may be incorporated into the organization's strategic decision-making processes. This can be applied to key strategic decisions, to prioritise organizational objectives or to 'run the rule' over operational projects to make sure they link back to core values and purpose:

"We had to think about [*this issue*] from first principles. So what are the principles on which the [*organization*] is founded? What are its key purposes? You can look at those ... and what specific documents might be consulted? ... what does the Memorandum [*of Association*] say? ... some of it is not written down anywhere ... [*one of my roles is*] to draw in that experience from within the current teams and actually going in and seeing people who've been part of it before, even those who are critical, because their perspectives are useful. ... for me ... the [*strategy*] document [*is*] an opportunity ... not to diverge significantly but ... to say what are the priorities, how will we do this in the next three to five-year period" (interview 14).

The division of responsibility for strategic decision-making between the executive team and non-executive team (trustees) differs significantly between participants (themes 8 and 9, sections 4.10 and 4.7). Strategic thinking, or an equivalency thereof, is most likely to be found in the areas that are most closely associated with the long-term direction and scope of the organization or arise through an interplay between the executive and non-executive functions (theme 9, section 4.7).

Strategic thinking is a reflective process, which addresses the 'big' questions of long-term strategic direction, scope and boundaries of an organization, which needs to be revisited regularly and can and does change depending on context, resources and changes in the external environment. The participants' data demonstrates that this thinking process is alive and well within the small and medium-sized participating organizations despite the fact that most participants do not name it as such.

4.6.7 A way of thinking

Participants frequently discussed strategic thinking as a way of thinking, one that was closely tied to core purpose, mission, vision and values, and rooted in the desire to make a difference in the world. This desire relates directly to the participants' strong connection with the natural world:

"If it wasn't for my ... connection to nature then I wouldn't be doing this ... the connection ... is really what drives us and what allows us to do it because not everything that we do has a price associated with it. Some of it does but not all of it" (interview 10).

There was also a sense in participant interviews of the need to lift their organizations out of the day-to-day complexity and, sometimes, chaos of organizational life and see a bigger picture, to bring the core purpose of the organization more consciously into the central frame of decision-making, to enable them to see the wood from the trees, adopt a longer-term perspective, prioritise projects and activities and adopt different perspectives, where appropriate, when facing complex decisions:

"We're in the middle of this process of saying, what [*projects*] do we keep, which [*ones*] ... meet our aims and objectives ... one of the troubles, challenges, I think, with strategic thinking is that we [*normally*] get three years [*on project funding*] ... you cannot be strategic ... [*If*] you want to be strategic, you need to be further ahead... we do a five-year plan ... and look ahead ... where we're going to go ... which I think is good. But we ... sometimes ... get waylaid by fashion, and, probably the wrong word, trend" (interview 21).

Although some participants stressed the importance of the effectiveness of strategic decision-making, the *quality* of the thinking process was also clearly important, partly because the 'big picture' was almost always present in their discussions; the sheer scale of the environmental crisis confronting us, the need to find genuinely new ways of meeting existing challenges and the perceived need to work smarter, better, more effectively and more collaboratively in order to make the profound difference that participants were seeking to make in their endeavours with limited resources. By creating a process that provided a reflective space to check in periodically against core purpose they ensured they were 'on beam', focused on appropriate priorities and yet were also able to maintain financial viability and sustainability over the long term:

"You get stuck in a groove of delivering what you've always delivered ... you need to take the time to think about, is there a better way of doing it, and dismantle and reassemble [*if*] to suit purpose and I think if you've got a good Board, who are capable of that level of strategic thinking, you are very lucky, if you've got a Board that can be encouraged in that direction, you are probably normal, because they are all part timers, in most cases, so you take them along. Then you've got to engage and listen to others, members, partners and so on, you've got to have a process of that [*kind of strategic*] thinking for my mind" (participant 14).

In addition to developing the ability to see and think differently, view decisions through different perspectives and link different elements of decision-making into a whole, some participants stressed personal attributes such as good judgement in strategic decision-making. Paradoxically, this often involved hard-edged, practical, grounded, experience; the world of ecology, practical science and conservation. Indeed, solid practical field experience was highly valued by participants, partly because it represents a physical representation of a connection to the natural world and partly because it is about getting things *done*, the ability to move ahead and demonstrate *tangible* progress towards visionary goals

and objectives:

“He’s thought through all the different aspects. He’s very much of a strategic thinker ... generally, his judgement is extremely sound” (interview 28).

“Throughout my career I have felt myself being bowled forward by great strategic thinkers, whether it’s Rachel Carson or Annie Dillard with *Pilgrim at Tinkers Creek* ... there’s a wonderful book you may not have discovered called *The Abstract Wild* by Jack Turner” (interview 12).

Not all the research participants talked about strategic thinking specifically but there was a consensus that it was important to create some form of reflective space where they consider and reflect upon important issues and challenges, whether this space was formal or informal. This space is part of the overall strategic process and it allows current decisions and strategy to be questioned and evaluated within the broader framework of what the organization is all about, what it stands for, and what its core values and purpose are.

The need for a reflective strategic thinking process was not confined to top-level decisions but was important throughout the organization and evident, to some extent, at many levels. It was most often referred to explicitly by participants within the context of prioritising options and making choices in the context of limited resources (for example, interviews 11, 27, 30). One of the larger participant organizations, for example, was undergoing a major strategic change, which was reflected at all levels of the organization (for example, interviews 21, 23, 25). However, it also occurs within the embedded processes where challenges, issues, tensions and conflicts are resolved or simply held (section 4.6.7; theme 9, section 4.7). These processes can be informal as well as formal and covert rather than overt as a result of the sometimes sensitive nature of the issues involved.

4.6.8 Strategic thinking and strategic planning

Participants recognised the critical value of effective strategic and financial planning systems, which underpinned their financial viability, sustainability and operational effectiveness and enabled them to achieve their core purpose. For the larger organizations the process was normally formalised as an annual strategic and budgeting process (theme 8, section 4.10). This process runs in parallel with the strategic thinking process, which is driven by the ‘fundamentals’ or guiding principles, the distillation of core purpose in practical terms. These processes are critical for environmental organizations to achieve their purpose (mission, vision and objectives), both in resource and financial terms and in achieving broader objectives such as influencing public policy, advocacy and areas such as direct action. Each one is key to financial viability and sustainability and they are underpinned by the need of the organizations to speak different languages to different sets of stakeholders (theme 1, section 4.12).

These languages mirror how different groups see the world (the different perspectives and belief systems that they hold about the world in which they live) and the way in which they relate specifically to the natural world. Participant organizations use a values-based language based on the inherent, intrinsic or innate value of nature within their extended communities of interest and a more cognitive, analytical evidenced-based language with the outside world (including funders and those in control of resources),

one which stresses extrinsic value and the benefits of nature for humankind (and in conservation work is backed by scientific evidence). In other words, they speak their own language amongst themselves ('insiders') but have learned to communicate with others in a language that the world understands ('outsiders'). Both are essential to their financial survival as well as the achievement of their core purpose (themes 1 and 2, sections 4.12 to 4.13; themes 7, 8 and 9 sections 4.9, 4.10, 4.7).

The intrinsic values-based language underpins the ability of participants to reach out to extended communities of interest (theme 7, section 4.9), those who share an aligned sense of purpose forged by an intimate but shared connection with nature (themes 1 to 5, sections 4.12 to 4.16) and provide the long-term commitment, funding and resources to meet shared objectives and core purpose. These 'stakeholders' include staff, trustees, members, volunteers, community support and others connected less formally with the organization, perhaps better represented by the visual image of a series of ripples moving outward across a body of water (a 'circle of identity', theme 1, section 4.12). It is these groups that provide long term financial stability and resource continuity and are the bedrock support for *long term* sustainability (members subscriptions, legacies and a commitment from volunteers and others to work for reduced, limited, or no financial reward) (theme 7, section 4.9).

At the same time, participants are able to engage with the wider world for supplemental funding (grants, project and other direct financial support, often tied to specific objectives) and to achieve policy-related objectives. This anchors *ongoing* day-to-day financial viability and stability and provides access to key decision-makers in critical policy areas. This supplemental funding is the day-to-day lifeblood of participant organizations and much of it is project- and objective-driven (theme 8, section 4.10).

These two parallel strategic processes and funding streams are particularly important in ensuring viable and sustainable cash flow and funding. Small and medium-sized environmental organizations tend to have low reserves and are thus vulnerable to changes in funding. If either of the financial streams is compromised difficulties can quickly ensue. Indeed, over-reliance on project-related funds can be a key issue for organizations in the sector (PW1, group interview 37). This is partly due to the danger of losing focus as a result of 'chasing the money' (stretching the boundaries of organizational activities because of readily available cash, something which participants control by 'running the rule' over their projects, using fundamentals or guiding principles as a template) but serious problems can arise *even if* the activities are within the broad remit of organizational purpose:

"There's another risk ... you get the right money to do the right things but it's all project-based and you end up having to chase project after project, rather than having some sort of stable or core funding ... it can come from membership, which is pretty reliable, or it can come from seeking an endowment of some sort, or you could get a very rich patron, there are various ways of doing this, but ... effective models have something well beyond just the project by project funding base because ... that sort of treadmill can be quite debilitating and it's very risky, because you lose continuity with people coming and going on projects ... it's not just getting the right money for the right thing ... you do need a core" (PW1, group interview 37).

"So, all the time you were chucking more and more projects into the organization to keep [*if*] going, you felt like you were running on this crazy hamster wheel ... you're in this really difficult position where you're trying to develop things but things are very much in projects and that makes it quite a challenge, but if you can't get off that hamster wheel ... the organization ... eventually falls over, the wheel does eventually fall off" (PW4, group interview 37).

Tensions can arise between short and long-term funding needs, the ability to satisfy multiple stakeholders (with very different world views and perspectives) and the ability to meet core purpose. Participant organizations manage these tensions, formally or informally, through the relationship between strategic thinking (alignment to long-term purpose, vision and mission, including long-term strategic direction, scope, boundaries and organizational remit) and strategic planning (ensuring the resulting aim(s) and objectives are implemented effectively), often in the interface between the two processes and/or within the relationship between the executive and non-executive teams. In other words, there is a significant degree of *connectivity* between the strategic thinking and strategic planning processes (figure 8, section 4.8.1), they are closely interconnected and iterative.

4.6.9 Broader strategic process: A common approach

The division of responsibility for strategic decision-making between the executive team and non-executive teams differed significantly between participant organizations; sometimes the executive team (or individual members) played the dominant role in strategic decision-making, sometimes it was the trustees (non-executive team or individual members). Issues of power and control played an important part in participating organizations (in some more than others) just as in other types of organization. The interplay between the executive and non-executive functions was a particularly important and fruitful area for strategic thinking, where the process of navigating the long-term direction of the organization, its scope, boundaries and other key strategic issues, were played out.

There is a danger of seeing this process as entirely reflective, analytical and fused by common purpose. This is an oversimplification. The interplay between executives and non-executives, the role of dominant personalities, issues of power and control and different (and sometimes passionately held) interpretations of organizational purpose, mission and vision, do play out in a very human context. Not all differences of opinion are easily resolved. Sometimes they result in an individual exiting the organization. Reflection may be a key element of strategic thinking but it is also linked to action, sometimes at a more human level. Nevertheless, the interplay between executive and non-executive teams is a critical place where tensions, conflicts and issues were resolved, where possible, or simply held (theme 9, section 4.7).

The level of formality in the strategic decision-making processes of participant organizations varied but all of them had a process (however informal) for translating their core purpose, vision and mission into operational strategy. Larger organizations used more formal strategic planning systems to guide the strategic process, often with annual and longer planning cycles (theme 8, section 4.10). Smaller participant organizations were more informal and practical. Survival and funding were always close to the surface. However, even the very smallest participant organizations (where the process was entirely informal), there was a process for questioning current decisions, particularly significant ones, against the fundamentals of core purpose, mission and vision to guide decision-making (theme 8, section 4.10). Indeed, in the smaller organizations the link between core purpose and decision-making was often absolutely clear, simply expressed, passionately felt and embedded within day-to-day decisions:

“There are basic principles ... we have a no-kill policy ... my [associate] said to me, ‘well look, you’ve got this tiny thing and you’re feeding it through the night and you’re spending money on the vet, you can rescue 10 [others] with that money’ ... to me it’s not what it’s all about, and once ... I have taken on an animal we’re going to treat that as our companion animal ... whatever it takes, basically. We’ll do whatever it takes. We’ll never give up on an animal for more efficient use of resources, that’s not what it’s about ... there isn’t that much day-to-day decision making to be done once you have established certain principles” (interview 5).

There was a wide diversity of specific approaches to strategic thinking within the participant group, which were influenced by many factors including size, structure, type and focus of the organization, level of growth and stability, funding opportunities and the personalities and mix of key decision-makers. The key relationship between organizational size and decision-making within the participant group was that the level of formality in key strategic processes increased with size but there was a surprising variety and range of approaches that cut across organizational size. The most common comments from participants within smaller organizations related to the fight for survival, the fragility of funding, the passion of the founders and, sometimes the sheer difficulty of keeping afloat. Interesting, despite all, these differences, participants in even the smallest organizations (where the process was entirely informal) went through a deeper thinking process to guide decision-making, even if it was simply spending reflective time together with partners, mentors, friends, family or within the community (for example, interviews 29, 35).

All participant organizations were purpose driven, which was linked to the participants’ strong connection with the natural world. The governance process had a significant impact on the strategic decision making processes for almost all of the participants, although it varied considerably across the group *and* between organizations of the same size. Yet, despite this complexity, the most surprising element of the participant data was the similarities between their stories rather than the differences. The way that they dealt with day to day concerns differed but the fundamental drivers (purpose, mission, vision, values and the importance of their connection to nature) did not (theme 8, section 4.10.5).

4.6.10 Key linkages

Participant organizations navigate strategically through fundamental or ‘first’ principles, which are closely linked to the organization’s core purpose and deeply held value systems. This provides participant organizations with the reflective space, underpinned by a strongly felt connection to nature, which provides the equivalency of a strategic thinking process (sometimes formal but most often informal). The *intentionality* behind these processes is quite different from a conventional business-led, commercially driven, strategic thinking process. Whilst attracting funding to ensure financial viability and sustainability over the long term is absolutely key to participant organizations in order to achieve their purpose, it is of no value to them in its own right. Whilst traditional strategic processes are driven by profit, the participants’ processes are driven by purpose (research question 1, section 4.5).

As purpose driven organizations, which share common values, including a strong connection with the natural world, participant organizations reach out and engage people outside the organization to create extended communities of interest to act collectively and make a difference (theme 7, section 4.9 and theme 5, section 4.16). This provides long term and consistent funding and attracts significant resources

at relatively low cost. Effective strategic planning and financial systems underpin financial viability and sustainability through further funding opportunities, improved resource allocation and more effective working practices (theme 8, section 4.10). Together these components significantly leverage organizational resources helping them to achieve their core purpose, mission and vision (research question 2, section 4.8).

Many of the participating organizations did not use conventional strategic terminology and most participants did not use the term strategic thinking. However, they operate two distinct processes (often informal rather than formal) that run in parallel and fulfil the broad remit of strategic thinking and strategic planning. These processes meet the key strategic, financial and communication priorities of the organizations and are interconnected (figure 8, section 4.8.1). This enables participant organizations to speak different languages to different stakeholders, who have very different worldviews and perspectives, in order to maintain financial viability and sustainability and achieve their core purpose.

The nature of participant organizations is highly relational (themes 1 to 5, sections 4.12 to 4.16). Strong common values and shared experience allow participants to come together and translate individual passion and commitment into collective action in order to make a difference in the world (theme 5, section 4.16), which is connected with their strong connection with the natural world (research question 3, section 4.11).

4.7 Theme 9: Strong minds and big hearts; dealing with conflicts and tensions

What key challenges prevent us doing what we do and how do we resolve these issues? Strong minds and big hearts

We hold the tension of opposites and resolve conflicts that arise from differences between the expectations and worldviews of different groups of stakeholders. By maintaining 'strong minds and big hearts', which expresses the ability to hold two different perspectives of nature simultaneously, we are able to hold the tension from these opposites and resolve conflicts that arise. We do this in pivotal places within the organization, particularly in the relationship between the executive and non-executive teams.

Themes 6 to 9 all relate to the broad strategic process of participating organizations and are deeply interconnected. The primary areas of overlap are covered in theme 6 (section 4.6) and are referenced accordingly in this theme. This avoids undue repetition and integrates the themes more fully.

4.7.1 The narrative

The embedded, and largely informal, strategic thinking process in participant organizations (theme 6, section 4.6) operates alongside, and sometimes within, a parallel strategic planning process (theme 8, section 4.10). These loosely integrated parallel processes emphasize different aspects of the value of the natural world (intrinsic value to 'insiders' and extrinsic value to 'outsiders'). Larger participant organizations tend to have more formal processes, which are often integrated with the governance

process and/or broad consultative processes involving key stakeholders. In smaller organizations these processes are found in informal meetings and get-togethers, often led by founders or small teams.

Participants hold and/or resolve the tensions and conflicts that result from differences between the expectations and worldviews of different groups of stakeholders, funders and extended community interests through the loose integration between these formal and informal processes. Participant organizations do this by maintaining 'strong minds and big hearts', speaking and communicating through two very different modalities, one cognitive and analytical (theme 8, section 4.10), the other relationship based (themes 1 to 5, sections 4.12 to 4.16). Both are absolutely critical:

"People are also engaging practically, so if people come out with us, and they come out and they get involved in forest restoration and they are planting, or they're putting up fences or they are doing a contribution to the forest, that seems to be an incredibly powerful experience for the people that come on those things ... that connection, one act is helping to the bigger whole and ... that's quite powerful" (interview 35, full quote, section 4.14.10).

"We ... develop a business plan, which is generally a 3 to 4 year timescale, so there will be three business plans for every [10 year] strategy and ... we look in more detail at what we're going to do ... after that's done, every project ... gets sense checked against the business plan, so if someone comes up with a proposal for a project that doesn't fit within the business plan, it's unlikely that we will do it. ... We will focus on our work on core objective areas ... what can we actually, realistically, manage to achieve in this time period" (interview 30).

This creates pivotal places within the organization where tensions and conflicts arise and can be surfaced, addressed and, if possible, resolved. These reflective spaces represent the heart of strategic thinking within the organizations (theme 6, section 4.6) and operate as a *lynchpin*, a place that is both flexible and dynamic and allows issues, challenges and different perspectives to be debated within the context of the core purpose, vision and mission of the organization. Critically, tensions and conflicts cannot always be resolved (the underlying differences in worldviews are not always mutually compatible) and, in that case, the participating organizations hold rather than resolve them.

This is a complex area within participating organizations and a sensitive one (due to the human nature of the issues that arise and the dynamics of power and control within the organizations). The processes are often informal and, sometimes, covert rather than overt (and thus not always discussed by the participants openly). However, although the formality of the processes differed between participating organizations (smaller organizations being more informal) and the precise nature and relationship between the processes also differed (smaller organizations did not have *formal* consultative processes that reached out into their extended communities of interest) there were significant common elements within the participant group.

Critically, it is the ability to *hold* tensions and conflicts that arise that enables the participating organizations to reach out and engage their communities of interest *and* underpins their financial viability and sustainability with effective strategic and financial planning processes. This is directly linked to their ability to leverage their limited resources (research question 2, section 4.8):

“Challenge, conflict and competition ... you say one thing and you do another” (BW3) ... “we are constantly in conflict with ourselves ... we are full of contradictions ... it’s a fundamental thing to hold these contradictions” (BW1) (group event 33, participant observation).

There is a strong emergent quality to the nature of the strategic processes within participant organizations (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015) reflecting a process orientation based on the accumulated practical experience of participants (sections 4.5.6 and 4.5.9). The strategic processes within participant organizations are complex and contextual and the subtle nuances in the precise nature of the dynamic between the key strategic processes can helpfully be viewed through the lens of praxis (Whittington, 1996; Whittington and Caillaud, 2008; Goldman, Scott and Follman, 2015). By focusing on what participants actually *do*, the process by which they resolve or hold tensions between the opposing perspectives and worldviews (different types of thinking and approaches) of key stakeholders becomes more apparent (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010; BAM, 2018, 2019). This applies as much to day-to-day decisions as it does to big strategic issues:

“It’s good to have a vision and mission and everybody understands it and has bought into it because, what I’ve found is, that everybody who works in, certainly in our organization, is so passionate that they want to say ‘yes’ to every opportunity, and it’s trying to say, ‘no’, it’s OK to say ‘no’ sometimes, so that we do what we do better, and being able to take the strategy to explain why it should be a ‘yes’ or why it should be a no” [PW5, group interview 37].

The devil is often in the detail and, interestingly, tensions and conflict were often resolved through everyday activities (Regnér, 2003), through the normal dynamics of the governance process or within the coordinating mechanisms between the strategic thinking and planning processes (Mintzberg, 1980). The ability to hold opposing, mutually contradictory, worldviews and perspectives of different stakeholder groups, is not easy. It requires the participants to be able to identify “a specific repertoire of opposing but complementary behaviors that are appropriate to a range of conditions” (Kaiser and Overfield, 2010, p.109). Participant organizations are able to incorporate multiple perspectives simultaneously through a process of institutional coupling (Pache and Santos, 2013; Pircher, 2016; Dahmann and Grosvold, 2017; Rey and Ricart, 2019; section 4.5.8).

For participant organizations, this requires the ability to speak two different languages, one value-laden and the other more cognitive, analytical and evidential, to appeal to both hearts and minds, incorporating both strategic thinking and planning as different but complementary processes and recognising that both are critical to success (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002). This is precisely what participant organizations do but each one does it in its own distinct way, reflecting its size, culture, focus, remit, management dynamic and governance process:

“The average person wouldn’t know the breadth of the stuff the [*organization*] does ... I’ve heard people say to me, why is my membership money paying for [*this*] programme when I want to conserve water voles ... everyone just thinks that we are a nature conservation organization ... and ... that’s only half of it” (interview 25).

The governance processes within participant organizations are complex, diverse and key to organizational success. Trustees focused on what they perceived mattered most in the organizations, which included the organizational mission, vision and values, strategic thinking and organizational direction (BoardSource, 2005; Low, 2006; Hurth, 2017). However, the precise nature and form of the

relationship between the executive and non-executive teams was complex, variable (both between organizations and over time) and depended on the mix of personalities involved and the organizational culture of the organizations. Most trustees played a central role within the participating organizations (Low, 2006), acting as custodians of organizational purpose, mission and vision, taking a leading role in key decision making and playing an important role in resolving tensions and conflicts within the organization. Many exhibited a strong sense of environmental stewardship (Heuer, 2012), thus linking their roles directly to the core purpose of the organization:

“[*The charity*] was a labour of love. It was originally set up by a group of ... enthusiasts and scientists ... its roots are in scientific research and monitoring, so that is still the fundamental aspect. All [*the trustees*] have different areas of experience. A lot of them have been working in ecology for a long time and [*species-specific*] conservation for a quite a while or have other areas of expertise, which they bring to the [*the organization*] ... they're the solid blocks of the organization” (interview 32).

This theme also incorporates the shadow side of the culture of participant organizations (Egan, 2012), which, by its nature, may not be visible, particularly to outsiders. This suggests that part of the strategic thinking process, including difficult matters such as tackling issues where conflicts arise, is conducted behind closed doors and is not immediately visible. As a result, the data in this area should be treated with some caution.

4.7.2 Art of speaking different languages

Participant organizations have developed the ability to speak different languages to different people (theme 1, section 4.12); a values-based language based on the inherent, intrinsic or innate value of nature within their extended communities of interest and a more cognitive, analytical evidenced-based language with the outside world (including funders and those in control of resources), one which emphasises extrinsic value and the benefits of nature for humankind (and in conservation work is backed by scientific evidence). In other words, participants speak their own language amongst themselves but have learned to communicate with others in a language that the world understands.

These languages mirror how different stakeholder groups see the world (the different perspectives and belief systems that they hold about the world in which they live) and, for participants, the way in which they relate specifically to the natural world (themes 2 to 3, sections 4.13 to 4.14). Both perspectives are essential to their financial survival as well as the achievement of their core purpose, their desire to make a difference in the world (theme 4 and 5, section 4.15 to 4.16). However, these different languages give rise to tensions and conflicts, which participant organizations then need to resolve or hold through both formal and informal processes, often within the relationship between the executive and non-executive functions and/or strategic thinking and planning processes.

In order to meet the expectations of different stakeholders, maintain financial sustainability and achieve their core purpose, participating organizations maintain parallel strategic processes. They navigate strategically through fundamental or guiding principles, which are closely linked to the organization's core purpose and deeply held value systems and are embedded throughout the organization (theme 6,

section 4.6). They use these to engage with extended communities of interest (theme 7, section 4.9). At the same time, their financial viability, sustainability and operational effectiveness is underpinned by strategic planning and financial systems (theme 8, section 4.10), which participants recognise is essential for sustainability and survival. It is at the interface of these two systems, and the interplay between the executive and non-executive functions, that issues, challenges, tensions and conflicts arise and are either held or resolved.

This is sometimes formalized within the strategic planning process (larger organizations) or is simply the place where reflective thinking and debate on strategic issues takes place, the equivalency to a strategic thinking process (theme 6, section 4.6). Participating organizations have developed a variety of formal and informal coordinating mechanisms to integrate the strategic planning and strategic thinking processes (figure 8, section 4.8.1) and have developed inclusive consultative processes that reach into their extended communities of interest (larger organizations) and/or informal meetings and get-togethers that achieve the same purpose (smaller organizations). When tensions and conflicts arise it is here that they are likely to be surfaced and addressed, either formally or informally, including those that are largely hidden or embedded within the organization's culture, its shadow side (section 4.7.8) and either resolved or simply held.

It is not always possible to resolve tensions and conflicts that arise because the underlying perspectives and worldviews held by different stakeholders can be mutually contradictory. Sometimes hearts and minds come together and a convincing argument can be made that appeals to both ways of thinking. At other times, these worldviews clash and the participant organizations simply *hold* the alternative perspectives. The participants' strongly-felt level of connectivity with nature (themes 2 and 3, sections 4.13 to 4.14), is not necessarily shared in the wider world, which is why participants have such a strong feeling of being outsiders, of sharing something between themselves that is core to their identity but that others simply do not 'get' (theme 1, section 4.12). Participants most often expressed this as the difference between being connected (being part of the whole) and *not* being connected (being separate from the whole).

4.7.3 Holding and resolving tensions and conflict

The expression 'strong minds and big hearts' captures the need to speak these two very different languages/modalities (ways of thinking, knowing, being and communicating) based on alternative ways of seeing the world and integrates these perspectives within the broad strategic decision-making process, particularly at the point where strategic planning and strategic thinking processes interconnect and within the relationship between the executive and non-executive functions.

Participant organizations have developed coordinating processes and mechanisms (both formal and informal checks and balances) that serve to integrate these two modalities within the strategic process and to hold and/or resolve tensions and conflicts that arise between them. In reality, this process is complex but it includes the interplay between the executive and non-executive teams (sections 4.7.3 to 4.7.5; theme 8, section 4.10.6), the use of fundamental or guiding principles, which are closely linked to

the organization's core purpose and deeply held value systems and act as a proxy for a more formal strategic thinking process (section 4.7.6; theme 6, section 4.6) and the formal and informal coordinating mechanisms that loosely integrate the strategic planning and strategic thinking components of the overall strategic process (section 4.7.7; theme 8, section 4.10).

In addition larger participant organizations often had broader consultative processes that reached into their extended communities of interest (theme 7, section 4.9). Smaller organizations tend to have informal processes where priorities are set by key decision-makers (founders, executive team, influential supporters and advisers) to meet key aspects of the organization's core purpose, modified according to funding and resource availability (section 4.7.7; theme 7, section 4.9).

Whilst it is useful to conceptualize these processes as separate they are, in reality, interconnected. The ability to hold multiple thinking perspectives of the world and integrate them with coordinating mechanisms was common throughout the participant group. However, each organization had a unique way of doing this depending on relative size and maturity, the balance of power, control and responsibilities between the executive and non-executive functions and specific factors such as organizational structure, culture, values, focus and mix of activities.

4.7.4 Trustee-executive relationship

Participants considered the division of responsibility for strategic decision-making between the executive team and non-executive team (trustees) to be critical, in terms of *who* made the key decisions, *how* they were made and how conflicts and tensions within the organization were resolved. The relationship between the executive and non-executive management teams played a key role in resolving or simply holding tensions that arise, both in day-to-day matters and as a result of differences between the expectations of different groups of stakeholders, funders and extended community interests. Many tensions, conflicts and challenges are played out in the interplay between the executive and non-executive teams and the formal and informal checks and balances within these interactions. This section looks specifically at the role of trustees from the perspective of conflict resolution. A more detailed analysis of the relationship between the executive and non-executive functions within the strategic decision-making process is included in theme 8, section 4.10.6.

The role that trustees play within participating organizations varies but a common one is the custodial role as guardians of the organizational purpose, mission and vision of the organization including overseeing strategic decisions (for example, major funding decisions, asset acquisitions and changes to organizational scope) and, sometimes operational decisions, to ensure that activities are within the broad strategic remit of the organization and are aligned to its purpose. In membership organizations members elect the trustees, thus giving them a formal custodial role in overseeing strategic decision-making. Trustees may also recommend investigating strategies or pursuing activities that the executive function has not considered. Where a strong executive function exists this custodial role may be shared, or lie primarily with, the founder or senior executive leadership of the organization; "I'm just a custodian, that's all I am" (interview 18).

This is best illustrated by example. A number of participant organizations were undertaking major strategic changes, which provided insight into the change process and a more detailed understanding of how the organization held the tension between opposing perspectives and attempted to resolve conflicts that arose as a result of the process. This included a participant organization undertaking a major capital project (interview 19, section 4.9.2) and a transition from a dominant founder to a new Chief Executive (interview 35). In the former the change was led by the trustees and necessitated major funding. In the latter, it involved a broad examination of the organization's values and culture as well as strategic boundaries, a process that included strengthening the role of the trustees.

Another participant, a nature conservation organization (interviews 20 to 26), was undergoing a major strategic change, moving from a strong focus on conservation, primarily through its protected nature sites, to a combined focus on both nature and people (the transformation of people through contact with nature, including physical, emotional, social and economic elements). Although this does not alter its fundamental purpose, which now specifically addresses its work in relation to both nature and people, it involves a significant change in strategic scope and organizational boundaries including a broadened remit (for example, interviews 21, 23, 25).

This significant realignment has had a dramatic effect on all parts of the organization, challenging stakeholders (both internal and external) to rethink what the organization is all about, including its members. Although the change is led by the executive team the interplay between the executive and non-executive teams is critical. The trustees play a key role as custodians of the organizational purpose, vision and mission and the dialogue between the functions provides a forum for issues to be surfaced and resolved. The desired outcome of the change is for both key strands (nature and people) to work harmoniously together, represented within the two key aims of the organization:

“[*The two strands*] work harmoniously. That's what's key. And it always comes back to the aims of the [*organization*] ... it's all about ... interactivity as well and ensuring that we're all working together to support the aims” (interview 23).

“What difference are we going to make to the environment? What difference are they going to make to people's lives?, which are two strands of our mission ... we should answer those questions every time. Basically, do these fulfil what [*the organization*] is all about” (interview 21).

There is a strong belief within the organization that this more holistic approach is the 'right' thing to do (“we have a moral imperative to a certain extent”, interview 23) and that it reflects the changing environment in which the organization is working. One participant called this a “sea change” (interview 21), affecting the organization at all levels as the strategic change cascades down through it (for example, interviews 21, 23, 25):

“So we've recently gone to [*a potential partner*] and sat down with [*them*] and they said, what's a [*conservation*] charity coming to see us about ... why do you need our support, tell us about what the organization [*does*]. And we then went through the entire organizational chart and they said, well, you're not really a [*conservation*] charity are you, you're a people charity. And that was quite interesting” (interview 21).

This example also highlights the importance of shared foundational values; connection to the natural

world, the value of nature extrinsically and intrinsically, fairness, justice, compassion, and empathy, particularly to those who are disenfranchised (themes 1 to 4, sections 4.12 to 4.15), which are strong enough to hold the organization together despite the significant changes that are taking place and the different viewpoints that inevitably exist:

“We work with difficult children in difficult circumstances ... very challenging, some of them are ... we all genuinely want to do the best that we can for the young people with whom we work, and you’re not going to do that in isolation ... [*to provide that*] emotionally and physically safe space ... We know, just by who we work with, that what we do works, you can see, just by the looks on their faces, by the fact that they’re talking to each other, not throwing sticks around ... The other reason it’s important is that it’s fundamental to the functioning of society ... social interaction, for example, the empathy, the building of empathy is key ... society doesn’t [*work*] without empathy” (interview 26).

It also illustrates the *process* by which tensions and conflicts that arise from the chosen strategy are held and resolved; the key role of core purpose, mission and vision as cornerstones of what the organization is all about, the critical nature of the dialogue between the trustees and the executive team, the passion and commitment of key players including individuals within the executive team. The process is complex and covers both strategic and operational decisions, allowing the organization’s activities to be considered in the light of its mission and purpose and agreeing decisions on the boundary of the organizational scope and remit.

Apparent clashes of values during this kind of strategic process are both healthy and inevitable. However, they may be misleading or simplistic. Organizational values emanate from a deep connection with nature *and/or* a deep commitment to justice, equity, compassion and empathy (themes 1 to 4, sections 4.12 to 4.15). It is not necessarily either/or. This participant organization exhibited both. The participants’ sense of identity as a group is both deep and complex. This is one reason why the interplay between the executive and non-executive functions provides a space where checks and balances, including different perspectives, can be surfaced, examined and discussed enabling a decision to be made as to whether a line has been crossed in making a particular decision. Participants can sometimes go to a deeper common space. This process is far from simple and it is critical to purpose driven organizations.

Finally, the example provides insight into what can happen when conflicts or differences in perspectives cannot be readily resolved, particularly over the short term. In some cases the organization simply holds these tensions. The strategic change above has been taking place over for over a decade. Significant change takes time. As purpose driven organizations, participants are in it for the long term, sometimes the very long term (theme 6, section 4.6.4) and this can mean holding the tension between different perspectives (almost) permanently, so much so that this way of life is fully embedded into organizational culture and becomes part of the shadow side of the organization (section 4.7.8).

It is also important not to be overly simplistic. There was a wide variation within the participant group in the nature of the relationship between the executive and non-executive teams. All organizations incorporate specific dynamics of power and control, which may include forceful individuals (founders, chief executives, key trustees, but also others who exercise significant influence over strategic decision-

making as a result of their personalities, the history or culture of the organization or stakeholder relationships). Both executive and non-executive teams may include forceful or influential figures and this often has a significant practical effect on the nature of the relationship between the executive and non-executive teams and the decision-making within it (theme 8, section 4.10.7).

The relationship between trustees and the executive functions is explored in more detail in relation to the strategic planning process (theme 8, section 4.10.6), extended communities of interest (theme 7, section 4.9.4) and specialist organizational structures (for example, interviews 2, 3, 4, 7, 20, 30, 31).

4.7.5 Working with different stakeholder perspectives

Other participants who were actively working on organizational scope and boundaries talked of the difficulties of moving from a nature-centred remit to one that includes people. One specific issue is funding. Many of those drawn to supporting environmental organizations (potential members) have a narrow perspective of what this means, favouring nature-based projects. It is, for example, easier for landscape and wildlife charities to raise money for land acquisitions than it is to support people-based projects on existing reserves that enable those who might benefit from close contact with nature to engage with it and experience the benefits of doing so.

Even within nature-based conservation projects there is a clear priority in the mind of the public as to which species are appealing (pandas, whales, tigers) and those that are less deserving of support (insects, spiders) (interviews 14, 15, 27, 28, 30). Participants have to incorporate such perspectives and work with them and ensure communication with stakeholders is aligned. This is not always easy to do. As a result, in the short term, participant organizations are not able to resolve all these differences, merely hold them. It is in holding the tensions, working with them and transforming the world, one person at a time, that they achieve their purpose. This is also the case with alternative perspectives of the natural world, the different ways in which people experience and value nature (extrinsic, intrinsic or both) or, perhaps, don't value it (themes 1 to 3, sections 4.12 to 4.14):

“Engaging the people who live in and around our land is a very different question because what they want is very different. What half of them want is for us not to be there [*murmurs of assent*]. And engaging with our neighbours, who have completely different objectives [*is*] very difficult, but if we weren't ... demonstrating how to try and do things ... we wouldn't ... be able to do half as much as we do now ... You cannot collaborate unilaterally and that is the conundrum ... getting enough people at the same time to stop throwing things at each other” (PW1, group interview 37).

The scope of management decision-making varied widely amongst participating organizations depending on the relative power and influence of the executive and non-executive functions (who drives the strategic direction of the organization; theme 8, sections 4.10.6 to 4.10.7). However, the relationship and interplay between the two functions played an important part in providing the space to hold and resolve tensions that arise as a result of differences between the expectations of different groups of stakeholders (including alternative perspectives of the natural world) in almost all the participant organizations. In the smaller organizations, the processes tends to be informal, not always visible and embedded within the organizations, but were important, nonetheless.

The form and structure of the processes depend on organizational culture, size, the key personalities involved and the balance of power, control and responsibilities between the executive and non-executive functions (theme 8, sections 4.10.6 to 4.10.7). In all cases, the system of checks, balances, routines and procedures ultimately links back to the organization's core purpose and is also embedded within the use of guidelines and fundamentals that are widely used to steer participating organizations and inform important strategic, and sometimes operational, decisions (section 4.7.6).

4.7.6 Links to the strategic thinking process

Strategic thinking processes, which are embedded within pivotal places within the participating organizations (theme 6, section 4.6), include checks and balances on strategic and, sometimes, operational decisions, to ensure that they are aligned to organizational purpose. This is not limited solely to formal mechanisms within the governance (sections 4.7.4 to 4.7.5) and strategic planning processes (section 4.7.7) but is also embedded within the organizations as part of its culture and underlying, deeply held values (sometimes referred to by participants as its ethos) in formal and, more often, informal routines and processes, which often use proxies such as guiding principles or fundamentals as a quick check back into core purpose, mission and values (theme 6, section 4.6.6).

This provides natural boundaries, checks and balances and a reflection point in the broader decision-making process, aligned to the organization's core purpose and values, a space where issues and challenges, considerations of organizational scope (strategic boundary issues), long term direction and alignment of activities to core purpose, as well as tensions and conflicts, may be surfaced and addressed, including those that are largely hidden or embedded within the organization's culture (its shadow side, section 4.7.8). If proposed actions (strategic and, sometimes, operational) lie outside these boundaries the organization is given a more conscious choice of whether or not to act on them (theme 6, section 4.6).

4.7.7 Integration with strategic planning and consultative processes

Participating organizations have developed a variety of formal and informal coordinating mechanisms to integrate the strategic planning and strategic thinking components of the strategic process. These sometimes go beyond the interplay between the trustee and executive functions. In addition to the use of guidelines and fundamentals to steer strategic decision-making (theme 6, section 4.6) some of the larger participant organizations have developed broad, inclusive, consultative processes to bring staff and stakeholders directly into their strategic decision-making processes, including internal staff, trustees, volunteers, members, external communities and other parties (theme 8, section 4.10).

These inclusive processes enable communities of interest (theme 7, section 4.9) to contribute to the annual and longer-term strategic decision-making process, including the identification and prioritisation of objectives, and allow the organization to sense check key components of the process within the broader community before priorities are finalised (theme 8, section 4.10). The integration of key stakeholders

brings together elements of two parallel processes, which traditionally have different roots; the strategic planning process, which is cognitive and analytical (theme 8, section 4.10) and the purpose driven nature of organizations, which is relational and community based (themes 1 to 5, sections 4.12 to 4.16; theme 6, section 4.6). These processes, formal or informal, allow participating organizations to identify and surface tensions and conflicts and consider these within the mission and broad remit (agreed activities) of the organization. It is important to note that these are *consultative processes* not *consensual* processes. In other words, not all participants are equal in decision-making authority and influence.

Smaller participant organizations tend to be informal and rely more heavily on single individuals (founders, strong executive figures or trustees) or small leadership/management teams to co-ordinate the process and this team calls upon supporters from within their communities of interest when necessary. This process may also include key supporters or individuals who have been involved with the venture for some time, or since its beginning (volunteers, the Chair, family and partners or key contacts within the sector). In practice, there is a high level of diversity in approach within the participant group. Each organization has its own response based on size, contacts, funding, nature of the charitable venture, organizational culture, the key personalities involved and many other factors. However, the key elements of the process, normally around prioritizing objectives, tend to be common to all. Objectives are set to meet key aspects of the organization's core purpose, these are then prioritised and modified according to funding and resource availability (theme 8, section 4.10).

The nature of these consultative processes is diverse. Some larger participating organizations integrated them into the formal strategic planning process and directly involve key internal and external stakeholders (interviews 30, 32, 35). Others (interviews 10, 12, 18) discussed the inclusive nature of their decision-making process (and in founder-dominated organizations the implications of this) and smaller organizations outlined their informal processes (theme 8, sections 4.10.2 to 4.10.3 and interviews 13, 17, 27, 36). This element of inclusivity within the strategic planning system is one way in which participant organizations hold and resolve the conflicts that arise from serving different stakeholders with different needs, worldviews and perspectives on the natural world (themes 1 to 4, sections 4.12 to 4.15). It provides a platform for debate where contentious or simply important issues can be put on the table:

"I've found working in this sector, people like to know everything, want to be involved in everything and want to make [*a difference*] and be involved in the decision making a lot. And, that's just not possible ... in an effective organization, so the [*consultative decision-making*] funnel for me, seems to enable me to be able to say, "well, we're here in the funnel now. Thanks very much, you gave your input there ... I'm afraid you're not one of the people who are involved in the decision and the decision's not gone your way, but it was really considered at the start. Otherwise, that disgruntled thing starts to happen" (interview 35).

These processes were structured but inclusive, fluid but also integrated into the strategic planning system:

"[*During*] the last iteration of [*the strategic process*], we looked at a lot of other people's similar types of things and we got those things 'out there' and we had long discussions around them, and we set up little working groups to go away and work on different bits and brought that back [*into the discussion*] and it was a kind of collective opinion forming, mainly from staff and trustees, but ... we also had two workshops in which we involved our member organizations ... that's about 15 other organizations who also fed into it" (interview 30).

For other participants, particularly smaller organizations, this inclusivity with the larger communities of interest is achieved through reaching out to those who share the values of the organization and, sometimes, to others who may not, but have impact on its charitable purpose, including those in the sector, those facing similar challenges or conducting relevant research, and personal contacts and networks. It also brings alternative perspectives into the organization, which can be taken into account within the decision-making process. Sometimes it includes those who do not, necessarily, share the organization's interests or may even have opposing interests:

"We're not a campaigning body, and what we're very keen to do is to work across all stakeholders and, of course, stakeholders have their own interests, and they can often conflict with one another, so what we're very anxious to do is to ensure that we understand where they're coming from, and try to seek a compromise, a balance that will achieve our aims of conservation ... with what their interests may be, which may be economic, may be social or cultural, whatever. So, a lot of what we are doing is working with ... industry or it might be fishermen, or it might be [the] oil and gas industry" (participant 8).

"The community is fantastic. ... I don't see landowners as the enemy. I see landowners as stewards and, and potential partners on the journey. We have very good relations with landowners, with the farming community, with the woodland owners. We have problematic relationships with government departments so, in a sense, we have a shared common challenge that a lot of landowners have, bureaucrats" (interview 9).

Other participants achieved this through a mixture of community engagement, working in or with multiple organizations and personal networking (interviews 13, 27). Smaller organizations often have a small team that draws on supporters as and when they are needed. Meetings do not need to be formal:

"We also like to do social things as well ... we don't have specific socials, but when we have monthly meetings ... we meet in a pub, if we want to eat dinner together first ... whenever we talk about [something] ... we go and take over somebody's country estate for a weekend and go and do field work and enjoy ourselves as well" (interview 27).

Smaller participant organizations are often dependent on a very small group of people, particularly volunteers, without which they would not be able to operate. They are also sometimes dominated by a single individual who drives the organization. There is a sense of togetherness (theme 5, section 4.15) as well as anxiety (survival, funding, tensions between key players) and this is reflected in the informal strategic planning process, a small group of often highly committed people who come together to achieve their purpose within the boundaries of available resources and funding and draw, as necessary, from within their communities of interest:

"Everybody who works in, certainly in our organization, is so passionate that they want to say 'yes' to every opportunity ... my organization's very small, we rely exclusively on volunteers, and they come up with brilliant ideas but the big question is always, 'how are we going to do this?', 'who's going to do this?', 'who's going to take a lead?' and that's ... a bit of a sticking point, it's difficult if you are small" (PW5, group interview 37).

Most of the areas of conflict and tension were addressed, either through formal processes within the strategic planning and management process, including regular executive management meetings or through the non-executive (trustee) role, or informally within the senior team. Many participants had regularly monthly management meetings, which might serve to enable the team to put sensitive matters

on the table (for example, interviews 12, 18). Smaller participant organizations may deal with these matters through regular meetings of the core team. Shadow side issues, however, may not surface within these more formal processes of their own accord. If issues are of significant concern to the senior leadership of the organization they may trigger a dedicated process, generally managed from the top. There is, however, the possibility that some of these issues might not be raised at all.

4.7.8 Shadow side

Whilst larger participating organizations have formal processes where tensions and conflicts can be surfaced and addressed, not all issues are recognised overtly and some are largely hidden or embedded within the organization's culture, sometimes referred to as its shadow side (Egan, 2012). Participants rarely talked about this overtly, although some referred to issues relating to politics, power and control within their organizations (theme 8, section 4.10.7) and to areas where the strong values-based culture and commitment to shared purpose created ways of thinking, being and acting that were not formalised or acknowledged openly. Matters contained within the organization's shadow side are not necessarily positive or negative, they are simply not openly acknowledged (Egan, 2012), sometimes because they seem obvious to insiders but are difficult for outsiders to recognise.

One important example of the shadow side within participating organizations is the very strong sense that they are outsiders; different, odd, and do not fit into the mainstream (theme 1, section 4.12). This underpins the need for them to speak different languages to different people (a values-based language based on the intrinsic value of nature within their extended communities of interest (theme 7, section 4.9) and a more cognitive, analytical language with the outside world, one which stresses extrinsic value and the benefits of nature for humankind. They speak their own language amongst themselves, which is aligned with their passion and comfort zone, but have learned to communicate with others in a language that the world understands:

"We keep being told, we're selling our souls" (PW5) ... "I have to continue to be me and to be true [*and continue*] ... caring about nature and people" (PW1) (group interview 37).

The capability to step between different perspectives is essential to participants to *both* meet their core purpose and survive financially, a cause of tension in its own right resulting in them being "full of contradictions" (interview 1). The feeling of being outsiders was both strong and universal and it has very important implications:

"Given the huge obstacles ... even within the church, you've got a lot of obstacles to overcome ... ecological understanding is very, very, very, very much at the start of its journey. ... the appreciation of the concept is not widespread at all ... pushing at the door that is the boundary of acceptability ... how you communicate what you believe in is a really, really tricky job... There's a thin line ... advocacy is one thing, dictatorship is something completely different and ... you cross that line and you really do start to alienate yourself from people ... It doesn't fit the boxes ... you are dealing with stuff that is based on the human condition, the value systems that exist within a given community or society and how to infiltrate and inspire and inform those systems ... there's nothing tangible in there. It's all very woolly ... you have to accept that that is a difficult, sometimes tortuous process" (interview 10).

The use of the word “church” above to describe the environmental community is interesting as it emphasizes the perceived missionary nature of environmental work. The feeling of being an outsider is expressed above in terms such as there’s a thin line”, “the boundary of acceptability” and “start to alienate yourself”. The journey itself is described in terms of “tortuous”, “difficult”, “the appreciation of the concept is not widespread at all” and the duplication in the phrases, “very, very, very, very much at the start of its journey” and “really, really tricky job”.

It is not just about the ability for participants to communicate their values beyond their ‘natural’ extended communities of interest by finding a common ground of shared interest. It is also about being a member of a community based on personal values and demonstrating that you ‘get it’; an ‘it’ that needs no explanation between those who share a perspective on life, a belief system and a set of common experiences (themes 1 to 5, sections 4.12 to 4.16). This became apparent at the beginning of the research process:

“It is almost as if I have to earn the participants’ trust, to prove my commitment to the cause ... meeting with a participant in their own space, at ground level, however challenging the logistics, seemed to be an important part in establishing commitment and building trust ... Once trust has been built there was often a distinct shift from cognitive, analytical language (with concomitant discussion of the many benefits of nature from an extrinsic perspective and the dangers of our current disconnection with nature in terms of our own survival) to more personal, value-driven language with an emphasis on the inherent value of nature, in and by itself, and a marked increase in the willingness of participants to discuss the seriousness of the current environmental crisis, the likelihood of disastrous, often life threatening outcomes and the personal feelings of sadness, anger, grief and isolation from the mainstream that appear to form the shadow side of the highly committed, passionate, driven and sometimes obsessive desire to support the natural world and effect positive change through our connection with it” (researcher memo, April 2017).

As trust was established within the interview process participants opened up about wider matters including organizational politics, power and control (theme 8, section 4.10.7) and a sense of competitiveness within the sector (theme 7, section 4.9.7). Sometimes, after the formal interviews they opened up further and shared, very passionately at times, their hopes, fears and reservations. What they talked about was sometimes confidential or not appropriate to put into a public document (where it can be taken out of context). One theme, however, was prevalent. They expressed, to varying degrees, their feelings of anger, sadness, grief, isolation, a sense of disempowerment and the frustration of not being understood (theme 1, section 4.12.3), which might best be expressed as:

“We’ve just agreed, we’re all just pissing in the wind” (participant BW3, group interview 33).

During the time of the research study, the concept of ecological grief (Vince, 2020) has come into the public domain, “the loss of valued species, ecosystems, and landscapes triggers strong grief responses in people with an emotional attachment to nature” (Gordon, Radford and Simpson, 2019, p.193). This provides some context for the intensity of the feelings that the participants had in common and why this drives the strategic processes of their organizations. It also highlights the tensions that arise out of speaking two languages, feeling separate and different from the world, not being able to fully express their deeper values and beliefs in all circumstances and being part of a tightly bonded community. This creates a greater level of complexity in looking at the processes by which participant organizations surface and address the tensions and conflicts that arise from their work. These are not always

transparent. They are, at times, deeply, and sometimes unconsciously, hidden within the culture of the participant organizations.

“It seems like the majority think [*my attitude is*] silly. You do feel ... like a minority who gives, who cares enough to change, make a change” (interview 24).

It is fitting that this final theme, links back directly to the first theme, ‘We are outsiders’ (theme 1, section 4.12). All the themes are interconnected and the participant data is best understood from the bottom up.

4.7.9 Key linkages

Participant organizations have developed a number of coordinating processes, principally within the relationship between the executive and non-executive teams, but also within the strategic thinking and strategic planning processes and the extensions of these processes into the extended community through consultation and mutual interest. This enables participating organizations to surface, address and hold and/or reconcile tensions and conflicts that arise as a result of the need to speak different languages to different interest groups and to integrate the more formal strategic planning process with the informal strategic thinking process.

The reflective, yet active, spaces within these processes and mechanisms operates as a lynchpin within the organization; a place that is both flexible and dynamic and allows issues, challenges and different perspectives to be debated within the context of the core purpose, vision and mission of the organization. It thus provides a critical role in the strategic thinking process (theme 6, section 4.6; research question 1, section 4.5) and enables the organization to leverage its limited resources by fully embracing its communities of interest (theme 7, section 4.9) and operating effective strategic and financial planning processes (theme 8, section 4.10), which underpin financial viability and sustainability over the long term and allows participating organizations to communicate with traditional stakeholders in a language that they understand (research question 2, section 4.8).

Critically, the participating organizations are able to *hold* the very different perspectives and worldviews of their key stakeholders (those which cannot necessarily be resolved), which provides the platform and stability for them to be able to achieve their core purpose, to do what they want to do, to make a difference in the world. This is a key finding of the research.

Participating organizations are purpose driven and the strategic process is deeply relational in nature (themes 1 to 5, sections 4.12 to 4.16). Not only does this relational element allow them to embrace their full communities of interest including staff, members, volunteers, neighbours, local communities and partners, but it is also the essential glue that holds them together, providing the passion, commitment and dedication to overcome the challenges imposed by limited resources and influence (the relational nature of strategic process, research question 3, section 4.11).

4.8 Leveraging resources (RQ2)

How does this sense of connection contribute to the ability of these organizations to achieve key strategic and operational objectives with limited resources?

This section summarizes the participants' analytical story in relation to research question 2 (sections 4.8.1 to 4.8.2) and discusses it in relation to the wider body of literature (sections 4.8.3 to 4.8.5). For clarity indicative literature references are given within the analytical story but the full discussion is in the sections that follow. This maintains the flow of the analytical story and the strong focus on participant data.

4.8.1 Structure: Key themes and relationships

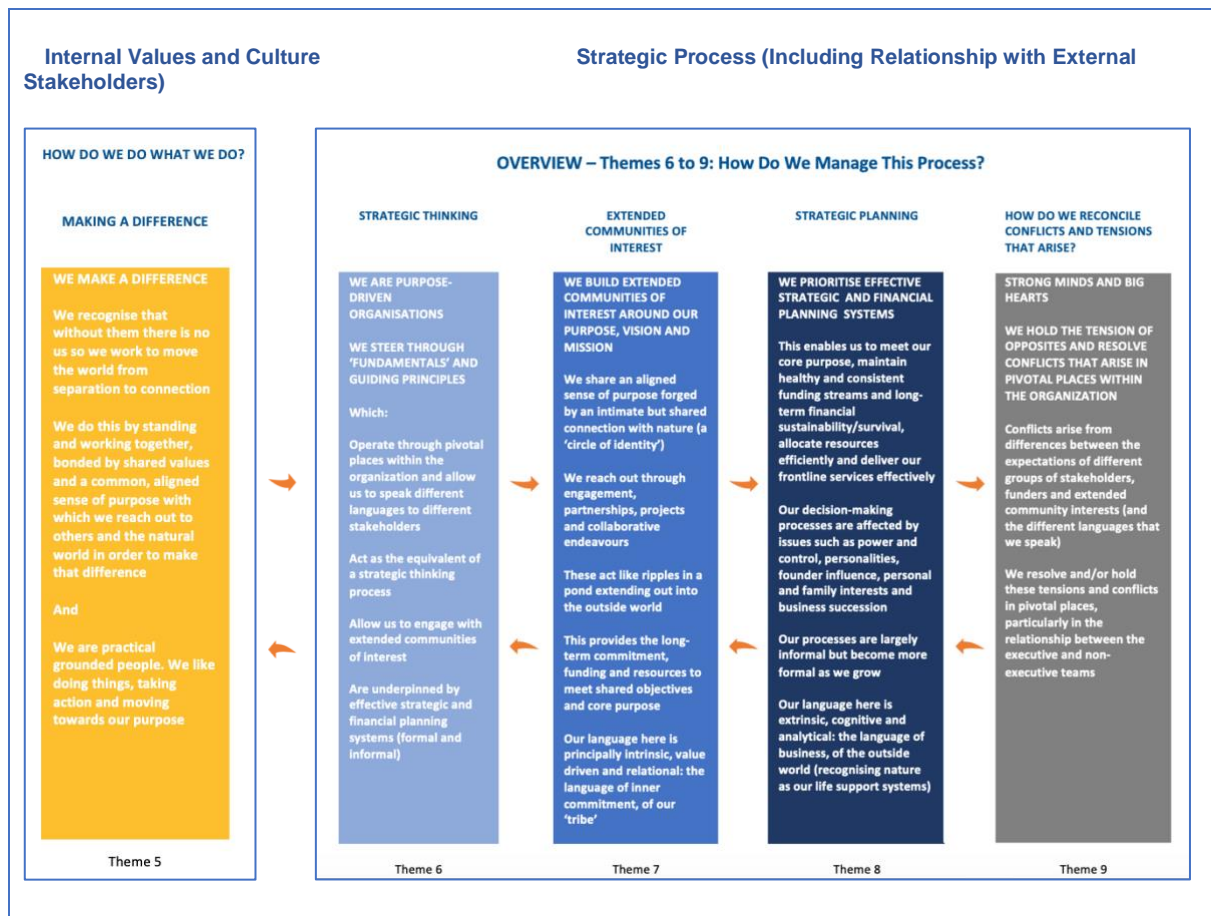
The second research question is focused on the achievement of key strategic and operational objectives with limited resources, which is addressed in themes 5 to 9. Theme 5 relates to the question, 'how do we do what we do?', themes 6 to 8 relate to the question, 'how do we manage our organization?' and theme 9 asks 'what key challenges prevent us from doing what we do and how do we resolve these issues?' These themes are key components of the participants' story relating to research question 2 (sections 4.8.2 to 4.8.5) and are explored further, as individual narratives, in the following sections:

- Theme 5: We make a difference (section 4.16).
- Theme 6: Strategic thinking: We are purpose driven organizations: We steer through fundamentals (section 4.6).
- Theme 7: Extended communities of interest (section 4.9).
- Theme 8: Effective strategic planning and financial systems (section 4.10).
- Theme 9: Strong minds and big hearts (section 4.7).

This structure provides two pathways for following the analysis of participant data, each of which adds value. The summaries by research question provide a pathway to conceptual insights and theory development within the context of the extant body of the literature. The thematic analysis allows us to go deeper into the participant story and thematic narratives, providing a wealth of detail for practitioners in the field, contributing to the praxis literature. The themes relating to research question 2 are illustrated in figure 8 below.

The participant data is complex and interconnected and themes often relate to more than one research question. Research question 2 is integrated with the strategic thinking process (RQ1, section 4.5, themes 6 to 9) and the relational nature of strategy (RQ3, section 4.11, themes 1 to 5). These linkages are noted in the data analysis and discussion but for ease of presentation research question 1 addresses themes 6 and 9 (those uniquely related to strategic thinking) and research question 2 addresses themes 7 and 8, which are key to the way in which participant organizations leverage their limited resources. In order to integrate the literature discussion more effectively, the key literature relating to research questions 1 and 2 is considered together in the discussion on strategic thinking above (RQ1, sections 4.5.3 to 4.5.9). Similarly, theme 5 is discussed in research question 3 (section 4.11) as it is strongly linked to themes 1 to 4, which focus on the relational nature of the strategic process within participating organizations.

Figure 8: How Participant Organizations Leverage Resources (RQ2)



Source: Researcher data analysis

4.8.2 The participants' story

The relational foundation of participant organizations (research question 3, section 4.11) produces highly committed, often driven, organizations, which operate on limited resources and need to call on the goodwill and financial and personal support of others in order to achieve their objectives. They leverage their resources by running two parallel, loosely integrated, often informal, processes, broadly aligned to strategic thinking and planning, which enable them to speak different languages to different stakeholders, who hold very different perspectives and worldviews. This is illustrated in figure 9 below.

Participant organizations speak one language to 'insiders' (theme 1, section 4.12), which reflects a deep sense of connection with nature and the importance of intrinsic as well as extrinsic value, and another to the wider world, which is more cognitive and analytical and focuses on extrinsic value, including nature's critical role as humanity's life support system. These languages mirror how different groups see the world (the different perspectives and belief systems that they hold about the world in which they live) and the way in which they relate specifically to the natural world. This allows participating organizations to leverage their limited resources by reaching out to both their extended communities of interest (those who 'get it') and external stakeholders who are necessary for the long term sustainability of the

organization and to achieving its core purpose (who may not 'get it').

Figure 9 – Integration of Strategic Thinking and Strategic Planning



Source: Researcher data analysis

The strategic thinking and planning processes are both key to success (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002) and are loosely integrated by formal and informal processes and coordinating mechanisms (Mintzberg, 1980), most importantly within the relationship between the executive and non-executive teams (the governance role; Low, 2006; BoardSource, 2005; Hurth, 2017). Participant organizations use ‘fundamentals’, ‘first’ or guiding principles, as a proxy for core purpose and underlying values, and this acts as an equivalency to a more formal strategic thinking process (theme 6, section 4.6; research question 1, section 4.5). This different way of thinking is closely linked to the core purpose and values of the organization; what it is really about, the deeper meaning that lies below what the organization is seeking to achieve. It is embedded alongside and within the more formalised strategic processes, including strategic planning and governance (research question 1, section 4.5):

“just because that’s what the funder says they’ll give us money for doesn’t mean that’s what you should do If that’s not what your vision and mission is, you have to be true to yourself” (PW6, group interview 37, full quote section 4.6.4).

The intrinsic values-based language that participants use between themselves, based on deeply held personal values (themes 1 to 3, sections 4.12 to 4.14), enables them to reach out to extended

communities of interest who share an aligned sense of values and purpose. Extended communities provide long term financial stability and resource continuity, the bedrock support underpinning long term sustainability (members' subscriptions, legacies and a commitment from volunteers and others to work for reduced, limited, or no financial reward):

"Our contribution is in our time and our knowledge, and we're, in some circumstances, able to use that as the matched funding against somebody else who's put in the cash. There are things that we can do as a community, either very much locally or over the whole of [*the region*] ... and this is where community groups like ours can come in and do things" (interview 13).

Participant organizations (particularly the smaller ones) also rely heavily on trusted acquaintances, colleagues, friends and communities in informal networks and they use these to reach out and engage others (Granovetter, 2005). These internal and external communities connect with what participating organizations are trying to achieve, sharing a sense of aligned purpose based on deeply held values creating a 'circle of identity' (theme 1, section 4.12), which spreads out into the world like ripples in a pond (theme 7, section 4.9):

"Once a year we do a sort of volunteer gathering for all the people who have given lots of hours over the year, just to get together because a lot of these volunteers will never have met ... and I put together a slide show to try and show all what they have helped to achieve in a year and you do sometimes look back and think, how did we cram all that into the last twelve months?" (interview 17).

These shared values and beliefs are not, necessarily, aligned solely with the 'top line' purpose or values of the participating organizations. Some come from a shared sense of *experience* in connecting with nature at a deeper level (theme 3, section 4.14), whilst others serve a diverse range of beliefs, sensibilities and needs, which include emotional, physical, mental, practical, social or spiritual connections with the natural world (theme 2, section 4.13; research question 3, section 4.11). They also tap into a broader sense of connectedness, widely held by many participants, which is expressed in values such as empathy, compassion, fairness, justice and support for others, especially the disenfranchised, the underdog (theme 1, section 4.12). In short, extended communities enable participant organizations to work collectively to make a difference in relation to their objectives and core purpose (theme 5, section 4.16).

In order to survive and prosper, however, participant organizations also need to engage with the wider world to attract additional funding and support (grant and project funding) and to be able to communicate with policy makers and those in control of resources and power. Strategic planning processes play a critical role in communicating with the external world and underpinning operational effectiveness:

'You have to be aware of the wider picture and you've got to be clear about what you can do ... [*but*] you've got to be realistic about what you can achieve, and in a small organization there's loads of things you want to do, but you've got to prioritise and focus ... which is difficult ... especially when you are so low on resources as we all are' (interview 32).

"Thinking back to what the priorities [*are*] and [*how can*] we contribute, [*how*] can we achieve the outcomes" (interview 28).

Effective strategic planning processes are essential to secure ongoing funding and financial stability

(funding bids, project work, government and other grants etc.), help to prioritise objectives and strategies (taking into account limited resources) and enable participants to communicate with the outside world in a language that it understands. This normally involves taking an analytical, cognitive approach, for example, using evidence-based conservation principles and scientific methodology to justify actions and objectives. Conventional analytical business processes are also designed to improve strategic and operational effectiveness and improve resource allocation:

“Well managed and well administered systems are vital ... we try to make the admin slice as small as possible” (BW3, group interview 33).

Funding considerations are key to the participant organizations to achieve their purpose, for effective implementation and financial viability and sustainability. The importance of ensuring stable funding is increased by charitable rules for reserves, tied funding and the difficulty of attracting funds for ongoing maintenance and administrative costs. Reliable long-term funding is essential to avoid the dangers of over-reliance on revolving short-term financing. In short, for small and medium-sized environmental organizations funding is survival (section 4.10.4). This requires both reaching out to extended communities of interest for long term funding (members subscriptions, legacies, targeted fund raising), which is essential to cover administrative expenses, and to the wider world for grants and project-based funding to cover the implementation of organizational objectives. This is challenging for all the participant organizations:

“Things do need to be project-led because the money has to come from somewhere” (interview 17).

Both sets of stakeholders are vital to the participant organizations and it is the way that they are brought *together* that ensures their long-term sustainability and enables them to achieve their core purpose by leveraging their limited resources effectively. As a result, they have developed the ability to *hold* tensions that arise when the underlying needs, perspectives and worldviews of key stakeholders’ clash (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010). They incorporate multiple perspectives simultaneously through a process of institutional coupling (Pache and Santos, 2013; Pircher, 2016; Dahlmann and Grosvold, 2017; Rey and Ricart, 2019; section 4.5.8). This capability is vital for their long-term sustainability and to achieve their purpose (research question 1, section 4.5):

“A lot of our work is driven by our ... our interests and our passion for [*our core purpose*] but we also always try to ensure that ... we have scientific evidence to make sure that what we’re aiming for is valid and there is evidence of a need for it, because obviously we are a small organization, so we do have limited funds and ... we can’t just do what we want [*laughs*]. Unfortunately ... even if there is something we really want to do and are really passionate about, you have to make sure that you are using your funds as efficiently as possible” (participant 32).

The integration of the strategic thinking and planning processes is complex and differs between participating organizations. In larger organizations strategic thinking is often partially integrated into the strategic planning process, governance process and broad consultative processes reaching out into the extended community (theme 7, section 4.9). In smaller organizations the processes tend to be combined, although the mix of those involved in decision-making may vary depending on the nature of the decision being taken. It may depend on the personalities involved, matters of power and control (strong

personalities, internal politics, founder's influence and legacy, succession, who is really trusted in the organization and so on), the relationship between the executive and non-executive teams and the practical dynamics of management and organizational culture (theme 7, sections 4.7.9).

Smaller participant organizations often have informal, sometimes very informal, processes. Critically, however, they expressed similar views on the importance of the different modalities underlying strategy; an analytical function (planning and effectiveness) and a broader, deeper concept, one that is about seeing the bigger picture, yet rooted in what is most important within the organization (strategic thinking, purpose, mission, vision and values, *expressed* through practice). Like the branches of a tree stretching out towards the life-giving sun, they also depend fundamentally on their roots.

Sometimes participants struggled to express this paradox, the ability to shoot for the stars with a bold long term vision but to remain focused on practical, pragmatic, down-to-earth action. Some participants seemed more content talking about the visionary aspects of their work and almost reticent to discuss the importance that they attached to practical matters, which, perhaps, they felt may not be 'strategic'. Yet, when they did talk about practical matters they made it very clear just how important it was to them. It is the focus on the specific and the practical that plays such an important role in bonding participants together to act collectively and make a difference (themes 1 to 5, sections 4.12 to 4.16; research question 3, section 4.11):

"I am a practical person ... whatever I have, wherever I've got to, I've got simply by sheer hard work ... and dedication and experience, you just learn by experience" (interview 18).

"We're not strategic, I don't think... [*and*] you get focused on looking after one poor little Pipistrelle bat that's got a broken wing ... what I actually like doing is going out and doing the fieldwork and looking after the individual bat ... I do spend some time doing the more strategic stuff but it's not as much fun" (interview 27).

"We all started as volunteers ... [*and*] ... I was happiest when my work was practically outside managing a piece of land" (individual and group interviews 3 and 33).

Smaller organizations are often strongly influenced by key individuals (for example, the founder of the organization) or act in small teams when considering 'big' decisions but they also reach out into their formal and informal communities for advice and support. There is a strong element of participation even in the smallest of organizations:

"It's the Margaret Mead [*American cultural anthropologist, 1901-1978*] quote isn't it ... 'never doubt that a small group of committed people can change the world' and then the second bit is the important bit, 'indeed it is the only thing that ever has' ... maybe we're too small? No ... that's not right!" (BW3, group interview 33).

The complex overlap between these diverse but interconnected processes is not always easy to determine. The processes are not always formal, visible or overt. They also contain elements of the shadow side of the organizations, those elements within organizational culture that are not openly acknowledged (Egan, 2012), sometimes because they seem obvious to insiders but are difficult for outsiders to recognise (section 4.7.8). Interconnecting processes can be deeply intertwined and not easily disentangled. An informal meeting may be the opportunity to review organizational mission and

vision, clarify objectives or it may be the culmination of a long standing difference in opinion between key players, which results in one of them exiting the organization. Alternatively, it may simply be the chance to get together with like-minded people, explore opportunities, talk about life and share a beer.

4.8.3 Theoretical context

Research question 1 (section 4.5) is framed from a theoretical perspective, whilst research question 2 is more outcome based, how the strategic thinking process enables participant organizations to leverage their limited resources. These questions are interconnected and this section builds upon the literature evaluation for the first research question (sections 4.5.3 to 4.5.11). The research participants focused on what they actually *did* rather than strategic theory, thus giving the second research question a more practical orientation, despite the significant degree of overlap in the theoretical context for both questions.

Many of the key areas of literature between the two questions overlap; the relationship between the strategic thinking and planning processes (Mintzberg, 1994; Heracleous, 1998; Liedtka, 1998; Graetz, 2002; Goldman and Casey, 2010), the emergent view of strategy (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), the importance of a focus on strategy-in-practice (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015) and the complex and embedded nature of strategic thinking process within pivotal areas within the participating organizations, where conflicts and tensions are resolved or held (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010).

To avoid repetition the section is focused on the second research question, in particular, the way in which the strategic thinking and planning processes work together *in practice* to enable the participating organizations to leverage their limited resources.

4.8.4 Relationship between strategic thinking and planning

The strategic thinking process is embedded, fluid and responsive, reflecting an emergent quality (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), which is complemented by the more cognitive, analytical framework of the strategic planning process (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002; Whittington and Cailluet, 2008). Participants recognised both processes as critical to organizational success.

Strategic thinking (rarely acknowledged directly but referred to as fundamental principles or guidelines, acting as a proxy for organizational purpose and values) is related to the broader strategic processes (Mintzberg, 1994; Porter 1991; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012) where strategic thinking and planning are different but complementary processes (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002). Although the participants recognised the value of both processes they related to them in different ways. Strategic planning was equated with operational decision-making (Heracleous, 1998) and/or the more formal strategic process, whereas strategic thinking was a different way of

thinking, one that provided the checks and balances on strategic and, sometimes, operational decisions, to ensure that they were aligned to organizational purpose (theme 6, section 4.6).

This is the key distinction between the participating organizations and the strategic literature that is strongly focused on commercial organizations. Participant organizations are purpose driven not profit oriented and purpose (or mission) plays a key role in strategic decision making:

“Nonprofits do not base their strategy on money, nor do they make it the center of their plans ... [they] start with the performance of their mission” (Drucker 1989, p.89, researcher italics).

“Purpose is being infused increasingly at both the corporate and the individual levels ... connecting individual purpose to that of the organization—what we refer to ... as *unity* ... suggesting the harmonization of personal and organizational purposes across two basic dimensions: purpose fluidity and purpose synergy” (Rey and Malbašić, 2019, pp.17-18).

The strategic thinking process of participating organizations was bounded by organizational purpose, mission, vision and values. Although the literature recognises vision as a key element of strategic thinking (Bonn, 2001, 2005; Moon 2012), Mintzberg (1994) suggests vision emerges from a broad variety of processes and perspectives rather than through the strategic planning system, and this strongly resonates with the participant data:

“Strategic planning, as it has been practiced, has really been *strategic programming*, the articulation and elaboration of strategies, or visions, that already exist” (Mintzberg, 1994, p.107, italics in original).

The participants’ analytical story indicates that the strategic thinking and planning processes act *together* to ensure the long-term sustainability of participant organizations and to enable them to achieve their core purpose, thus leveraging their limited resources effectively. Strategic thinking and strategic planning are complementary because “creative ground-breaking strategies emerging from strategic thinking have to be operationalized through convergent and analytical thought” (Heracleous, 1998, p.485) and “must sustain and support each other for effective strategic management” (Graetz, 2002, p.461). This distinction in scope and the complementary nature of the processes was evident in both the larger participating organizations and, more informally, in the smaller ones as they sought to combine the different modalities underlying the two key processes within the overall decision-making process.

Thus participants readily accepted the need for effective strategic planning but they differentiated it from core strategic decisions that related to organizational purpose, mission and vision, thus strongly resonating with the observation of Mintzberg (1994) that:

“Strategic planning isn’t strategic thinking. One is analysis, the other is synthesis. ... strategic planning often spoils strategic thinking ... [and] confuse[s] real vision with the manipulation of numbers” (Mintzberg, 1994, p.107, researcher italics).

Some strands in the strategic literature suggest that strategic thinking spans both rational and intuitive processes and divergent and convergent ways of thinking (Graetz, 2002; Bonn, 2005). Bonn (2005) defines strategic thinking as “a way of solving strategic problems that combines a rational and convergent approach with creative and divergent thought processes” (Bonn, 2005, p.337), thus questioning the distinctions made by Mintzberg (1994) and Heracleous (1998). In participant organizations, these

processes are often informal, loosely integrated and sometimes bleed together. However, in practice, the participants *did* differentiate between the two underlying ways of thinking and they used different language when talking about them.

The essence of strategic thinking was linked to the core purpose and values of the participating organizations, through proxies such as ‘fundamentals’ and ‘first’ or guiding principles, and discussed as a more embodied process (research question 3, section 4.11), whereas strategic planning was a more cognitive and analytical tool linked to the prioritization of strategic options and objectives, operational decision-making (Heracleous, 1998), effective resource allocation (Hatten, 1982) and the ability to communicate with the outside world. The language used by participants in the former was more expansive, in the latter more utilitarian, where they tended to accept the necessity of a more formal, analytical planning process but sometimes railed against its use inappropriately (most significantly in the monetization of the value of nature).

The different emphasis between thinking modalities is described by Graetz (2002) as a “whole brained” approach (linked to emotional intelligence) and participants, in their own way, were attempting to do just this:

“The elements of left-brain thinking reflect the planning side of strategy making (need for logic, analysis, attention to detail, focus on meeting deadlines, etc.), while right-brain thinking mirrors the thinking (creative, inquisitive, intuitive, entrepreneurial) component of strategy making [and] ... the hallmarks of emotional intelligence clearly reflect a ‘whole-brained’ approach to thinking and behaving” (Graetz, 2002, p.460).

In practice, the strategic process within participant organizations is complex (reflecting the nature of the environment), holistic (a response to complexity and reflecting the participants’ ecological/ scientific perspective) and practical (the preferred orientation of many of the participants). The broader strategic processes within participating organizations are more interconnected and nuanced than the literature sometimes suggests. They are best understood through the lens of strategy-as-practice, where a process of careful observation can highlight the subtleties of decision-making, which thereby become more apparent.

4.8.5 Ability to leverage limited resources in practice

The complementary nature of the strategic thinking and planning processes (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002) underpins the ability of participant organizations to speak different languages to different stakeholders; to ‘insiders’ (reflecting core purpose, shared values and an emphasis on intrinsic value) and ‘outsiders’ (cognitive and analytical thinking, including scientific and evidence-based approaches and an emphasis on extrinsic value). These underlying perspectives and worldviews cannot always be reconciled and thus the strategic processes are parallel and loosely, rather than fully, integrated (figure 8, section 4.8.1).

The participant organizations reconcile or bridge different perspectives through a process of institutional coupling, linked directly to their organizational purpose (Pache and Santos, 2013; Pircher, 2016;

Dahlmann and Grosvold, 2017; Rey and Ricart, 2019; section 4.5.8). This allows conflicts and tensions that arise to be surfaced, addressed, where possible reconciled and, if not, simply held (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010; BAM, 2018, 2019). This process is vital for the long-term sustainability of participant organizations and to achieve their purpose.

The complex, interrelated nature of the strategic process allows participating organizations to leverage their limited resources by reaching out to their extended communities of interest (those who 'get it'), who provide long term financial stability and resource continuity, the bedrock support for long term sustainability (members' subscriptions, legacies and a commitment from volunteers and others to work for reduced, limited, or no financial reward). It also enables them to communicate, and work with, more traditional stakeholders, who are essential for financial sustainability and the ability to achieve organizational purpose (grant and project funding, access to policy makers and those in control of resources and power). It is the way in which these two areas act *together* that ensures the long-term sustainability of participant organizations and enables them to achieve their core purpose by leveraging their limited resources effectively.

The different thinking modalities underlying strategic thinking and strategic planning come together at pivotal points within participating organizations, often contained within the relationship between the executive and non-executive teams. These pivotal points act as a lynchpin to surface and address key strategic issues and tensions and conflicts that arise from meeting the different needs and perspectives of stakeholders. In larger participant organizations this was often incorporated within the formal strategic planning process and/or broad stakeholder consultative processes, whilst in smaller organizations it was normally informal. The role of the trustees in the participant organizations is also critical (BoardSource, 2005; Low, 2006) with the trustees playing an important role acting as custodians of organizational purpose, vision and mission.

One specific area of theory that helps to inform the embedded nature of the strategic processes within participating organizations is the systemic view of strategy (Granovetter, 2005). Participants rely heavily on trusted acquaintances and communities in informal networks and they use these to reach out and engage others, a form of embedding the organization in their extended communities of interest. Granovetter describes this process in terms of the value of weak ties in building community and purposeful collective action, which is strongly resonate with the participant data:

"Collective action that depends on overcoming free-rider problems is more likely in groups whose social network is dense and cohesive, since actors in such networks typically internalize norms that discourage free riding and emphasize trust ... More novel information flows to individuals through weak than through strong ties. Because our close friends tend to move in the same circles that we do, the information they receive overlaps considerably with what we already know. Acquaintances, by contrast, know people that we do not and, thus, receive more novel information ... Moving in different circles from ours, they connect us to a wider world" (Granovetter, 2005, p.34).

The research participants care very deeply about what they do. It is part of their identity. They are driven by their core purpose and find opportunities to reach out into the community. Drucker (1989) noted this when he called not-for-profit organizations "a powerful countercurrent ... forging new bonds of

community” (Drucker, 1989, p.93). Participant organizations have developed the ability to hold different worldviews and perspectives of multiple stakeholders, running both strategic planning systems (based on analytical and cognitive thinking) and embedded strategic thinking processes (based on a more holistic and systemic way of thinking) using different languages. These emergent processes (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), reflecting strategy-in-action, a lifetime of practical experience and a strong passion for what they do, underlie the ability of participant organizations to leverage their limited resources successfully.

4.9 Theme 7: Extended communities of interest

How do we manage our organization (2 of 3)? We build extended communities of interest around our purpose, vision and mission

We build extended communities of interest around our purpose, vision, mission and deeply held values, which act like ripples in a pond extending out into the outside world. These consist of all those, both internally and externally, who are connected to our work, including our staff and non-executive teams, volunteers, members, local communities, partners and networks. We reach out to this extended community through engagement, sharing, partnerships, projects and collaborative endeavours in the outside world.

The participant data underlying this theme is broad and extensive. This theme is related closely to themes 5, 6, 8 and 9 and is referenced where appropriate to avoid undue repetition and integrate the themes more fully.

4.9.1 The narrative

Participant organizations reach out to extended communities of interest (Granovetter, 2005), those that share an aligned sense of purpose forged by an intimate but shared connection with nature (a ‘circle of identity’, theme 1, section 4.12.1; theme 3, section 4.14) and provide the long-term commitment, funding and resources to meet shared objectives and core purpose. It is these groups that provide long term financial stability and resource continuity and are the bedrock support for *long term* sustainability (members subscriptions, legacies and a commitment from volunteers and others to work for reduced, limited, or no financial reward).

This shared sense of alignment enables the participant organizations to leverage their limited resources by working in collaboration with others who share their ideals or have experienced a similar underlying sense of connection with the natural world (theme 3, section 4.14). Collaborative endeavour with others also enables the participating organizations to ‘scale up’ and have an impact in the world where they would be too small to do so otherwise. By working together they make a difference in the world by following their core purpose (theme 5, section 4.16):

“I’d say that we’re in the business of scaling up our impact, and that means we keep those narrow things that are really [*key to who we are*], this is how we know what we’re doing and we

know we're doing it well, but ... to scale up, we can't do it on our own, we can't do it tree by tree, we can't do it volunteer by volunteer, we've got to find a way of working with and supporting others, otherwise it won't happen ... because it's really [*important*], this part of [*the country*] really needs some help" (interview 35).

The personal, experiential connection with nature is important in building the shared values that bind participants together and underpins a shared sense of aligned purpose, sometimes expressed by participants as simply the pleasure of working with others like themselves, those who 'get it', understand 'the thing', 'the hook' or 'the spark', (theme 3, section 4.14). Whereas many traditional models tend to categorise a sense of connection with nature in simple terms with affective, cognitive, and behavioural components (Schultz, 2002) participants held a deeper, more dynamic and complex perspective. Their experience with the natural world is both very specific (diverse and individual entry points, focusing on the particular) and also generates a universal sense of meaning. a common experience of knowing what it means to be 'in relationship' with nature (theme 3, section 4.14).

The participants' expression of their connection with the natural world is reflected extensively in the nature-based literature. A few examples will suffice. Joe Harkness, in a series of blogs around his book, *Bird Therapy*, puts it this way:

"Every avian encounter took me one step closer to accepting who I am" (Harkness, 2019).

Andy Goldsworthy, British sculpture and photographer, emphasises the link between our connection to nature and our connection to ourselves:

"We often forget that we are nature. Nature is not something separate from us. So, when we say we have lost our connection to nature, we've lost our connection to ourselves" (Goldsworthy, 2018).

Austrian Biologist, Clemens Arvay, discusses the strength of this connection with the natural world in his book, *The Biophilia Effect*, and asserts that our identity is nature, quoting his friend, Andreas Danzer:

"Everyone feels the need deep inside to be close to nature. We have roots, and they definitely did not grow in cement" (Arvay, 2018).

Participants, most of whom have been trained in seeing a holistic perspective, often readily acknowledged the importance to them of being part of something bigger, and found this in their connection with nature (themes 2 and 3, sections 4.13 to 4.14). Paradoxically, the chosen focus for this connection is often at a concrete, specific level. For many participants it mirrored a journey to knowing themselves.

This common underlying experience of connection binds participants together and fuels their ability to work collectively towards a common purpose in order to make a difference (theme 5, section 4.16). It is of great importance to them and feeds into their personal and collective sense of identity (theme 1, section 4.12), thus giving rise to the chosen terminology of 'communities of interest' or 'circles of identity'. These deeply held value systems, expressed individually and collectively, and linked to the organizational purpose, mission and vision through proxies such as fundamentals or guiding principles (theme 6,

section 4.6) allow participant organizations to engage with and build extended communities of interest that form an essential part of the strategic process (engagement, funding and policy) to achieve organizational purpose and operational objectives:

“Connection with the local community ... that’s something that needs just highlighting” (interview 2).

“We have more than a hundred organizations, external local community-based organizations come to [us] every year, that’s 100+ organizations, some of them several times a year” (interview 4).

“The local element is important ... we find that even with our beach cleans ... [and] ‘adopt a crag’ initiative, which was very successful” (interview 36).

“I think it was about 42 volunteers involved directly [*in the event*] ... they committed ... over five hundred and something hours over seven days ... about 30 of those people helping on that project were brand new ... it was going through a retirement complex and so ... we involved them in very many other ways ... we did manage to get an 81-year-old in waders because he was physically fit ... and he had a brilliant time, he said it was the most exciting thing he’d done in years” (interview 17).

Participant organizations have developed the ability to speak different languages to different stakeholders (theme 1, section 4.12), a values-based language based on the inherent, intrinsic or innate value of nature within their extended communities of interest and a more cognitive, analytical, evidenced-based language with the outside world, one which emphasises extrinsic benefits. Participant organizations use the more embodied, values-based language, linked to core purpose and mission, to reach out and engage extended communities of interest. This enables them to tap into the motivation, commitment and passion of those within them, thus providing long term, reliable funding (subscriptions, legacies and visitor revenue) which underpins collective endeavour and enables them to leverage their resources by engaging like-minded people to work in service-oriented roles as volunteers, trustees and community engagement (frequently informal and below market rates) to support the purpose, vision and mission of the organization.

Reaching out and engaging extended communities of interest as a way of achieving organizational purpose is a natural extension of like-minded people coming together in groups and organizations in order to make a difference (theme 5, section 4.16). The core purpose, vision, mission and deeply held values ripple out into the world where they connect with others who share this worldview in part or whole. The theoretical context for this theme overlaps with themes 5 and 6 (sections 4.15 and 4.6) including the literature on the importance of core purpose (Ghoshal and Bartlett, 1993, 1997; Collins and Porras, 1996, 2005; Stead and Stead, 2000; BoardSource, 2005; Hurth, 2017; Beng Geok, 2018; Thakor and Quinn, 2018; Rey, Bastons and Sotok, 2019) mission (Drucker 1989), vision (Senge, 1990; Bonn 2001, 2005; Moon, 2012) and shared values, beliefs and the culture or ethos of the organization (Allio, 2006; Weeks, 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012; Mitroff, 2016; Cardona, Rey and Craig, 2019). The capacity to extend out into extended communities of interest is strongly rooted in the relational nature of strategy within the participant organizations (themes 1 to 5, sections 4.12 to 2.16; research question 3, section 4.11).

In addition, both intentionality and commitment (themes 1 and 2, sections 4.12 and 4.13) are also key

(Mintzberg, 1987b; Hamel and Prahalad, 1994, 1996, 2005; Collins and Porras, 1996, 2005; Liedtka, 1998; Mintzberg et al., 1998; Collins, 2001). Much of this literature, however, is focused on commercial organizations and is not fully representative of the strongly purpose and values-driven participant organizations, which embody a wide societal remit, not a profit orientation, that *defines* their strategic processes. This is better captured by the literature on not-for-profit organizations (Drucker, 1989; BoardSource, 2005; Low, 2006).

4.9.2 Extended communities and networks

There are many different ways of describing these extended communities of interest. In business terminology they might be referred to as stakeholders, although their stake in the organization may be indirect rather than direct, informal rather than formal and primarily through a shared sense of connection with the natural world or a broader sense of justice, fairness and equity in more general terms (theme 4, section 4.15). In a practical sense, the organizations' connections may resemble a network, although the deep sense of connection to nature is stronger than a relationship based solely on shared mutual interest. In short, they might best be described as communities united by common objectives and/or purpose linked to the natural world and/or the wider, more complex relationship of nature *and* people. As a result, one participant noted that "collaboration is very different from industry" (interview 28), partly because the belief systems and values underlying it often come from a very deep personal place.

Extended communities of interest thus go beyond a business definition of a stakeholder, a person with an interest or concern in the success of a business (Appendix G), which might traditionally include full and part time staff, volunteers, members and local communities who may have some degree of shared interests and/or a stake in the organization's success. The nature of participant organizations is more proactive, they reach out and engage those who can share their vision, mission and purpose (those who do and those who *potentially* might do so). This is why participants sometimes referred to the 'missionary work' of their organizations, which in some cases was incorporated within the initial premise of the organization:

"[It was set up as a] community-based initiative that was aiming to achieve several objectives, primarily to allow people to experience and be inspired by wildlife on the doorstep here using the latest technology. And, at the same time, get some core environmental messages across and also help the local area and the town regenerate in terms of tourism regeneration, revitalization" (interview 19).

Although the organization above has a very broad purpose (for people to "experience" and be "inspired" by nature) it is focused and specific in terms of both fauna and landscape (its conservation and environmental objectives). It is aimed at a very broad customer base but it is also rooted in the local community and wildlife ("on our doorstep"). It is also strongly experiential and inclusive (including those who currently do not have any particular interest in nature), allowing visitors to experience a connection with nature for themselves. The organization seeks to make a difference by engaging with a very wide group of people to spread the meaning of that connection experience at all levels. Finally it has specific community regeneration objectives, which means it interacts with local people and community groups, local government and tourist organizations, to name but a few examples. Even without unpacking this

example further it is evident that it has extensive communities of interest that are both broad and deep.

The participant data yielded an extraordinary variety and depth of community reach and engagement and the scale of activities and interaction was significant, even in the smaller organizations (interview 4, 12, 13, 17). Community reach included informal as well as formal networks (interviews 9, 27), local community engagement (interviews 2, 17), professional associations, including environmental, scientific, educational and career-based (interviews 2, 28) and multiple active roles across the sector (interview 27). This short paragraph does not adequately portray the breadth, depth and extraordinary variety of these community connections. The closer the researcher looked at the participant data the more the extensive web of these relationships became apparent.

The larger participants frequently worked alongside or interacted with government and the public sector at multiple levels, partly for practical funding purposes, but also to share their passion for the natural world as broadly as possible; the young (with the hope that the seed of connection may take root in young minds to flower later on in their lives), the marginalised and excluded (in order to provide opportunities that they might not otherwise have) and those with physical, emotional or mental health issues (to provide a sense of wellbeing, healing and nurture):

“We have our own charitable trust ... in order to underwrite the cost of environmental education because that’s a fundamentally loss-making activity” (interview 12).

“Young children, primary children are fascinated by all of it [*geology*] and are ready to absorb it all ... [*however*] ... there’s just not much in the curriculum at all” (interview 13).

“[*We are focused*] very much on education, so doing work with schools, with cub groups, beaver groups, pre-schools and then we also [*started*] working with older people as well, so we go into old people’s homes as well and so we started doing speaking and WIs [*Women’s Institute*], rotary and all those kind of things” (interview 17).

Participants also talked extensively of collaborative working through formal partnerships, joint project work and more informal working relationships. Nature engagement initiatives (theme 4, section 4.15.4) span organizational boundaries and are delivered by a wide range of organizations and engage large numbers of people. They are inclusive and engage people with nature *and* community and are an intensely practical way to help transform the lives of those who participate. They “spread the word” (interview 15) and are part of the spirit of the organization, “this is not a question about people and nature, this is ... more a question about people and other people” (interview 14). There is a missionary aspect to them, spurred on by feedback of the dramatic effect of the experience on clients (interview 15) and they are closely connected the core purpose of many of the participant organizations:

“It’s about engaging with people, it’s about getting people to understand a bit of nature, go out and look into a wild place, understand it, record that, tell people about it ... and do a bit of conservation there. And so, it’s about engaging positively in that area and ...spreading the word. ... we’ve got an awful lot of quotes from people and young children who do [*it*], about being taken to areas and how they felt, and one of them is, you go into [*nature*]... out there and you just breath out all the bad stuff and the anger goes off you. And this is from a kid of about 13 or something. And that’s quite typical of the kinds of quotes we have and it’s quite heart rendering” (interview 15).

"[It covers] inner cities, to disadvantaged communities ... [and gives those taking part a way to make an] association between myself, my family, my community and the natural world" (interview 14).

Each participant organization, even those that were very small, had its own *specific* communities of interest but they were also engaged with spreading the word about the importance of the natural world in a more *universal* sense (theme 4, section 4.15) based on strong underlying values and a deep connection with nature (themes 2 to 3, sections 4.13 to 4.14). Participants expressed these values in both specific and universal terms and there was often a strong sense of shared values, purpose and identity. However, they also expressed them more simply; the comfort or shared sense of belonging that comes with working with others who share our views; being with people who are, in some way, a bit 'like us' or 'get it'; sharing the company of other people doing something we all enjoy, even if there are many different reasons and motivations for doing so.

This can make it difficult to pin down values precisely in organizational terms, or determine exactly what it is that makes staff members happy working for the organization when they might not appear to relate specifically to some of its key characteristics, elements of its culture, routines or practices:

"To do a good job here ... we'd like you to share our values ... but you don't really have to ... [*one member of staff*] is not a great fan of nature, (s)he doesn't really go outside very much but (s)he loves the values of [*the organization*]. So, (s)he's here for the human side of [*it*]. It would be very difficult for us to get him/her up the top of a hill planting a tree So, when you are dealing with a spectrum of people and you're trying to say nature connection's really important and there are people here that don't really feel that, but they're great in the team, what does that mean?" (interview 35, researcher gender neutrality).

Yet, common interests are not the whole of the story. There was also a marked sense of *inclusivity* in participant responses and many were more than willing to work with others even if self-interest was also a significant factor for them (projects requiring critical mass, access to funding streams, commercial organizations fulfilling government set-off requirements and so on). Working with these groups can help to resolve conflicts and open up funding opportunities, providing a very broad, inclusive definition of organizational purpose is taken.

A significant number of participants talked extensively about the need to break down barriers between groups that have traditionally held very different views in order to meet the challenges of an interconnected world, both in scientific terms (the unity of nature) and the need to work with others to achieve the organization's purpose and/or mission (for example, interviews 8, 35; section 4.7.7, interviews 8, 9). This was often discussed with reference to the seriousness of the environmental issues or other challenges the participant organizations faced (theme 4, section 4.15).

What is manifest in the participant data as a whole, however, is the sheer *depth* of feeling that pervades the responses. Whilst there is a huge variety in the specificity of those responses, it is a foundation belief amongst all participants that what they do is important, deeply so. It is this that ultimately provides the shared basis for their values and aligned sense of purpose and almost compels them to reach out and engage with others with whom they share *something* and that something is a way of looking at the world or, perhaps, just a way of being. A broader sense of underlying purpose permeates all that the

participants do and these “common interests and goals” (interview 27) bond the extended communities together to varying degrees. Simply put, like attracts like and cuts across boundaries:

“We have that emphasis on project work, but that’s partly ... because we have people who’ve done academic research on, not on [*the focus of the charity*], but we’ve actually got somebody who’s got a squirrel PhD [*and*] two herpetologists ... they’ve got the same sort of interest in research in conservation related to different species. We’ve got somebody who’s a member of the Marine Conservation Society so does quite a lot of work for them as well, so there’s quite a lot of overlap ... in addition we have people as well who have links with the Local Authorities and the Wildlife Trust” (interview 27).

Some examples are particularly telling, especially when they come out of left field. One participant was seeking a non-executive Chair for his/her fledging concern, which had minimal income at that time. A friend recommended somebody who is a very well-known national figure. He duly called her and said that he would be delighted to do it. (S)he was so surprised that when he introduced himself by his first name (s)he didn’t recognise who it was.

4.9.3 Community reach

Each participant organization has its own unique linkages with specific related communities. Each was different, but each one, no matter how small, actively reached out and engaged with those around them. Taken as a whole, participants were engaged with a very broad, diverse number of individuals, communities, organizations and public bodies.

This includes professional organizations (associations and groups dedicated to the focus area of the organization at local, regional, national and international levels), academic and research establishments (universities, research institutes, individual academics with specific research experience, biological data collection agencies and citizen science activities), local community links and community engagement, all levels of the education system (primary schools, secondary schools, universities at undergraduate, postgraduate and postdoctoral levels), the public sector (government departments, local government, government agencies) NGOs, other charities within the sector and outside the sector (those with complementary social, economic and cultural aims, including broader social welfare objectives) and broad networks of contacts.

Relationships with other individuals, groups, communities and organizations supporting complementary social welfare objectives are similarly diverse and include working with differently abled individuals or those disadvantaged or excluded in society (in educational, economic and social contexts), people who suffer with mental and physical illness, bereavement, loneliness, isolation, addiction problems and a host of other issues (theme 4, section 4.15). In addition, there are those who are actively connected with the organizations, either as full or part time members of staff, volunteers, non-executive staff (trustees), members, ‘friend of’ groups and organizations, local communities, neighbours (particularly in rural areas, for example, local landowners) and others whose lives interact with the participating organizations at some point (for example, engagement with local issues, campaigns, advocacy and direct action, whether personally or through the traditional and social media).

The nature of purpose driven organizations is to seek to achieve that purpose. At one of the workshop events participants talked about the importance of collaboration underpinning what they did, of being “a big, sometimes noisy community” (group interview 37). This is part of why collaboration in the environmental sector is “very different from industry” (interview 28).

4.9.4 Communities of interest: Volunteers, members and trustees

Volunteers, members and trustees are at the heart of small and medium-sized environmental organizations. There are many reasons why people choose to volunteer or contribute financially towards a purpose driven organization but one key one is the satisfaction from:

“Being involved in something ... being part, contributing to something that’s bigger than yourself” (interview 3).

Volunteering offers something important for both participant organizations and the volunteers. For small and medium-sized environmental organizations it provides vital resources, without which they could not achieve what they do (part of their ability to leverage their resources, section 4.9.5). For participants it offers a wide spectrum of benefits from simple companionship, a chance to share a drink with good company after a day of hard physical activity working outside in nature or vital skills and competencies to build a career in conservation. It often offers something much deeper, for some people it is a matter of “life and death” and it is essential for their wellbeing (interviews 3, 16, theme 4, section 4.14.11; interview 25, section 4.12.7) and attracts strong levels of commitment (interview 31, section 4.14.11). Above all, it can be a great leveller:

“You can have people who are very high earners down to people who are unemployed, old people, young people, people in between, all on that even-footing, in the river working together and chatting away, having a nice time and getting along together but helping us out by doing the river restoration with us too. So it sort of puts people on an even footing regardless of what their daytime job is or isn’t” (interview 17).

The non-executive function, trustees, is also vitally important to participant organizations, both in an overseeing capacity (including governance) and also in providing specialist skills and capabilities in areas that the executive and staff team lack. In addition, they play a vital role in holding and reconciling the tensions that arise as a result of differences between the expectations of different groups of stakeholders, funders and extended community interests (theme 9, section 4.7). The role of trustees varied widely within the participant group (theme 8, section 4.10) but there was often a very hands-on component:

“[We hold] conservation group meetings as well for people who have a scientific background, to develop and discuss projects and actions that we want to take” (interview 32).

For member-based participant organizations members provide vital long-term financial stability and resource continuity that contributes to their *long-term* sustainability (members’ subscriptions, legacies and further contributions to appeals) enabling them to achieve short term shared objectives and longer-term core purpose. Again, the process is not one way. Some participant organizations were members of local, regional, national and international organizations as well as many being members-based organization themselves (for example, interviews 2, 7, 11, 20 to 26, 28, 35).

For members, trustees and volunteers alike, being part of a wider environmental community is important (theme 1, section 4.12); the ability to make a difference, in relation to something practical, specific and often local, something that they can make their own, without necessarily expecting anything in return (themes 3 to 5: sections 4.14 to 4.16):

“The volunteers, they’re happy to do something that they can see, it’s being able to make a difference ... or even having a sort of ownership of a particular species, so for example our project in Derbyshire is focusing on [*a species that is*] specifically found there, the hills around Derbyshire, so it’s trying to connect people to get them to own that species, and see that that’s *theirs* and that they can do something to protect it and get them on board” (PW6, group interview 37).

“We’re actually about building incrementally on what we’ve already learned as practitioners” (BW3, group interview 33).

This deeper sense of connection (themes 2 and 3, sections 4.13 to 4.14) is powerful and creates a strong community of like-minded people and provides an ability for participants to work together to make a difference in the world (theme 5, section 4.16). The relationship between the trustees and the executive function is explored in more detail in relation to strategic decision-making in theme 8, section 4.10.6, and in terms of the resolution of tensions and conflicts in theme 9, section 4.7.4.

4.9.5 Collaborative endeavour

Collaborative endeavours and relationships with extended communities of interest play a key role in the ability of participating organizations to leverage their resources, including the contribution of volunteers and the ability of smaller organizations to scale up through partnership, joint projects or other forms of collaboration. Volunteers are essential for participating organizations to achieve their purpose, even if, for the very smallest organizations, it is only in the form of calling upon family, friends and members of the local community to volunteer or assist in running the organization:

“I have a lovely accountant ... who currently donates her time for free in exchange for dinner, to do my accounts ... [*why does she do this?*] because she likes [*what I do*]! That’s why she does it” (interview 29).

Almost all of the participants had volunteered in the past and many had entered the environmental sector by doing so:

“The fact that most of our organizations do originate from things started by volunteers is important and remains important to us” (BW3, group interview 33).

This statement is significant because it demonstrates the deep root of the participants’ desire to make a difference in the world, to achieve a purpose on behalf of others, even if they are not rewarded for doing so in any material sense. The reward comes from the process of working together to achieve that purpose, making that difference in the world. Although volunteers are *not* free labour (there are many associated costs) they make an important contribution to the ability of participant organizations to deliver their purpose, mission and objectives by leveraging their resources, particularly in the smaller organizations.

Sometimes the line between volunteers and those who work in the sector (professional staff, proprietors, non-executives) is fuzzy as remuneration levels can be considerably below commercial levels. Even many of those who did not have a formal volunteering position at some time in their lives regarded themselves primarily as stewards or custodians:

“The legacy ... we’ve planted over a million trees during my tenure, [I’m] just a custodian, that’s all I am” (interview 18).

The ability to access funding and the capacity to scale up despite their limited size are key drivers for collaboration, which is closely linked to the community-orientation of the sector. The relatively small size of participant organizations means that funding is constantly a key issue, normally a matter of survival. Collaboration with others, including partnerships and shared projects, is one way in which they can tap into funding opportunities (theme 8, section 4.10). Collaboration plays an important role in enabling participating organizations to scale up and have an impact in the world where they would otherwise be too small to do so, often through engaging in joint project work (partnerships and projects, section 4.9.6):

“I started working with the LINK organizations [*Scottish Environmental LINK*, section 4.9.6] and saw the value of how all the NGOs working together were able to contribute to achieving environmental objectives, or tying to. LINK was actually set up ... in the early ‘80’s [by] a handful of very active people ... and it’s just grown from there ... It’s 37, 38 organizations, so you’ve got ... the really big ones ... and, then you’ve got all the smaller organizations, which also have a body down South, so [are] members of a nationwide thing, but they have Scottish divisions. And then it goes right down to very small organizations ... and their representatives work very hard across a range of LINK work” (interview 36).

As part of the interview process the researcher requested a limited amount of key data on the participants’ organizations including approximate annual income, staff numbers (full and part time), volunteer numbers and the type of organizational structure adopted (charitable, social and community enterprise, hybrid with a charitable component and so on). This data was contextual but provided a useful reference point relating to their ability to leverage their resources and the value of their contribution to society (in the context of their purpose and a broader contribution around this work).

Overall, the process of valuing resources available to participating organizations and assessing their contribution to society is complex. The approximate value of some resources (the contribution of volunteers) is easier to quantify than others (the value of a professional network). In the same way, valuing the contribution made by participating organizations within their communities through value-added activities, such as working with local communities, engaging in schools, welfare related activities, community advisory services and so on, are difficult to quantify but do add real value to the communities concerned.

Some activities are more susceptible to quantification than others (for example core funded project-based activities that are based on agreed outcomes and evidence-based conservation principles) but the wider value-added contribution of participant organizations is often holistic and easy to underestimate because the contribution extends to physical factors (wellbeing), social factors (inclusion), spiritual factors (a sense of value and meaning) as well as economic factors. As the research study is qualitative no attempt

is made to do so.

Many of the larger participants did approximate the value of volunteering and publish it in their annual reviews alongside standard financial data (income, expenses and key financial data), partly to acknowledge directly the significant value of the contribution made by volunteers (volunteering and membership data of key environmental organizations is shown in figure 4, chapter 3, section 3.8.3). This is also communicated regularly to members through membership magazines and online media. The number and value of volunteers can be high, compared with full and part time staff. Some of the smaller participating organizations have very few permanent staff and rely heavily on volunteers. One of the smaller participating organizations, for example, had less than three equivalent full-time staff but over a hundred volunteers and a considerably larger membership body:

“We now have [*a large number of*] members who are actively paying ... individual or ... family [*membership each*] year. So, sometimes those are people who are also our volunteers. But they might be people who can't volunteer or don't want to volunteer but are still passionate about [*the charity*] and so we have those as well” (interview confidentiality respected).

Another participant, a direct-action organization had very limited full-time staff but thousands of volunteers world-wide. However, regardless of size, volunteers, as well as members, are a critical component of the strategic decision-making framework of purpose driven organizations. Community engagement and support (members and volunteers) is linked back to fundamentals, a shared sense of passion, concern and/or interest in the organization's core purpose, enabling it to leverage its resources to meet its key objectives.

4.9.6 Partnerships and shared projects

Partnerships and shared projects arise naturally out of the desire and need to collaborate. They are based on shared values and an aligned sense of broad purpose at one level and on the practical reality of funding needs on another, for example, the matched funding opportunities available on project-related work; “things do need to be project-led because the money has to come from somewhere” (interview 17). Whilst *all* forms of collaboration are important for participating organizations (and play a vital role in underpinning their ability to leverage their limited resources effectively) partnerships and joint projects are the most *visible* form of this collaboration. It is also important to note that working with others throws up additional challenges and there is often an element of competition in collaborative ventures (section 4.9.7).

Partnerships take on a great many forms. Some are formal and involve significant elements of risk and resource sharing and some form of joint co-ordination of project activities. Others are informal, loosely connected, and it can sometimes be difficult to ascertain the precise outcome (for example, national linkages of large charities, which also serve political and policy objectives). Almost all, however, involve working together on a practical basis. Partnerships and joint projects result partly from the need to match the scale of challenges that are faced by the natural world with the resources to deal with them (both practically and in terms of advocacy for policy changes). Thus, they are one way in which small and medium-sized environmental organizations can scale up to tackle systemic challenges and issues that

are necessary if they are to meet their core purpose:

“I think the big trend is partnerships. That’s where we’re going ... because ... one, the funders, that’s what the funders are looking for but two, it actually makes sense strategically if you look at it, the strength of several people coming together with different resources and different ideas and different strengths makes good sense” (interview 21).

“That is something ... that [we] could not dream of doing all on our own ... the majority of our projects we do tend to work with other organizations because we are a relatively small organization and we have far more clout by working with the others” (interview 30).

The many ways in which partnership and collaborative working enables participant organizations to meet their core purpose and specific objectives is best illustrated by example. Access to funding, sharing of scarce resources and the cumulative value of specific organizational skills and capabilities (allowing small organizations to scale up) all play a key role in encouraging small and medium-sized environmental organizations into collaborative ventures, particularly as ecological challenges often demand a holistic response. As a result, for many participants collaboration is a way of life. Many of the larger participant organizations described this process in detail (for example, interviews 11, 30, 35). Collaborative working is complex but there are a number of key elements involved:

- Collaborative working (and particularly project-based work) significantly enhances the ability of small and environmental charities to meet essential funding needs.
- The nature of funding restrictions (capital reserve requirements, tied funding etc.) increases the necessity for collaborative endeavour, as does the practice of funders limiting the number of grants to single organizations (4.10.4).
- For larger participant organizations the funding process is often tied closely into the strategic planning and budgeting process, including the process of prioritizing organizational objectives (theme 8, section 4.10).
- Collaboration allows multiple organizations to tackle systemic and/or holistic environmental concerns (the interconnectivity between species, habitats, landscapes and broad ecological issues), which is often, in itself, more attractive to funders with multiple funding objectives. Collaborative working enables small organizations to scale up to tackle environmental issues more holistically.
- The focused nature of smaller environmental organizations results in specific skills, capabilities, resources and networks that play an essential role in broader project-based work. The depth of specific expertise can be deeper and broader than is apparent at the surface level.
- Environmental organizations struggle to fund general expenses and maintenance costs, which restricts their capability for manoeuvre and can make them more vulnerable financially than a superficial analysis indicates. Although project-based funding does not normally resolve this difficulty, it does strengthen the tie between operational work and external funding.

Collaborative working was not restricted to the larger participant organizations. Even the smallest participants were able to engage with and link into larger communities, much of the time by working together informally on specific issues, but also with the potential to extend this over the longer term (for example, interviews 4, 8, 27, 32, 36). This highlights the extent and importance of informal networking and collaborative arrangements amongst smaller environmental organizations, most often through knowledge networks (personal contacts, membership of larger groups, working for multiple organizations, research and funding links etc.). These linkages and community associations are less visible than for larger participant organizations but are active nonetheless. Membership organizations also play an important role (for example, Scottish Environmental LINK, the forum for Scotland's voluntary environmental organizations) as they enable smaller participant organizations to share resources, knowledge and contacts and therefore work together more effectively.

Smaller organizations tended to have more informal linkages than larger ones. As the size of the organization and the scale of funding increases the formality of the collaborative process also tends to increase and the more likely it is that it will be linked to a formal strategic planning and budgeting process (theme 8, section 4.10). All forms of collaborative working (partnerships, project-based work, informal collaboration) tend to contain some competitive elements, which can be significant (section 4.9.7). Passion and commitment to organizational core purpose can intensify tensions between organizations and this can be exacerbated by human factors (individual personalities, leadership styles, issues of power and control and so on), for example, interviews 10, 21, 32, 37):

“It’s the connectivity with specific aspects of nature that makes us passionate and those passions can lead to very positive outcomes and they [*can*] make organizations and individuals ... incredibly driven ... but they can also ... lead to a bit of short sightedness ... almost putting on the blinkers and ... always looking at things from a particular perspective and not from a way in which other people value the habitat or nature as a whole” (interview 32).

4.9.7 We compete as well as collaborate

Participants stressed the value of collaborative working, including partnerships and project-based work (theme 7, section 4.9). However, they also acknowledged that the environmental sector is characterised by an element of competition that inhibits collaboration with other external organizations:

“We conservationists are our own worst enemies. We bicker and we fight and we bitch and we compete and... we have vested interests and keep playing the card game with some cards hidden so other conservationists can’t see it, we have agendas” (interview 9).

“Challenge, conflict and competition ... you say one thing and you do another” (BW3) ... “we are constantly in conflict with ourselves ... we are full of contradictions ... it’s a fundamental thing to hold these contradictions” (BW1) (group event 33, participant observation).

This was echoed by other participants (for example, interviews 32, 37). Where does this sense of competitiveness come from? Several participants acknowledged that conservation-based charities were sensitive to others entering their space, the passion and commitment that people in the field feel for their work can make them protective due to a feeling of ownership over their territory:

“Because things are getting so tight now in terms of funding, there is a level of almost competitiveness and it’s putting barriers up between different organizations ... the things that people are particularly passionate about can get in the way and ... people do occasionally have a difficulty of looking at things from other perspectives and that can often hinder partnership work. That’s something we have to be particularly careful of as we work in a very specific, targeted organization ... there can almost be a sense of ownership as well in that charities and organizations have a sensitive individuality and this is what we do, and this is our focus and we don’t want anybody else to do anything similar. This is going to be what makes us stand out and attract people, when really there should be more of an open dynamic between organizations, sharing resources and strategies, because at the end of the day, we all have a shared goal” (interview 32).

There were also differences of opinion between participants on ecological and scientific approaches, specific areas where scientific methodology and/or understanding is subject to multiple interpretations (for example, animal sentience, invasive species and rewilding issues), which potentially cause conflict internally or between environmental organizations. This includes subjects such as whether an animal is important in its own right as an individual (interview 5) or whether the survival of a species as a population is a more important criteria (interview 9). In other words, weighing the sanctity and sometimes sentience, of the individual against the greater good of the species as a whole. There are also philosophical differences between participants on topics such the wisdom of seeking to control the natural world to correct imbalances (for example, invasive species) and around the sanctity of the scientific process itself (interview 16) and the extent to which those working in conservation and animal welfare should practice veganism and/or vegetarianism (interviews 29 and 31). There are no simple answers to these dilemmas.

4.9.8 Key linkages

As purpose driven organizations, which share common values including a strong connection with the natural world (themes 2 to 3, sections 4.13 to 4.14), participant organizations reach out and engage people outside the organization to create extended communities of interest to act collectively and make a difference (themes 4 to 5, sections 4.15 to 4.16; research question 3, section 4.11). This provides long term and consistent funding and attracts significant resources at relatively low cost. Effective strategic planning and financial systems underpin financial viability and sustainability through further funding opportunities, improved resource allocation and more effective working practices (theme 8, section 4.10). Together these components significantly leverage organizational resources helping them to achieve their core purpose, mission and vision (research question 2, section 4.8).

Although many forms of collaborative working are directly linked to funding needs and, in larger participating organizations, are also linked to the formal strategic planning systems including the prioritisation of objectives (theme 8, section 4.10), they are driven by organizational purpose, mission and shared values, using the proxies of fundamentals or guiding principles in daily practice (theme 6, strategic thinking; research question 1, section 4.5). This enables the organizations to reach out to engage, interact with and tap into these extended communities of interest. This is further enhanced by the ability of the participant organizations to speak different languages to multiple stakeholders; acknowledging the inherent value of nature within their extended communities whilst focusing on extrinsic value externally (themes 1 to 5, sections 4.12 to 4.16) and holding the tensions and conflicts that arise as

a result (theme 9, section 4.7).

4.10 Theme 8: Effective strategic and financial planning

How do we manage our organization (3 of 3)? We prioritise effective strategic and financial planning and management.

We rely on effective strategic and financial planning systems to ensure that we can meet our core purpose, maintain healthy and consistent funding streams and long-term financial sustainability and/or survival, allocate resources efficiently and deliver our frontline services effectively. Our strategic and operational decisions are also affected by other aspects, such as the power and control of individuals, the continuing influence of founders, personal and family interests, business succession and so on, which results in each participating organization having a unique culture as well as exhibiting common themes and ways of managing their endeavours.

The participant data underlying this theme is broad and extensive. This theme is related closely to themes 6 to 9 and is referenced where appropriate to avoid undue repetition (particularly with regard to the theoretical context) and integrate the themes more fully.

4.10.1 The narrative

Most participant organizations placed a strong emphasis on traditional strategic and business planning processes (formal or informal), which underpin financial sustainability and operational effectiveness and integrate the long term elements of the planning process (mission, vision and purpose) and the short-term components (identification and prioritisation of objectives). Planning and financial systems are closely tied to the achievement of organizational purpose and sometimes (particularly in smaller organizations) are born out of necessity rather than desire. They are also sometimes rigorously applied:

“We set up budgets at the beginning of every financial year ... we spend the best part of three months actually grinding [out] the figures about what we can achieve and what we can't achieve and what our aspirations are ... and, being realistic. And the budgets are then set and they are very, very, very detailed in every single department and those ... become the bible of actually guiding us during the course of the year ... [that's] the way that the business works. Then the actual execution of that goes into a routine and it's an absolute routine that happens year after year, week after week, day after day” (interview 18, researcher italics).

Participant organizations navigate strategically through fundamentals, first or guiding principles, which are closely linked to the organization's core purpose and deeply held value systems and act as proxy for strategic thinking (theme 6, section 4.6) and enable the participants to engage with extended communities of interest (theme 7, section 4.9), including members, volunteers and other communities. These relationships underpin their financial viability and sustainability over the long term. This is, however, rarely enough to guarantee day-to-day financial viability and/or sustainability.

Accordingly, most of the participant organizations rely on effective strategic and financial planning processes in order to secure ongoing funding, prioritise objectives and communicate with the outside

world in a language it understands, one which emphasises cognitive, analytical thinking, evidence-based principles and scientific methodology in conservation and has a predominantly extrinsic valuation of the natural world. Larger participants have formalised strategic planning processes and they are characterised by open and inclusive processes, both internally and often including external communities of interest:

“We will have three or four workshops where we then throw all of that ... to our staff, and pool them for ideas, their views of where we should be going, and then we have further workshops in which all of the trustees are pulled in and we look at [*that*] and then ... senior managers will take that away and write up relevant parts of that strategy and it then goes back through [*the*] approval process” (interview 30).

“We do have a strategy, that has been developed with inputs across the organization, calling from our staff as well as our volunteers and our members, to get inputs from them as to what we should be doing or what they would like to see” (interview 28).

“We’re all encouraged to, all members of staff, or even long-standing volunteers are encouraged to have an input, if they’ve got an idea to share it ... there [*are*] structured methods ... but most of the time it’s like a continuous conversation ... a fluid process” (interview 32).

Participants widely endorsed the necessity of a strategic planning process, as a necessary tool to operationalize strategy, ensure the effective use of resources and prioritise objectives, whether this was formal or informal, or by necessity rather than desire. Indeed, when participants talked about strategy in general it was strategic planning process that they most often had in mind. On the other hand, participants saw strategic thinking (rarely mentioned by name) primarily as a way of thinking, one that allowed them to make better, more measured, more holistic decisions about the fundamentals, what the organization is all about (theme 6, section 4.6).

Participants saw *both* processes as critical to organizational success, and they were interconnected and embedded within the participants’ broader strategic processes (Mintzberg, 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012). They were “distinct, but interrelated and complementary thought processes” (Heracleous, 1998, p.482; Mintzberg, 1994) and loosely and often informally coordinated rather than formally integrated (theme 9, section 4.7). The strategic processes that have emerged are contextual. This is evaluated in detail in section 4.5.7.

When participants talked about what they actually *did* when making decisions they were often much more closely aligned to Mintzberg’s view of strategy as an emergent rather than a deliberate process (Mintzberg, 1987a, 1987b, 1994) and more in the form of a craft rather than a pre-determined process (the metaphor of a potter at work, Mintzberg 1987b). Mintzberg’s ideas on strategy as pattern, a stream of actions, or a ploy as *well* as a planning mechanism (Mintzberg 1987a) were strongly represented. Although most did not use academic terminology they talked about strategy in down-to-earth terms as a fluid process (Mintzberg, 1987b), linked to commitment (Mintzberg, 1987b; Mintzberg *et al.*, 1998), mindset and intuition (Mintzberg, 1994), creativity and sometimes opportunism (Liedtka, 1998b). In short, participants believed that strategic planning played a key role in meeting their core purpose and maintaining financial sustainability and survival, but adapted these processes to be more open (extending the influence of internal and external communities of interest) whilst sometimes rejecting the perceived overly analytical focus of traditional strategy:

“Well, I’ve done business models that have specific objectives and targets ... with milestones set etc. etc., and with the best will in the world, in this business ... when you’re reliant on other people as well, it’s hard work maintaining that sort of rigidity. So, one of the ideas of [*the organization*] ... was let’s not burden ourselves with that rigidity, let’s just take [*it*] as we can. And we do have targets, we do have objectives obviously but we’re not necessarily putting the pressure on ourselves as we have done with previous projects” (interview 10).

“I haven’t got much time for the corporate traditional model ... that’s been put on to charities. Although I know I can use that model, and then see what that model could do, I would never strictly apply it in a charity context because I don’t think it helps and I’ve been in meetings ... and thought, ‘wow’, we’re just wasting our time talking about meanings of words now, we’re not really talking about what we’re here to do. And we need to focus on what we’re here to do because that’s all about change” (interview 35).

This adaption of the strategic planning process is based on the nature of participant organizations as purpose driven (theme 6, section 4.6; themes 1 to 5, sections 4.12 to 4.16; research question 3, section 4.11). They navigate through strategic fundamentals which are closely aligned to purpose and key values but also need to communicate with the outside world (funders, policy makers) in a language that is understood, which is primarily cognitive, analytical and is often evidence-based. As a result, there is a fluidity to the strategic processes in participating organizations, which reflects the views of Mintzberg (1998) of a process where thoughts and actions sometimes come together as one process:

“There are times when thought should precede action, and guide it ... Other times, however, especially during or immediately after major unexpected shifts in the environment, thought must be so bound up in action that ‘learning’ becomes a better notion than ‘designing’ for what has to happen. And then, perhaps, most common are a whole range of possibilities in between, where thought and action respond to each other” (Mintzberg et al., 1998, p.42).

“The decision-making process is complex ... and it really is done on a case-by-case basis” (interview 10).

Participant organizations are purpose driven and operate in multiple domains, working together with like-minded individuals, groups and organizations who share their broader perspectives and connection with nature, and with those in the outside world through a more traditional business modality, supported by analytical business processes. The inclusivity of the strategic planning system (sometimes using formal consultative processes in the larger organizations, informally in smaller organizations) is one way in which participant organizations hold and resolve the conflicts that arise from serving different stakeholders with very different worldviews and perspectives on the natural world (theme 1, section 4.12; theme 6, section 4.6; theme 9, section 4.7).

Both executive and non-executive teams (trustees) are critical to strategic decision-making (Drucker, 1989; BoardSource, 2005), although the balance of power and control varies considerably between the participating organizations (sections 4.10.7). The interplay between these functions is often the place where reflective thinking and debate on strategic issues takes place, the equivalent to a strategic thinking process (theme 6, section 4.6).

4.10.2 Strategic and financial planning processes

Almost all the participant organizations (particularly the larger ones) stressed the critical importance of some form of strategic planning and financial process, either formally (in the case of larger participants, which typically had a longer-term planning process) or informally (the integration of key financial and planning principles within the management process to secure funding, prioritise objectives, ensure the effective allocation of resources and so on). This overt acknowledgement of the value of some form of strategic and financial planning was in marked contrast to strategic thinking which was acknowledged formally by very few participants (theme 6, section 4.6.1).

Participating organizations adapt their strategic and financial purpose to suit their needs, culture, purpose and size and although there are common denominators in terms of approach (examples in section 4.10.3) there was also considerable diversity in practice adopted. Some participants consciously avoided a planning approach that was too analytical, a significant number adopted broad and inclusive consultative processes within the domain of strategic planning and budgeting (theme 9, section 4.7.7) and those that were small adopted informal rather than formal processes. (sections 4.10.4 to 4.10.5).

Consistent, stable funding is key to achieving core purpose and effective day-to-day implementation. Participants placed a high value on the (formal or informal) planning and financial processes that underpinned their ability to attract adequate funding to ensure financial viability and sustainability. For smaller organizations, in particular, funding governs survival. The importance of ensuring stable funding is increased by charitable rules for reserves, tied funding and the difficulty of attracting funds for ongoing maintenance and administrative costs. Reliable long-term funding is essential to avoid the dangers of over-reliance on revolving short-term financing (section 4.6.8; section 4.10.4). In short, for small and medium-sized environmental organizations funding *is* survival. For some participants the strategic planning process was strongly analytical and included a detailed budgeting process, which included weekly and monthly meetings to monitor whether the organization was on track (for example, interviews 12, 14, 15, 18):

“Most decisions that people have to make day-to-day ... are ultimately driven by the budget”
(interview 14).

Many of the larger participants incorporated broad, inclusive, consultative processes, which integrated key stakeholders (communities of interest), into the formal strategic planning process (theme 7, section 4.9; theme 9, section 4.7). This brings together elements of two parallel processes, which traditionally have different roots; the strategic planning process, which is cognitive and analytical and the nature of purpose driven organizations, which is relational and community based. Any clashes that occur between the different underlying modalities are resolved or held at points where these two processes come together and/or are integrated into the other key strategic processes, including governance (theme 9, section 4.7). This enables the participating organizations to resolve, or simply hold, the conflicts that arise from serving the needs and perspectives of different stakeholders (theme 6, section 4.6.8 and theme 9, section 4.7).

Whilst all participants agreed that strategic and financial planning played an important role in ensuring financial viability, effective resource allocation, sustainability and survival, responses were varied in terms

of approach, emphasis and diversity. Some participants did not like more formal, conventional strategic and business planning processes (or simply had insufficient resources or were too small to implement them), often placing a strong emphasis on doing and action (interviews 5, 6, 16, 27, 29, 35, 36 and group interview 34) or consciously adopted a less analytical, cognitive approach (interviews 10 and 11). Nevertheless, all participants linked funding directly to survival and all were cognizant of the need to communicate with external stakeholders in a language that they understood. At the same time, they also craved to be understood by the outside world, to generate a greater comprehension of why what they do each day is so important to them (themes 1 to 5, sections 4.12 to 4.16, research question 3, section 4.11).

The following sections explore the strategic and financial planning processes of participants in more detail by providing practical examples of participant processes (section 4.10.3), looking at the importance of funding in terms of organizational survival (section 4.10.4), the specific issues of smaller participant organizations (section 4.10.5), the importance of the relationship between the executive and non-executive functions (section 4.10.6) and the practical dynamics of management (section 4.10.7).

4.10.3 Practical participant examples

The strategic planning process within participating organizations is best illustrated by example. The discussion below is based on three detailed participant organizations (interviews 18, 30, 35) supplemented by others that include smaller participants, which rely on more informal processes. In all cases, strategic and financial planning processes are closely integrated with the organization's core purpose, mission and key objectives and linked to tangible outcomes (implementation). It is often within these linkages, formal or informal, that the participants practice the *equivalency* of a strategic thinking process, particularly in the context of long-term decisions (theme 6, section 4.6) thus partially integrating the two processes. Despite different individual approaches to strategic planning there were underlying themes that were common to all the participants.

Some participants had long, sometimes very long-term planning horizons, up to 250 years (interview 11, section 4.6.6). As one participant put it, "everything is long term" (interview 18). On the other hand, many of the smaller organizations had short-term planning horizons (normally a year, but in some cases, less, where day-to-day survival was a key issue). However, short term horizons did not imply paucity in vision or mission, these organizations often had the capability to think big even when survival was a day-to-day issue.

Larger organizations had more formalised strategic planning processes, linked back to the purpose and aim(s) of the organization, often using proxies such as fundamentals and/or organizational guidelines for strategic thinking (interviews 14, 15; theme 6, section 4.6). These strategic processes linked long-term strategic direction with short term objectives, priorities and operational implementation (interviews 28, 30, 35). Organizational size affected the level of formalisation of the strategic planning process, which changed as the organization grew:

“it’s gone from being a shoestring, homespun, hand-knitted organization through an intermediate period where it grew quite quickly, then into a period, which I would largely describe as professionalization and consolidation, where it started to build its internal processes, internal structures and so on, to match what it had acquired in terms of liabilities and responsibilities ... [Decisions are now] made in a very conventional way. You have a high-level strategy, you have operating plans, departmental and individual work plans, property management plans and, by and large, most decisions that people have to make day-to-day are made within the context of that hierarchy and are ultimately driven by the budget. It’s relatively straightforward for most day-to-day decisions” (interview 14).

This strategic planning process is centred on the clarification and prioritisation of objectives that are linked back to the organization’s core purpose and mission, moving from informal “homespun” rules to more formal organizational systems over time. Other participants were at different stages in the same process. Underlying participant descriptions was an acknowledgement of the importance of effectiveness and efficiency as essential prerequisites for achieving core purpose. Smaller organizations often expressed this in terms of being ‘well run’ and managed, spending money on purpose and not on administration and back office expense:

“Well managed and well administered systems are vital ... we try to make the admin slice as small as possible” (BW3, group interview 33).

Some participants provided long, very rich descriptions of their strategic and financial planning processes (interviews 12, 14, 15, 18, 19, 28, 30, 32, 35). These were linked to their core purpose, vision and mission, identified and prioritised key objectives and ensured that operational processes were as effective and efficient as possible, thus integrating long term and short-term elements of the planning process (for example, interviews 28, 30, 32, 34, 37). Some participants had broad formal consultative processes that included key stakeholders/communities of interest within the strategic process (interviews 28, 30, 32, 34, 35, 37; theme 9, section 4.7) and this openness was echoed by other (smaller) participants in a more informal context, for example, interviews 10, 32 and interview 27 (section 4.10.5). Some organizations had detailed budgeting and financial systems, supporting the achievement of key objectives and ensuring effective and efficient processes, for example, interviews 12, 14, 15, 28. For all participants the process involved assessing the reality of plans, sense-checking data, evaluating funding needs and ensuring a sustainable future.

Although there are many common denominators in the use of strategic and financial planning processes amongst participants there was also a wide variety of processes, adapted to the particular needs, culture and size of the organizations, which differ in terms of size, formality, inclusivity, the degree of analytical rigour involved and management style. By far the most common perspective is that strategic planning processes are an essential means to an end (tied directly to core purpose), offer essential benefits, particularly in terms of communicating with funders and other third parties, and assist resource allocation and effectiveness. In addition, both executive and non-executive functions within participating organizations play a key role in strategic decision-making but power and control within the decision-making process differs widely (sections 4.10.6 and 4.10.7).

At the same time, participants tend to consider strategic and financial planning necessary rather than inherently desirable, perhaps because they are sometimes associated too closely with profit-oriented

commercial businesses. For participants, they are a necessary enabler for deeper purpose (interview 10, section 4.10.1). For all participants, achieving organizational purpose remains key and there was often a strong bias towards action and actually *doing* things. Practical action is important to participants (theme 5, section 4.16), particularly in smaller organizations, where flexibility and adaptability is key, reflecting funding uncertainties. As a result, smaller participating organizations use more informal processes designed to help them manage their concerns effectively, remain financially viable and sustainable, assist in obtaining funding and to prioritize their objectives. For smaller participants obtaining consistent, reliable funding that enables them to achieve their key purpose without undue restrictions is critical (section 4.10.5).

4.10.4 Funding and survival

Funding is key to the survival and success of participant organizations, particularly the smaller ones. Participant organizations tend to have low reserves and are vulnerable to changes in funding. This is exacerbated by minimum reserve rules for charities (for example, interviews 30 and 34) and the nature of project-led funding, which is sometimes restricted, thus taking it out of the unrestricted reserves pot.

The reserves in charitable organizations (measured in weeks or months of maintaining operations with no funding) are often low, sometimes very low, increasing financial vulnerability. In addition, there can be a mismatch between long term needs and short-term funding streams and a concomitant danger of over-reliance on using revolving short-term financing for long term projects. For some staff, short-term project funding covers their salary so they lose their job (and the organization loses their accumulated capabilities and experience) if their costs cannot be rolled over into a new funding pot when the current one expires.

Funding bodies are keener on new projects or capital projects than funding ongoing project costs, administration costs or providing contingencies to cover unforeseen events (or allow organizations to switch funding between different elements of a project or between different partners on collaborative projects). Participants often spoke of the vagaries of government funding, seeing it as susceptible to swings in fashion and feeling the need to sometimes ‘lean in’ to current government priorities and adjust the emphasis of funding bids accordingly. This is an important element in the change of emphasis of some environmental organizations from being nature-based to nature *and* people-based organizations (theme 4, section 4.15), since “funding sources are all about people” (interview 17). Much of the work done by small environmental organizations is relatively routine and not at the forefront of the attention of traditional funders, in other words not exciting enough to attract funding:

“Fundamentally a lot of what we do does not lend itself well to novelty and regular change. We’re actually about building incrementally on what we’ve already learned as practitioners, about that gradual building up over time, and the fact that that type of work actually is quite difficult to support. The funding question is significant. How do you continue to fund important, ongoing work, that isn’t necessarily, always turning up novelty?” (BW3, group interview 33).

“It would be nice to not have to keep searching around all the time just to cover your costs wouldn’t it. And certainly, and I think it goes for much of our sector, we really struggle to cover non project costs, the core organization costs, finding ways to do it because there are very few

bodies, people out there who want to give for that. They want to give to see something specific happening in a certain space on the ground and so forth so... *[it is]* a real struggle to find that money to cover your core organizational costs. It'd be really nice if there were other ways of doing it, which, perhaps, wouldn't take up so much of our time and energy and efforts as well" (DW5, group interview 34).

Legacies and other forms of longer-term finance are key to environmental organizations to help stabilise their funding streams. However, small and medium-sized environmental organizations can find it hard to attract this funding (since they compete directly with the very large NGOs and national charities).

Attracting a significant sum from a donor can make a very significant difference to these organizations, particularly small organizations, where it might be the difference between surviving and not surviving. One participant (interview 11) related an instance where (s)he received a phone call from a potential donor out of the blue who donated a very substantial gift because (s)he identified with the core purpose of the organization and it fitted his/her criteria for donating the money, based on the organization's web site. Sadly, such beneficial serendipity cannot be relied upon!

Short term funding in the environmental sector is increasingly project led (interview 17). This is one reason why small and medium-sized charities increasingly need to collaborate on projects with other organizations that share a common interest (theme 7, section 4.9). In addition, short-term project funding can be very short term indeed:

"[This project] gets five years funding. That is so unusual. We normally get three years ... we went through a period, five or six years ago, when we wouldn't get funding for more than 12 months" (interview 21, researcher italics).

"No, oh no, no... no, no, no... the grant world, grant world is not fair. Oh no, grant world is... I'm sorry! ... Funding will run out. Yeah, so it's a reality, it's definitely a reality. I've had a great run. How many other scientists have worked for small organizations and hung on for a couple of decades? You don't hear of it" (interview 9).

As a result, for smaller organizations funding is often a day-to-day issue that has a very significant impact on operational as well as strategic decisions. It is hard for small organizations to gain traction, establishing momentum can take a long time:

"When I started there were two of us and now there are 28 and so we managed to really slowly build the organization ... I mean, things like staying in that awful office ... It was a terrible office but it wasn't costing us much ... just trying to reduce our admin as much as possible ... then, once we had a capital reserve we were able to start investing in more core funded staff and ... fundraising communication, all these things that *[are]* absolutely vital for the success of the organization, and for years we just had nothing ... certainly that investment in the last five years has resulted in far better grant acquisition and a far wider range of grants that we can attract' (interview 7).

"[The] primary reason for not taking animals in ... is usually because we haven't got facilities available, so either we're full ... or we do not have the facilities" (interview 29, researcher italics).

In short, funding determines resources, which directly affects the ability of participant organizations to make a difference by pursuing their purpose. This results in a tension between staying on course (achieving key objectives) and simply meeting the funding needs for day-to-day survival, which goes to the heart of the strategic processes within the participating organizations (particularly the small ones). There is always the temptation to tap into available funding that may be tied to multiple objectives, not all

of which are aligned to the specific remit of the organization (a form of chasing the available funding):

“The answer [*to this potential funder*] was, ‘no’. We don’t run training schemes. That’s not what we do. But we employ people and we can do day release or part time release or we could take sandwich students ... we could be that vehicle for that genuine experience and do it in a different way” (interview 14, researcher italics).

“You can’t live off capital, you’ve got to live off revenue... [*to ensure that*] ... revenue meets expenditure... simple as that... [*but core purpose*], it’s absolutely critical ... you’ve got to be sensitive enough to know what is right for [*the organization*] and what isn’t right” (interview 18).

“[*We take a*] ‘business-like approach ... although we’re a charity ... providing visitors with a unique quality experience ... and ... delivering great quality experiences, but also inspiring people about wildlife and doing what I would call the missionary work, so that we’re not targeting at people that are already committed to wildlife and the environment but trying to reach a mass audience, so we market the place as a fun family day out. We do that for two reasons. One, it helps our charitable objectives in terms of reaching a wide audience and if we were too targeted it would be financial suicide in any case. So, it’s important that we have the mass appeal that we need. We’re open 364 days a year so seasonality is a bit of a challenge for us as are the finances” (interview 19).

In all these examples, organizational purpose remains paramount whilst securing sustainable finance is always top of mind. Those participants who also ran visitor or specialist centres, reserves and gardens, or ran volunteering, training or member events (almost all of the participants) also needed to ensure that their customers, staff and communities went away happy. For visitor attractions this is the equivalent of running a business in its own right! Nevertheless, all participants were strongly purpose driven; at the very centre, the core, of their organizations lies core purpose and/or mission. This is the heart of what they do. This creates tensions within the organizations and resolving these tensions is critical to organizational success (theme 9, section 4.7).

Funding is critical to all the participating organizations. However, its impact can vary according to size. The formal strategic planning process in larger participant organizations is the place where organizational purpose and/or mission is translated into objectives, priorities are established (and matched to resources available) and a viable and sustainable financial base (capable of supporting long-term purpose and short term activities) is established. For smaller organizations, funding is a day-to-day priority and concern and they operate informal processes (meetings, networking, collaboration) that address their key strategic and financial needs, those that enable the organization to survive and fight their cause for another day:

“It causes an awful lot of sleepless nights ... I don’t think the public realize that ... [*that*] this is a very complicated process that we go through to decide whether we can help them or not. I think they just see us as going, ‘oh well, you’ve got *that* animal and we don’t want *that* animal’ so we’ll say, ‘no’. They don’t think ... have they got space, have they got facilities, have they got the resources, have they got a vet that knows that species [*so*] that it can [*be*] looked after? Have they got appropriate long-term housing? Where can we re-home it to once it’s rehabilitated?’ We have to think all the way down the line, not just the immediate” (interview 29).

This description of an informal decision-making process, although couched in everyday language, shows an understanding of the need to think long term (“all the way down the line”) and ensure short term survival, the ability to live within your means (to say “no” when appropriate) and a sense of keeping organizational boundaries aligned to resource restrictions. In other words, it covers all the important

aspects of a strategic planning process!

4.10.5 Formal and informal processes: Does size matter?

Smaller participant organizations had less formalised strategic processes, which was often linked to the priority placed on survival. In addition, they were multi-taskers; fulfilling many decision-making roles simultaneously:

“*[In the early days]* it was survival half the time, survival and just doing the best we can ... How do you prioritise? ... it's just trying to focus on what will make a difference ... we weren't very great strategic thinkers and it's only in the last ... five years that that's started to come to the fore” (interview 7).

“I struggle to make sure I'm wearing the right hat because I have several different roles really, which are all various levels of strategy ... in some [*charities*] you might have your aims and objectives and you go through them ... we don't really do that” (interview 27).

Although the process above was not formal the participant confirmed that the team had regular meetings to look at important issues and prioritise and monitor the work of the charity. The reality for smaller participants is the ubiquity of multi-tasking; a founder or small team can be negotiating for critical funding in the morning (to underwrite its bills tomorrow) but mucking out the animal rescue pens in the afternoon and taking emergency calls in the middle of the night.

As a result, smaller organizations tended to describe strategic and financial planning in terms of being well run and managed, being efficient and effective and spending funds directly on purpose rather than administration wherever possible. Participants sometimes talked about strategy in general, rather vague, terms, suggesting that they could learn to be more effective (interviews 15, 27), particularly to attract funding and manage resources effectively:

“Not [*being*] seen as [*offering*] good value for money” (BW7) ... “[*coping with*] the boring back office, which nobody wants to fund presents a very real problem” (BW8) ... “[*larger NGO's*] have no idea of resources ... they just don't get it” (BW7) (Group workshop 33, participant observation, researcher italics).

In short, smaller participants felt that they lacked the clout, scale and size to influence external funders and policy makers. Participants used a metaphor of being on a small boat at sea:

“*[We're in]* a little ship, and you're managing to sail, and you come across something that starts to sap up all your time and effort, it's really hard to keep your ship going because you end up just stuck” (BW6) ... “That sense of being constantly, not at the mercy of, but fighting the elements ... so it's not just that you are in a small ship on the high sea but ... you're fire-fighting all the time as well, which is a pretty [*awful*] combination ... there is a sense of that, just because of the sheer range of [*problems*]” (BW3) (group interview 33).

Nevertheless, many of the smaller participants preferred being small as they felt it offered opportunity as well as challenge, allowing them to be more flexible, opportunistic and adaptable than bigger organizations and retain a practical, hands-on focus. They viewed being small as a doubled-edged sword:

“We all come from the same kind of hands on role but we have to understand that the way decision are made... the range of voices and influences... are so different from [*the way that we work*]. How much leverage do I have with a sector that thinks differently? ... it's really challenging ... what motivates those decisions is not what motivates us” (PW3, group interview and workshop 33).

What ties this all together is the passion that participants have for making a difference in their chosen field, their core purpose (themes 4 and 5, sections 4.15 to 4.16). During the interview process it was noticeable that participants invariably linked the strategic process back to their deep connection with nature and/or the purpose of the organization. In short, despite a diversity of processes, there was a common intent (theme 6, section 4.6.6):

“Our generation ... has deprived that experience [*keeping older trees living within forest communities*] ... for human generations for hundreds, thousands of years. That is the shocking state of what we're doing” (interview 11).

“It sounds a bit pretentious to say it's my lifetime work ... but that's how I see it” (interview 10).

This link with core purpose and a history of working for relatively little reward is key in smaller participant organizations. The strong connection to purpose and deeply held values (the ‘fundamentals’) feeds into why the participants do what they do, both in the discussion on strategic thinking (theme 6, section 4.6) and to the relational foundation of the strategic process (themes 1 to 5, sections 4.12 to 4.16). Smaller participating organizations, formally or more often informally, acknowledged the need to prioritise projects and day-to-day activities because funding is often very tight and resources are limited. The participants' passion for what they do and the continual need for funding were in constant play, determining what the organization is able to do and what it is *not* able to do. So it is critical to use funds effectively:

“A lot of our work is driven by our ... our interests and our passion for [*our core purpose*] but we also always try to ensure that ... we have scientific evidence to make sure that what we're aiming for is valid and there is evidence of a need for it, because obviously we are a small organization, so we do have limited funds and ... we can't just do what we want [*laughs*]. Unfortunately ... even if there is something we really want to do and are really passionate about, you have to make sure that you are using your funds as efficiently as possible” (participant 32).

“You have to be aware of the wider picture and you've got to be clear about what you can do ... [*but*] you've got to be realistic about what you can achieve, and in a small organization there's loads of things you want to do, but you've got to prioritise and focus ... which is difficult ... especially when you are so low on resources as we all are ... it's a bit of a struggle” (interview 36).

Most comments on being small were a simple acknowledgement of resource limitations but in the context of less bureaucracy, more flexibility and adaptability, often made as a favourable comparison with large NGOs and charitable organizations. Smaller participants felt that they were closer to core purpose than larger organizations and this was important to them. One participant quoted Margaret Mead (American cultural anthropologist, 1901-1978) in this regard:

“Never doubt that a small group of committed people can change the world ... indeed it is the only thing that ever has” (PW3, group workshop 33).

These comments reflect the marked bifurcation in the environmental sector in the UK between the large NGOs, such as the National Trust (5.6 million members) and RSPB (1.2 million members) (chapter 3,

section 3.8.4) and the small and medium-sized organizations, which are the focus of this research study.

4.10.6 Executive and non-executive teams

Trustees play a key role in strategic management in the participating organizations. This section focuses on their role within the more formal strategic planning process and complements the broader discussion on the importance of the relationship between the executive and non-executive teams in the strategic thinking process and in holding, and potentially resolving, conflicts and tensions that arise within participating organizations (theme 9, section 4.7.4).

The division of responsibility for strategic decision-making between the trustees and the executive team varies between participants. In some participant organizations, the executive team, (chief executive, founder, key members of the team) played a major role in strategic decision-making (interviews 11, 12, 18, 20 to 26) with the trustees taking a more overseeing role. In other organizations, the trustees played the dominant strategic role (interviews 12, 14, 15, 19, 29, 32) or the role was shared more equally (interviews 7, 17, 35). Smaller organizations had more informal, fluid governance processes, where the founder or core team often played the dominant role with input from trustees (most often the Chair) when appropriate.

Most of the participants described a governance process in which the executive and non-executive teams worked together to ensure that the organization was focused on core purpose and acted in accordance with its key values, in the most effective manner. In most cases, not all, the trustees played an overseeing, custodial role and the executive team was tasked with implementing operational strategy. However, the balance of power and decision-making responsibility varied according to organizational size, culture, history and the presence of dominant personalities (Founders, Chief Executives, individual trustees). Sometimes, trustees were more deeply involved in operational matters (interviews 14, 15, 32). A few organizations had a partly 'democratic' governance process (Low, 2006), one in which trustees represented the interests of specific stakeholders or played a key role in ensuring that the needs of multiple stakeholders were met (interview 30) but the dominant role was stewardship, focused on core values and purpose (rather than the agency model prevalent in commercial organizations focused on profitability).

In participant organizations with a dominant non-executive role, trustees monitored, and often set, the policy of the organization and left the executive team to implement it. This was more often the case in membership organizations where the members elected the trustees. Generally, the trustees took the lead in matters relating to the strategic direction of the organization (ensuring that it was aligned with the purpose, vision and mission and interpreting the charitable purpose in key decision-making areas) and the executive team translated this into a detailed strategy, which they then executed.

Some trustees involved themselves in operational matters, and even individual projects or activities, to make sure there was no 'mission creep', where available funding opportunities might lead the organization into areas that are not in accord with its overall purpose. In some participant organizations

the trustees can require the executive management team to evidence recommended decisions to written policy documents or guiding principles before they are willing to sign off on the strategy or activity (interviews 14, 15, 19). In others they may suggest new priorities, strategies or ideas for the executive team to implement, unless they can be convinced that the suggestions are inappropriate or not easily implemented (interview 17). Sometimes, in smaller organizations, trustees and the executive work together as a team (interview 13).

Participants mentioned that trustees do sometimes say 'no' based on their own interpretation of the purpose and remit of the organization. This again demonstrates that, for many participants, it was the trustees who clearly assumed the custodial role for the organization's core purpose and long-term strategic decision-making process (direction, scope and alignment with charitable objectives), whilst the executive (or senior leadership) team managed the strategic planning process, implemented decisions at an operational level and pursued activities that followed well-trodden pathways that are clearly within the scope of the organization ('business as usual'). In most cases, but not always, operational matters are left to the executive and/or management team:

"In terms of strategic direction that obviously comes from a Board of trustees, so we've got the Charity Board and then there's a subsidiary trading company with another Board ... which is more looking at the financial aspect. But strategic direction and achieving charitable objectives is from the Board ... they're not dealing with day-to-day issues but they will agree things like the budgets that are presented annually etc." (interview 19).

"We couldn't make those [*large strategic*] decisions without going up the trustees and wouldn't dream of trying to do so ... [*and*] some ... decisions will have to go up to the trustees ... there's actually some quite nitty-gritty decisions have to go up to the trustees but they have to sign off the policy documents, by and large, they don't have to sign off the implementation documents and I think that's a distinction I would make ... they set the policy and leave the executive to actually work out the implementation" (interview 14).

"Trustees are elected by the members, and so they are responsible for the strategic direction of the [*organization*] ... [*but*] at the level of projects, sometimes they just happen" (interview 15).

"It's major things that would have an impact [*that go before the Trustees*]" (interview 19).

In practice, trustees were often also involved with coordinating and facilitating the strategic process, approving the setting and prioritization of organizational objectives, as well as a multitude of specific supportive roles (mentoring and supporting the executive and staff teams, recruitment of executives, networking, exploring collaborative work, resourcing the staff team and specialist roles relating to research and scientific/technical support). Trustees were often multi-taskers, particularly in the smaller organizations, moving from 'big picture' strategic decisions to the nitty gritty of operational matters, particularly in the formative years of organizational life:

"All of [*the trustees*] have different areas of experience. A lot of them have been working in ecology for a long time and ... conservation for a quite a while or have other areas of expertise, which they bring to the [*the organization*] ... they're the solid blocks of the organization ... they are more stable ... so they are important in the longevity of the [*organization*] and a lot of them are doing it from a very deep passion. They've dedicated their lives to [*the core purpose/species*] so they are ... the foundation ... and they are seeking to progress [*it*] and carry it forward ... all have different roles within the organization ... [*they look after*] the general overseeing of the organization, ensuring that its fundamental functions are carried out and ensuring that other members ... have the support and resources available to them [*that*] they require, whether it's

paid staff or volunteers” (interview 32).

There were, however, exceptions. Some participant organizations had powerful executive or founder figures, a founder culture, strong individuals within the executive team, or were smaller organizations in the early stages of development, with specific individuals playing a more dominant role. In these the executive team, or founder(s), were more actively involved in long term strategic decision making (leading the organization) and the power of trustees was tempered (section 4.10.7). However, even in these cases the trustees often still played an active role (governance and guardianship of mission, vision and purpose) and there tended to be a balance of responsibilities in strategic decision-making, albeit sometimes weighted towards the executive function:

“[*The Chief Executive*] believes in it very strongly so there has been a lead from the CEO ... the strategy of the [*organization*] comes from the SLT [*senior leadership team, the executive team*] and trustees” (interview 26).

“[*The organization*] took off because of the appointment of the Chief Executive ... who basically has driven the organization since then” (interview 21).

“One area to just mention is personality. So, we can have these great strategic views and overviews and things like that and you could have a Chief Exec or a Finance Director, or someone like that, who just says ‘no’, or suddenly has a burning passion ... and that becomes something they want the organization to do ... there’s a balance there because ... part of the reason people employ a Chief Exec is to give some leadership” (interview 23).

Some participants also mentioned that the balance between executives and non-executives had changed over time. The trustees normally (interview 11), but not always (interview 17), became more dominant as the size of the organization increased:

“Trustees ... meet quarterly and they’re very much hands-off. They’ve become a bit more hands-on ... [*but*] certainly when [*the organization*] was smaller, when we had, six, eight people, ... things would get talked about amongst us and generally there would be a consensus emerge from that” (interview 11).

“[*Trustees*] probably played more of a role in the past than they do now ... [*although*] sometimes we discuss things that they’re very keen for us to do” (interview 17).

Overall, the responsibility of trustees varies across the participant group, from overseeing long-term strategic decision-making to a broader role supporting, and sometimes managing, detailed operational elements. The broad trustee role also included ensuring good governance (the accountability, regulation and transparency of actions, rules and norms governing the organization), issues around maintaining financial viability and sustainability, fulfilling legal, ethical and moral responsibilities, supporting strategic and operational effectiveness and providing scientific and technical advice. In addition, trustees often play a role in surfacing internal tensions and conflicts relating to the organization’s values, culture and processes or managing the different needs, perspectives and worldviews of multiple stakeholders (theme 9, section 4.7.4).

The data on the role of trustees was particularly rich and complex, indicating a wide range of governance structures and processes, involving different decision-making responsibilities and levels of power and control between the executives and non-executives teams. Some participant organizations had more

complex structures reflecting linkages to other charities and institutions (interviews 1, 2, 3, 4, 12, 18), sometimes at regional, national and international level, whilst maintaining autonomy and independence (separate legal identities) at local level (interviews 6, 7, 20 to 26, 31).

4.10.7 Practical dynamics of management

Participant organizations are strongly purpose driven, which significantly impacts the way in which they manage and operate their organizations. However, at the same time, participants often mentioned organizational dynamics, challenges and issues that are common to many other organizations. These factors certainly influence the way in which individual organizations are run but did not override what the participant organizations have in common.

These issues include the impact of strong personalities and internal politics on strategic decision-making, the initial and continuing influence of the founder's legacy (vision, mission and philosophy), succession planning and the transition from a small entrepreneurial organization to a larger one, which involves more formal management processes and procedures (often referred to as becoming more 'professional' by the participants). It also includes more specialist issues, for example, managing hybrid organizations (those that were not exclusively charities) and the resource issues of small and 'micro' organizations in recruiting and retaining professional/management staff, or simply meeting their resource needs in general (section 4.10.5).

Issues of power and control were not commonly discussed directly by participants, unless dominant personalities (founders, chief executives or other key individuals) were in the past or the participants *were* the current founders or chief executives of the organization. Founder-based organizations carried the imprint and cultural legacy of their founder(s) for a long time:

"[*The founder was*] a fiery campaigner, a fiercely single-minded campaigner who looked at decisions that were being made as threats, ... and felt that it was necessary to harness, what we would now call the third sector, the voluntary sector energy to add impetus ... to protect, as best as possible, the special qualities of [*the landscape the charity is focused on*]" (interview 3).

"I'm here because of [*the founder*] and if you'd followed his/her story you would understand why. (S)he was a passionate campaigner for [*the area*], for the landscape, for the people" (interview 9).

"[*The founder*] was the guy who first took a boat between a harpoon ship and a whale ... and set up the current organization because he wanted to set up his own direct-action group to really get stuck in, not to be a protest organization but to be an interventionist organization" (interview 31).

Founders who had built their organizations around their passion for aspects of the natural world were more direct in their responses and, on occasions, were forthright about their position in the organization and their management decision-making style:

"This business is not run by committee. You know, It's really important that. It is run by us ... we're a team and, if the team felt that I was going off the rails, they would probably say so, but it is not a committee so we make decisions very quickly and we get on with things. And, we just get on with it ... Thank God" (interview 18).

“We sit round the table and we discuss things and we don’t vote, it’s not intended to be a democratic forum at all, it is simply an opportunity for everybody to have their say knowing that, ultimately I, guided by them, informed by them, am going to make the policy decisions. And, I’ve done that for 42 years” (interview 12).

Participants indicated that strong leaders, whether founders, executive members or trustees, *do* affect strategic decision-making, often significantly so, including the balance in power between executives and non-executives. Founders are the initiator not only of the organization’s core purpose, vision and mission but also its continued survival in its early days (and sometimes well beyond). They have a very strong imprint on its purpose, culture and values, particularly in small and medium-sized environmental organizations where the sense of a shared connection with nature is strong (themes 1 to 5, sections 4.12 to 4.16). In addition, in the early days of an enterprise founders often exhibit very high levels of drive and commitment to achieve their vision, mission and goals:

“At the time, I had no background or training in ecology or forestry. I had no access to land, I had no resources, I had no contacts with landowners, so, on an external level, I had nothing to help me fulfil that commitment [*that*] I made [*laughs*]. But I had the most important thing, I had passion and inspiration and a strong connection with nature ... that was the start ... it took nearly three years before any work happened [*laughs*] because I had to raise money, I had to educate and inform myself” (interview 11).

Similarly, trustees not only have significant custodial and governance roles and provide expertise and guidance, they are often involved in the appointment of executive management so they can influence the decision-making choice (or lead it) to make sure appointments are aligned to their view of what the charity is all about:

“[*Trustees*] are very aware of decisions that are being made and they’re kept [*informed*]. Anything that’s significant, they’re copied into emails so they can have their [*say*] ... [*which might be*] ‘no, no, no, we don’t want that’ ... they come out with amazing suggestions, but we’ve then got to find a way of realistically delivering it” (interview 17).

Participants from the smaller organizations, for example social and community organizations, had less formalised processes but, nevertheless, often had active non-executive influence. Strategic (or important) decisions were often discussed, formally or informally, in small (leadership) groups, which might include key staff and/or key influencers who do not, necessarily, have a formal executive role (family, partners, close friends, volunteers, members, supporters, mentors, advisers or those who share the life journey of the founder or key executive decision-maker):

“If we are taking decisions that are just about the [*leadership*] group then we have meetings, we have a once a month meeting, so things get discussed at that. So, if it’s something that’s going to have some major implications, there are probably a few people, core members, myself, and the Secretary, perhaps the Treasurer who might [*get together to discuss it*] and the trainers ... or any other members, depending on [*what*] the particular issue is” (interview 27).

Issues of power and control within the strategic management processes of participating organizations can impact on organizational culture and may not be overt within the organization. This has been discussed as the shadow side of organizational culture (Egan, 2012) in relation to the resolution of tensions and conflicts within the participating organizations (theme 9, section 4.7.8).

4.10.8 Key linkages

Participant organizations navigate strategically through fundamentals and/or guiding principles, which are closely linked to the organization's core purpose and deeply held value systems, which are founded on recognizing the intrinsic as well as the extrinsic value of nature (strategic thinking, theme 6, section 4.6; research question 1, section 4.5). This enables them to engage with extended communities of interest (theme 7, section 4.9) including members, volunteers and other communities, which underpin their financial viability and sustainability over the long term (the relational nature of the strategic process, research question 3, section 4.11).

This is, however, is not enough, by itself, to meet core purpose and ensure financial sustainability and participant organizations rely on effective strategic and financial planning processes (formal or informal) to secure ongoing funding, prioritise objectives, increase effectiveness and efficiency and communicate with the outside world in a language that it understands (cognitive, analytical and predominantly extrinsic). This plays a critical role in enabling the participant organizations to significantly leverage their resources (research question 2, section 4.8).

The strategic planning processes in participating organizations are complex. They are loosely integrated with other processes, including strategic thinking (theme 6, section 4.6), governance and the consultative processes that connect participating organizations to their extended communities of interest (theme 7, section 4.9). In addition, participant organizations are subject to issues of power and control and other organizational dynamics that are found in almost all organizations.

Despite the diversity of structures, cultures and different approaches adopted there are strong common themes to strategic decision making within the participant group. Their strategic processes work *together* to allow them to achieve their purpose and long-term sustainability by working with multiple stakeholders, who have very different perspectives and worldviews. When tensions, conflicts and issues arise from meeting the needs of these stakeholders, they are resolved, or simply held, within pivotal spaces where these processes coincide (theme 9, section 4.7).

4.11 Purpose driven organizations (RQ3)

How does a more relational approach to strategic thinking, based on a sense of connection, challenge our existing understanding of strategic thinking?

This section summarizes the participants' analytical story in relation to research question 3 (sections 4.11.1 to 4.11.2) and discusses it in relation to the wider body of literature (section 4.11.3 to 4.11.8). For clarity indicative literature references are given within the analytical story but the full discussion is in the sections that follow. This maintains the flow of the analytical story and the strong focus on participant data.

4.11.1 Structure: Key themes and relationships

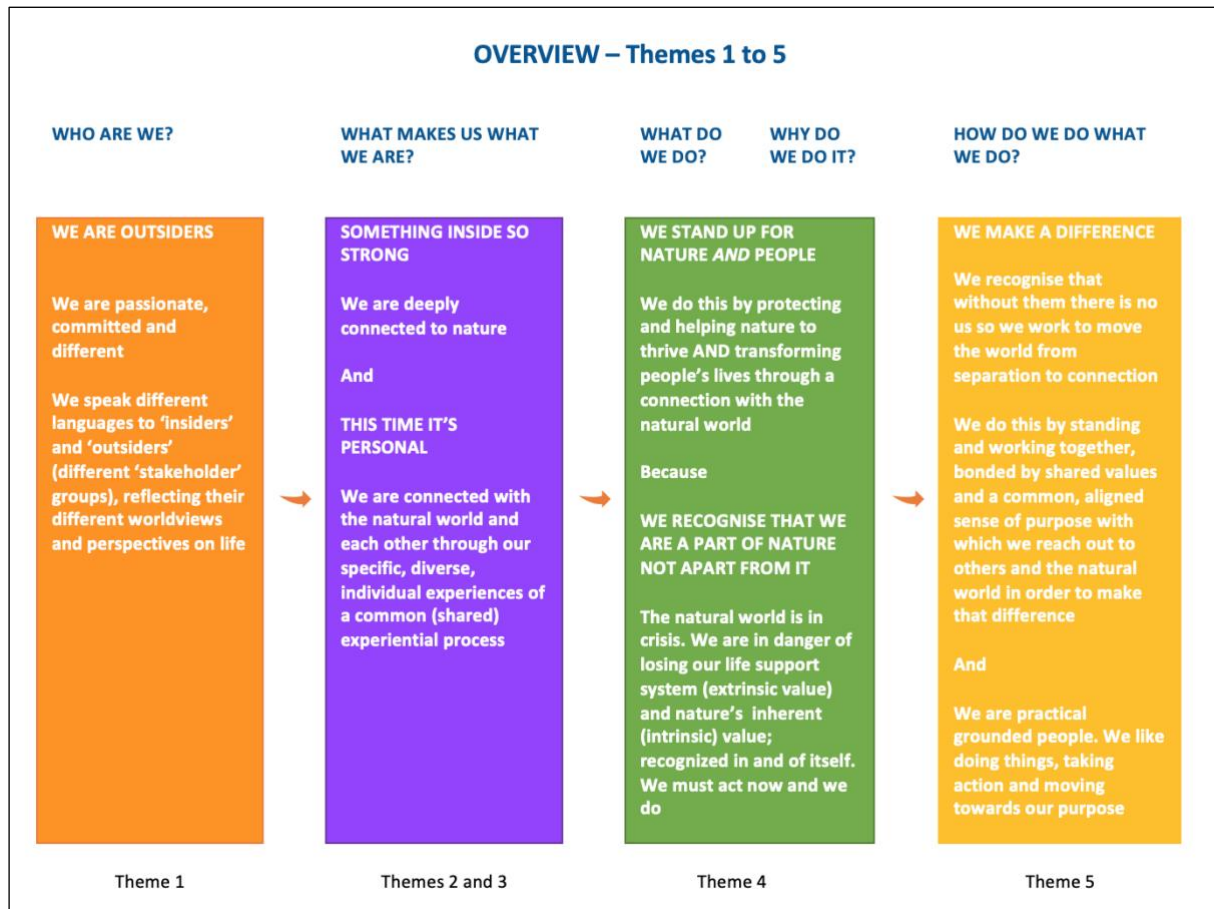
The third research question focuses on a relational approach to strategic thinking, which is addressed in themes 1 to 5. These look at foundational questions relating to who the participants are, and what, why and how they chose to do what they do. Theme 1 relates to the question, 'who are we?', themes 2 and 3 address the question, 'what makes us what we are?', theme 4 covers two questions, 'what we do?' and 'why do we do it?' and theme 5 addresses the question, 'how do we do what we do?'. These themes are key components of the participants' story relating to research question 3 (sections 4.11.3 to 4.11.8) and are explored further, as individual narratives, in the following sections:

- Theme 1: We are outsiders (section 4.12).
- Theme 2: Something inside so strong (section 4.13).
- Theme 3: This time it's personal (section 4.14).
- Theme 4: We stand up for nature *and* people because we recognise that we are a part of nature not apart from it (section 4.15).
- Theme 5: We make a difference (section 4.16).

This structure provides two pathways for following the analysis of participant data, each of which adds value. The summaries by research question provide a pathway to conceptual insights and theory development within the context of the extant body of the literature. The thematic analysis allows us to go deeper into the participant story and thematic narratives, providing a wealth of detail for practitioners in the field, contributing to the praxis literature. The themes relating to research question 3 are illustrated in figure 10 below.

The participant data is complex and interconnected and themes often relate to more than one research question. Research question 3 is linked to strategic thinking as organizational purpose drives the strategic process (research question 1, section 4.5; theme 6, section 4.6) and directly impacts on the way in which participant organizations leverage their limited resources (research question 2, section 4.8). These are noted in the analysis and discussion but, for ease of presentation, theme 6 (relating to strategic thinking) is discussed in research question 1 (section 4.5).

Figure 10: Relational Approach to Strategic Thinking



Source: Researcher data analysis

4.11.2 The participants' story

Participant organizations are purpose driven and relational, bound by shared values, beliefs and experience (Drucker, 1989; Collins and Porras, 1996, 2005; BoardSource, 2005; Beng Geok, 2018, which are based on a strong connection with the natural world. This is the glue that holds them together and allows them to act collectively and make a difference (theme 5, section 4.16). Purpose, or mission, drives strategy rather than the other way around (Drucker 1989). Profit is not a central motivation but financial viability and sustainability are essential to meeting organizational core purpose.

The connection to nature is of the utmost importance to participants. Throughout the research process, in all the data collection methods, they returned to this topic whenever they could. As a group they live and breathe their connection with the natural world and it is what binds them together. It is for this reason that the participants' story is best read from the bottom up. It is this connection, which ultimately drives the strategic processes. Much of the insight from the research study, from a praxis perspective, is found here. Participants expressed their thoughts and feelings passionately and sometimes emotionally. There were times when they were close to tears, sad and grieving, exasperated, frustrated and disillusioned and yet, as a group, they remained stubbornly hopeful:

"I think we have a moral responsibility ... I don't view humans as more important than the rest of

the ecosystem ... they're all interconnected and... ultimately it will all come back on us as well and affect us negatively ... but even if that wasn't the case, I think we have this responsibility to care for the rest of the living organisms ... to appreciate that they *[are]* as important as ourselves and we need to live in balance with them. By being in balance I mean that the population of animals and plants there should be able to live alongside us and not be diminished in any way" (interview 8).

"We do it because we believe in it... and that makes it a rather bizarre business model because if an accountant looked at the time I invested ... he would laugh. So the connection ... is really what drives us and what allows us to do it because not everything that we do has a price associated with it. Some of it does but not all of it" (interview 10).

"Because this is my way of life" (interview 25).

A connection to nature is fundamental to participants but it is also complex. It encompasses not only a full range of human sensibilities, intelligences or capabilities (mind, body, heart and spirit) and strong perspectives (ecological and scientific worldviews) but also a shared experiential process of connection that is *both* specific and universal (Rohr, 2016, 2018; Cameron, 2017;) that binds the participants strongly together. The powerful connection with the natural world is deeply felt, part of the participants' identity and provides meaning and purpose (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007). It is this intensity of connection that underpins the relational and purpose driven nature of participant organizations and drives the strategic process:

"It is about regarding nature as not being subservient to people ... because we are part of it and not the reverse" (interview 15).

"It's a hard thing to explain really but ... they're a living creature, they have as much right to be on this earth as we do ... personally, and obviously a lot of people working in conservation, we feel that *[all living things]* have intrinsic importance. They are important in their own right" (interview 32, researcher italics).

As a result, participant organizations are relational and purpose driven (Drucker, 1989) and this binds them together internally through shared values, beliefs and experience (Weeks 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012; Mitroff, 2016; Cardona, Rey and Craig, 2019) and underpins their ability to engage with the outside world and create extended communities of interest (theme 7, section 4.9). This significantly impacts on the nature of strategic thinking within them (research question 1, section 4.5) and how they leverage their limited resources (research question 2, section 4.8):

"I was looking for something where it wasn't the bottom line that was driving everything. ... different objectives that were driving the business activity. The bottom-line drives decisions that aren't necessarily what I would call doing the right thing" (interview 28).

For participants this sense of aligned purpose and shared values is very rarely a theoretical construct, but instead one that is intensely practical and grounded. It brings together staff, volunteers, members and other stakeholders to achieve specific social goals within the overall remit of the organization and forms the basis of working collaboratively with others. This practicality can appear prosaic but it is also very powerful:

"We'll take on any campaign. ... especially the unloved species ... we're not selective about the species we defend. ... Our clients are not people. They're not governments. They're not nations.

Our clients are the species we're saving ... the whales, dolphins, seals, turtles, sharks, sea cucumbers, you name it, anything that we actually try and save ... [*We do what we do*] because no-one else is ... it really is that simple ... we're doing something that on-one else is doing" (interview 31, researcher italics).

"To me it means sometimes getting your hands dirty and crawling around a loft in a big pile of bat poo!" (interview 27).

This process of connection is diverse and specific (personal to each participant) but it is also universal, shared and understood at a deeper level by the participant group (theme 3, section 4.14). It is thus deeply meaningful to the participants (expressed in terms such as 'we get it', 'the thing', 'the spark' and 'the trigger') and bonds them together, creating a strong sense of mutuality inside their workplace and communities. However, it also creates a strong feeling of being separate, odd and different from others in the 'outside world', that the way that they feel about the natural world, and the intensity of their feelings, is not widely shared by others (Vining, Merrick and Price, 2008). They are outsiders (theme 1, section 4.12). To the participants, their personal, yet mutual, connection stands in sharp contrast with the belief in separation from the natural world that is pervasive elsewhere in the world (theme 4, section 4.15):

"I felt very disconnected from people ... clearly I felt a bit different but I couldn't really work out what it meant ... yeah... I was a bit odd" (interview 1).

"We keep being told, we're selling our souls" (PW5) ... "I have to continue to be me and to be true [*and continue*] ... caring about nature and people" (PW1) (group interview 37, multiple participants).

"You get focused on looking after one poor little Pipistrelle bat that's got a broken wing ... what I actually like doing is going out and doing the fieldwork and looking after the individual bat (interview 27).

Participants do what they do because of this strong connection with nature. They also believe the world is in crisis (theme 4, section 4.15), a deeper and more existential crisis than is widely perceived by the outside world, one which affects both the natural world *and* people. Each of the participants, in their own individual and unique way, is fully committed to support the natural world by working to conserve, protect and restore it directly and/or by supporting people through contact with the natural world; therapeutically, economically, socially and through enhanced wellbeing (themes 4 and 5, sections 4.15 to 4.16):

"For some people it is literally all they've got and it's crucial ... I don't think it would be an exaggeration to say that ... it could almost be life and death ... that is how bad some of the people are feeling that I see on a daily basis. So, for those people, at that stage in their life, it's vitally important ... they might not be under the mental health service that's all they've got. And, if that isn't important, then nothing is" (interview 25).

"Everybody deserves access to the natural world ... to be able to take part in that ... there's a lack of equality of opportunity ... we have a moral imperative to a certain extent" (interview 23).

This builds on the participants' strongly held belief that nature offers humankind not only extrinsic value (our life support system) but also intrinsic value (nature is of value in and of itself) and that we are a part of nature, not apart from it. It also taps into a broader sense of connectedness, widely held by many participants, which is expressed in values such as empathy, compassion, fairness, justice and support for others, especially the disenfranchised, the underdog (theme 1, section 4.12):

"I wouldn't be sitting doing this job if it wasn't for [*that dimension*]" (interview 14).

Many participants talked about this in terms of moving the world, bit by bit, from separation to a state of connectedness:

"I feel that the ... forest and all of the wildlife that lives in there, has a right to exist, absolutely" (interview 35).

"Everything in nature is equally evolved ... we've taken different paths and we all have a role to play, a part to fulfil ... it's wrong for humans to be curtailing that through driving species to extinction, through devastating habitats and exploiting things ... unsustainably for our own short-term greed" (interview 11).

These strong foundational beliefs and experiences, focused on connection to the natural world, bring participants together to make a difference in the world through shared values and collective purpose and endeavour (theme 5, section 4.16) and by reaching out and engaging others, including through partnerships, projects and other forms of collaboration (theme 7, section 4.9). These shared values and common sense of purpose are the glue that holds the participant organizations together. This strong purpose driven, relational foundation feeds into and drives the strategic processes within participant organizations (research question 1, section 4.5) and enables them to leverage their limited resources successfully (research question 2, section 4.8).

4.11.3 Theoretical context

The relationship of the natural world with organizational strategy permeates the literature in many contexts. The key aspects in relation to the participants' analytical story are the specialist literature on the process of connection to the natural world (sections 4.11.4 to 4.11.5 and 4.11.8) and the literature underpinning the purpose driven nature of participant organizations (sections 4.11.6 and 4.11.7). The broader literature base can be usefully compared and contrasted with the rich and deep participant data, particularly from the perspective of praxis. It has also been integrated into the analysis and discussion of both research questions 1 and 2 (sections 4.5 and 4.8) as well as the individual themes underpinning this research question (themes 1 to 5, sections 4.12 to 4.16).

The literature on sustainability and the environment emphasises the complexity of the natural world (Neugebauer, Figge and Hahn, 2015), the severity of the environmental crisis, with a strong focus on finding sustainable solutions (Aragón-Correa, 1998; Stead and Stead, 2000; Hawken, Lovins and Lovins, 2005, 2007), the need to adapt current competencies and capabilities to changes in the environment (Pérez-Valls, Céspedes-Lorente and Moreno-Garcia 2016), the potential contribution of frameworks drawing on scientific principles, including biology, ecology and complexity, to organizational and strategic decision-making (Eisenhardt and Sull, 2001; Kurtz and Snowden, 2003; Iansiti and Levien, 2004; Zahra and Nambisan, 2012) and the broader, potentially very serious, impact of the environmental crisis on organizations and society as a whole (Starik et al., 1996; Bradbury and Clair, 1999; Stead and Stead, 2000; Dyllick and Hockerts, 2001; Husted, 2013).

Each of these areas can fruitfully be applied to specific aspects of the participant data, for example, the emergent nature of the strategic processes of participant organizations (Neugebauer, Figge and, 2015), discussed in relation to research question 1 (section 4.5.6). The emphasis in this section is on the literature that is most important to understanding the participants' story in the context of a relational view of strategy. Strategy, at its most basic level, involves matching internal capabilities with the needs of the external environment. In essence, it is all about relationship.

4.11.4 Strong connection with nature

Research participants emphasized holistic and interconnected approaches to their work, which emanated from their strong sense of connection to the natural world (Kals, Schumacher and Montada, 1999; Shultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009; Vining, Merrick and Price, 2008) and was expressed through a spectrum of human sensibilities or intelligences (mind, body, heart and spirit; chapter 2, section 2.10), together with the personal, ecological and scientific world perspectives of the participants (themes 2 and 4, sections 4.13 and 4.15). This is summarised in the nature-based literature review (chapter 2, sections 2.11 to 2.13) and there is a strong alignment with the participants' story and underlying data. Despite this range of sensibilities and perspectives, the emphasis by participants on the criticality of the ability to see and act *from the perspective of the whole* is one of the defining features of the research data.

Participants share a strong sense of connection with the natural world (themes 2 and 3, sections 4.13 to 4.14), expressed through a spectrum of human sensibilities, characteristics or intelligences. These multiple intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011) or thinking styles (Groves, Vance and Choi, 2011) encompass a broad range of capabilities that have been applied within the business literature to expand beyond head or mind-based intelligence (cognitive, mental, rational and analytical; Porter, 1996). These include body (intuition, gut feelings, the senses; Minocha and Stonehouse, 2007; Shapiro, 2011, 2019), heart (emotional, affective, relational; Goleman, 1996, 2004), spirit (a deeper sense of knowing; Zohar and Marshall, 2001), as well as a mixture of cognitive and more intuitive processes (Sanders, 1998; Calabrese and Costa, 2015).

This is also reflected in the specialist literature that looks at the key elements in the connection process to nature; cognitive (mind-based), affective (heart-based) and behavioural (body-based) (Schultz, 2002; Nisbet, Zelenski and Murphy, 2009). Participants also talked extensively about their worldviews and perspectives (ecological, scientific and community-based) and practical engagement (Clayton, 2003), which both formed and strengthened their relationship with the natural world.

The idea of multiple sensibilities and ways of perceiving the world is also reflected within the broader strategic and organizational literature, for example, an emphasis on the senses and intuition (Mintzberg, 1994; McCarthy and Leavy, 2000; Graetz, 2002), the influence of the body on the mind (Shapiro, 2011, 2019), emotional intelligence (Graetz, 2002) and capabilities drawing from a deeper place, for example creativity (Mintzberg, 1987b, 1994; Heracleous, 1998; Liedtka, 1998; Bonn 2001, 2005; Moon, 2012).

Mindfulness-based business strategies (Ndubisi, Nygaard and Capel, 2019) place a similar level of importance on individual and organizational perspectives; the way in which we think and perceive the world.

This links to the idea that strategic thinking is a way of thinking, a mindset that incorporates a broader range of capabilities and perspectives including cognitive, relational, holistic and embodied components (research question 1, section 4.5.5; chapter 2, section 2.3). Mintzberg (1987a, p.16) describes strategy (as perspective) as “an ingrained way of seeing the world” and Graetz (2002) associates left brain thinking with the planning process and right brain thinking with the rational thinking component of strategy making (Graetz, 2002, p.460). Strategy requires both emotional intelligence and intellectual intelligence, an approach that is “whole brained” (Graetz, 2002, p.460). Sanders (1998) sees “visual thinking” (the link between intuition and intellectual understanding) as the “key to strategic thinking” (Sanders, 1998, p.15).

In practice, the participants’ story suggests a complex, nuanced relationship with the natural world. Participants did not use the term ‘intelligences’, preferring to talk in terms of senses, sensibilities or characteristics, which were often more embodied ways of thinking and knowing (relating to heart, body and spirit). These were personal ways of perceiving the world; most often, emotional, intuitive, physical (body-based) and a sense of knowing (spiritual or philosophical) (theme 2, section 4.13), which they used in addition to mind-based thinking. Participants sometimes recognised that they were dominant in one particular area but often talked in terms of the desirability of a balance of sensibilities including the cognitive dimension. A common opinion was that the cognitive, analytical mindset was necessary but over dominant and it needs to be balanced with other perspectives or ways of thinking.

The importance of balancing cognitive and other less linear forms of thinking (Sanders, 1998; Calabrese and Costa, 2015) is found in literature in other areas, for example, entrepreneurial studies, which suggest that entrepreneurs are able to “think *beyond* existing knowledge structures and heuristics” (Haynie et al., 2010, pp.218, italics in original), using nonlinear thinking styles that include insight, emotions, creativity and intuition (Groves, Vance and Choi, 2011) but that a balance of approaches is important:

“In stark contrast to the popular notion that entrepreneurs generally prefer intuitive, emotion-driven, and imaginative thinking and decision-making styles at the expense of analytic, data-driven, and logical thinking ... [they] are more likely to possess a balanced linear and nonlinear thinking style profile” (Groves, Vance and Choi, 2011, p.456 and p.458).

At the same time, the participants’ connection with nature is intense and felt very deeply, a fact that they believe sets them apart from others, makes them outsiders (theme 1, section 4.12). The primary literature that explores a connection with the natural world (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009) suggests that cognitive, affective and behavioural components are all important but also contains a strong affective dimension. Mayer and Frantz (2004), for example, define connection as “an individual’s affective, *experiential* connection to nature” (Mayer and Frantz, 2004, p.504, researcher italics).

For the research participants, there was an important *shared experiential component* within the *process*

of connection itself, which was *specific* to them, yet provided a *universal* sense of meaning (Rohr, 2016, 2018; Cameron, 2017) (theme 3, section 4.14). This shared experiential process of connection binds the participants strongly together in a sense of common endeavour, which then becomes the foundation of the purpose and value-driven participant organizations. It is the glue that binds them together. In the specificity of the diverse connection process they find a universal sense of meaning (Rohr, 2016, 2018; Cameron, 2017).

The feeling of being outsiders (theme 1, section 4.12) plays a key role in the depth and intensity of participants' connection with nature, impacting their sense of identity and self and providing the foundations for collective action through purpose driven organizations (Rey and Malbašić, 2019, section 4.8.4). The language of connection used by participants was expansive. Vining, Merrick and Price (2008) found that perceptions of relatedness to nature were expressed in terms of connectedness (inter-dependence, inherent connection, shared essence, shared habitat, closeness), action (resource, recreation, residence, stewardship/harmony, interaction with animals, environmentally responsible behaviour) and affect (caring/responsibility, enjoyment, love, morality, spirituality/philosophy, peace/tranquillity, wellbeing). Participants used all these words and concepts and many more (awe, wonder, beauty) some prosaic but equally powerful.

Vining, Merrick and Price (2008) also found that many people still felt separate from nature, that it is something 'out there'. The research participants did *not* feel this way and they consider that important; it is an essential part of what makes them feel different. They resonated with nature in many diverse ways but they all felt a sense of wholeness, being a part of nature not apart from it (theme 4, section 15) and they recognise the interconnectivity that permeates the natural world, that without 'them' there is no 'us'.

Participants talked of the value of nature as being both explicit (humanity's life support system) and intrinsic (implicit, inherent or innate; valued in, by and of itself). The idea of implicit connection, which arises from *within* us, runs strongly through the specialist literature. Schultz et al. (2004, p.31) argue that it exists outside of conscious awareness. It is also expressed in the concept of oneness that has been explicitly included in instruments measuring connectivity (Clayton, 2003; Kals, Schumacher and Montada, 1999; Nisbet, Zelenski and Murphy, 2009). Dutcher et al. (2007) argue that connectivity:

"Describes a perception of sameness between the self, others, and the natural world. The experience of connectivity involves the dissolution of boundaries and a sense of a shared or common essence between the self, nature, and others" (Dutcher et al., 2007, p.474).

The importance of intrinsic as well as extrinsic value also crops up within the organizational and strategic literature (Senge, 1990; Collins and Porras, 1996; Bonn, 2001, 2005) and the literature focusing on the natural world (Mitchell, 2002; McCarthy, 2009; Oliver 2009; Nicolson, 2013; Murray-Fennell, quoting Mavor, 2015).

The research on the importance of the natural world as a focal point for purpose-based organizations is sparse. The mainstream strategic literature with an environmental focus (Aragón-Correa, 1998; Stead and Stead, 2000; Hawken, Lovins and Lovins, 2005, 2007) tends to be focused on commercial, generally

large organizations. The literature on small and medium-sized organizations and the environment also tends to focus on commercial organizations, very often on sustainability issues (Williams and Schaefer, 2013; Bakos, Siu, Orengo and Kasiri, 2020). This literature is valuable but it does not necessarily express the intensity of feeling within the participant organizations as purpose driven rather than profit oriented *and* nature-focused. This requires looking at the broader literature, including the not-for-profit sector (Hatten, 1982; Drucker, 1989; BoardSource, 2005) and entrepreneurial and small and medium-sized organizations (Runhaar, Tigchelaar and Vermeulen, 2008; Haynie et al., 2010; Groves, Vance and Choi, 2011; Williams and Schaefer, 2013).

This literature is not directly comparable to the participating organizations but it often provides insights into how participant data *may* be interpreted. Williams and Schaefer (2013), for example, conducted a qualitative study of the environmental engagement of small businesses in the east of England and found, that “personal values and a sense of being able to contribute to environmental protection” were important to the small business participants in the research study (Williams and Schaefer, 2013, p.173), which contrasted with public bodies giving advice to small businesses based solely on the commercial advantages of beneficial environmental policies. This suggests that commercial business managers are, sometimes, more receptive to the wider value of nature than self-interest alone suggests.

4.11.5 Nature writing literature

Nature writing literature also provides invaluable insight into the world of the participants. This is closely aligned with the way in which participants see themselves in relation to the natural world. This connection is profoundly important to them and it changes them. It can be transformational as Mike Clarke, former CEO of the RSPB, noted at the RSPB Members AGM in 2017, when he talked about his own, personal journey into nature:

“I didn’t realise it at the time but I’d fallen in love, in love with the natural world” (Clarke, 2017).

There was a close alignment, perhaps unsurprisingly, between participant data and the review of nature writing literature. The language used by participants often reflected that used in the environmental sector as a whole and within the broader communities that are formed around those who have an affinity for the natural world. Those writing about nature reflect these key aspects of connection. Although the research participants connected with nature in a variety of ways the dominant form of that connection was relational, which is strongly represented within this literature stream (Shultz, 2002; theme 2, section 4.13). In addition, nature writers, like the research participants, placed a strong emphasis on the importance of intrinsic as well as extrinsic value (McCarthy, 2009; Nicolson, 2013; Macfarlane, 2019a; Whyte, 2019) and made links between a connection to nature and personal or cultural identity (Schama, 1995; Mitchell, 2002; Oliver 2009; Macdonald, 2014; Murray-Fennell, quoting Mavor, 2015).

Many participants talked of a sense of awe and wonder for the natural world (themes 2 and 4, sections 4.13 and 4.15), which is contained within the RSPB’s simple relational definition of nature (chapter 2, section 2.12.1). This reflects the level of importance of the experiential process of connection (section 4.11.4) that many participants felt was so significant in their lives (theme 3, section 4.14), one that is

affective and experiential (Mayer and Frantz, 2004, p.504). Participant organizations fulfil their purpose by reaching out and engaging others who feel the same way (themes 5 and 7, sections 4.16 and 4.9). “At its core it is a very simple idea: the more people *experience*, connect with, and share their *love of nature*, the more support there will be for its conservation” (Brooks, 2016, researcher’s italics).

The participants strongly echoed the sense of personal loss caused by the disconnection of mainstream society from nature and the significant erosion of the web of life expressed by so many nature writers (McCarthy, 2009; Anthony, 2010; Macfarlane, 2013, 2015, 2019a, 2019b; Lewis-Stempel, 2014; Macdonald, 2014; Lister-Kaye, 2015; theme 4, section 4.15). For both nature writers and participants the language is often relational, emotive and heart-felt. At times, there was a palpable sadness, loss and, occasionally, a sense of grief amongst participants (theme 1, section 4.12.3). Participants also used precise language, which expressed their connection with the natural world and was rich in meaning, for example, the Welsh words *cynefin* and *hiraeth*. This is explored in more detail in the nature-based literature review (chapter 2, section 2.13.1).

The participants are strongly focused on their work in the environmental sector and it is not surprising that their language, beliefs and perspectives reflect those who write about the natural world. However, the nature writing literature, and the related academic literature on the nature of our connection with nature gives a strong indication of the perspectives, beliefs and worldviews of the participants, emphasising both the intrinsic and extrinsic value of nature and the danger of losing this connection:

“We are all a part of nature. We are born in nature; our bodies are formed of nature; we live by the rules of nature. As individuals, we are citizens of the natural world; as societies, we are bound by the resources of our environment; as a species, our survival depends on an ecological balance with nature. Yet as individuals, societies, and a species, we spend our lives trying to escape from nature” (Schultz, 2002, p.61).

4.11.6 Purpose and value-driven organizations

Participant organizations are purpose driven and relational. They are also characterised by other influences including strong personalities (founders, executives and trustees), issues of power and control, cultural dynamics (for example, founder legacies) and many other factors that are experienced in organizations of very different structures, sizes and orientations. Thus, whilst a connection with nature is a critical element of the purpose driven nature of participant organizations as a whole, its impact also depends on the size and culture of the organizations. This is discussed in detail in the main themes on the strategic management of participating organizations (themes 6 to 9, sections 4.6, 4.7, 4.9 and 4.10).

In smaller organizations and those led by strong personalities (founders, individual executives or trustees) the direct influence of individuals (and their underlying personalities, perspectives, worldviews and personal experience of connection to nature) more directly impact the strategic decision-making process. However, for the majority of participant organizations, the impact of a connection with the natural world is felt more strongly *indirectly* through the purpose driven nature of the organizations, which allows participants to act collectively to make a difference in the world (theme 5, section 4.16).

There is a growing recognition of the importance of organizational purpose and values in creating a long-term sustainable position for a wide spectrum of organizations; commercial (Ghoshal and Bartlett, 1993, 1997; Collins and Porras, 1996, 2005; Stead and Stead, 2000; Kenny, 2014; Hollensbe et al., 2014; Mitroff, 2016; Hurth, 2017; Thakor and Quinn, 2018; BAM, 2018, 2019; Rey, Bastons and Sotok, 2019), small and medium-sized enterprises (Runhaar, Tigchelaar and Vermeulen, 2008) and not-for-profit concerns (BoardSource, 2005; Beng Geok, 2018). Vision, mission and purpose are seen as playing a unifying role within an organization. Stead and Stead, for example, develop a framework for understanding “what the organization stands for” to guide strategy formulation based on the core values and the ethical roots of the organization (Stead and Stead, 2000, p.313).

The broad strategic and organizational literature acknowledges a strong relational element within organizational decision-making, particularly for not-for-profit organizations (Drucker, 1989; Beng Geok, 2018). This includes the importance of strong sense of mission (Drucker, 1989), vision (Senge, 1990; Bonn 2001, 2005; Moon, 2012), organizational values and culture (Allio, 2006; Weeks 2006; Goldman and Casey, 2010; Schein, 2010; Moon, 2012; Mitroff, 2016), intentionality (Hamel and Prahalad, 1994, 1996, 2005; Liedtka, 1998; Graetz, 2002), commitment (Mintzberg, 1987b; Drucker, 1989; Mintzberg et al., 1998; Collins, 2001) and interconnected perspectives such as holistic and systems thinking (section 4.11.7; research question 1, section 4.5.5). Much of this literature has a process orientation (Mintzberg, 1987a 1987b, 1994; Mintzberg et al., 1998) and there is a link to the practical aspects of the strategic process highlighted in the praxis literature (Whittington, 1996; Goldman, Scott and Follman, 2015).

The relational element within strategic decision-making plays a key role in organizational success. Senge (1990) classifies a shared vision as one of key disciplines of a learning organization, bringing attention to the importance of *shared* vision as unifying force when he describes it as “*a calling rather than simply a good idea*” (Senge, 1990, p.142, italics in the original). Hamel and Prahalad (1994) prefer the term, ‘foresight’ to vision but stress the importance of “creating the future” through a distinctive view of that future, and link this directly to “organizational transformation” (Hamel and Prahalad, 1994, p.127). Collins and Porras (1996) discuss the relationship of vision to core ideology (core values and purpose) and link this directly to organizational success:

“Companies that enjoy enduring success have core values and a purpose that remain fixed while their business strategies and practices endlessly adapt to a changing world” (Collins and Porras, 1996, p.65).

The relational aspects of strategy are key to differentiating an organization. Collins and Porras (1996) state that core ideology defines “what we stand for and why we exist”, the organization’s “reason for being” that “is unchanging”, whilst core values are “essential and enduring tenets of an organization, a small set of timeless guiding principles [*that*] require no external justification; they have *intrinsic* value and importance to those inside the organization” (Collins and Porras, 1996, p.66, italics in original). This recognition of intrinsic value and its link to core purpose and values is reflected throughout the participant data. Moreover, core ideology “provides the glue that holds an organization together through time”, you discover it “by looking inside. It has to be authentic. You can’t fake it” (Collins and Porras, 1996, p.66, italics in original).

The language above (“*shared* vision”; “*core* purpose”; “what the organization stands for”; “a calling”; “intrinsic value”; “glue that holds an organization together”; “unchanging”; “what we stand for”; “reason for being”) is strongly redolent of the language used by the research participants. The emphasis on intrinsic value and “discovering” core ideology (Collins and Porras, 1996, p.71) by looking *inside* also strongly reflects research participants’ comments. However, there is a difference in emphasis here between the participant organizations and commercial organizations; whilst the latter may have to engage on a voyage of discovery, participant organizations are overtly purpose driven from the beginning:

“You do not create or set core ideology. You *discover* core ideology. You do not deduce it by looking at the external environment. You understand it by looking inside. Ideology has to be authentic. You cannot fake it. Discovering core ideology is not an intellectual exercise. Do not ask, What core values should we hold? Ask instead, What core values do we truly and passionately hold? You should not confuse values that you think the organization ought to have – but does not – with authentic core values” (Collins and Porras, 1996, p.71, italics in original).

Participant organizations already know their core purpose, through their connection with nature and they *take that passion into the organization*. Participant organizations are *overtly* purpose driven; it is in their blood, their DNA, and it *becomes* the glue that holds them together:

“Shared purpose cannot simply be invented at the top—only to be imposed downward. The reality is, *purpose already exists and is alive*. This is the paradigm shift and it challenges our traditional understanding of leadership ... influence is not in the hands of one or a few, but in the hands of all who share the purpose and thus are eager to make it come to life in their work. These actions cannot be taken solely by the group leader, but must be taken by the group as a whole ... that only arises from a fully internalized understanding of the shared purpose” (Cardona, Rey and Craig, 2019, p.58, researcher italics).

The research participants were very different from each other, with diverse perspectives, ways of seeing and perceiving the world (theme 2, section 4.13) and, no doubt, different belief systems (they were not formally asked). They were connected to many different aspects of the natural world; flora, fauna, landscapes, animal welfare, advocacy for nature and justice and equity for people. Many participants had strong views on social justice, equity, fairness, compassion and empathy, which were focused as much on people as nature, sometimes more so (theme 4, section 4.15). However, they also *shared an experience* of what it means to be connected to the natural world, the process of that connection itself. This was specific and individual (and, therefore, sometimes intensely personal) but also universal (Rohr, 2016, 2018; Cameron, 2017).

For this reason, it was not always easy for participants to identify the link between personal values and organizational purpose and values. They sometimes struggled with putting together value statements or remembering the values that are part of their formal statements, although they implicitly recognised the congruence in values between themselves and others (for example, interviews 7, 33, 35). This may be because they tended to focus on their deep connection to nature (and the values associated with this connection) and underestimated the unifying nature of the deeper ‘foundational’ values (empathy, compassion, fairness, justice, equity and support for others) that applied to *both* nature and people (theme 1, section 4.12). In practice, however, they recognised this quality in each other, whether they were able to put words on it or not; they recognised that ‘we get it’, without having to specify exactly what

the 'it' is:

"To do a good job here ... we'd like you to share our values ... but you don't really have to ... [*one member of staff*] is not a great fan of nature, (s)he doesn't really go outside very much but (s)he loves the values of [*the organization*]. So, (s)he's here for the human side of [*it*]" (interview 35, researcher gender neutrality, full quote, section 4.9.2).

"There's a big element of fairness here ... All of these animals and plants and things ... were here before we were, we're interfering with them, they don't damage us ... they don't wish us any harm ... yet, we do them quite a lot of harm" (interview 36).

Many strands of the broad body of literature resonate strongly with the participant data, particularly in the area of purpose, mission, vision and values. However, the literature is focused primarily on commercial profit-driven organizations, whilst purpose and underlying values define the participant organizations. Their foundation is relational. This is a fundamental and important difference. This is why the participants' analytical story is best read from the bottom up, from the participants' strong and shared sense of connection with the natural world. This is where the 'fire in the belly' that propels them emanates from.

The relational nature of participant organizations is reflected principally in the fact that they are strongly purpose and values driven. They embody a wide societal remit that *defines* their strategic processes. Purpose drives strategy and not the other way round. Drucker (1989) recognises the powerful impact of the not-for-profit model; "nonprofits are generating a powerful countercurrent ... forging new bonds of community, a new commitment to active citizenship, to social responsibility, to values" (Drucker, 1989, p.93). They are driven by mission not money, yet are aware of the value of effective strategic planning (research question 2, section 4.8). Mission (or purpose) is viewed as central but effectiveness is also key for sustainability and survival:

"Nonprofits ... realize that good intentions are no substitute for organization and leadership, for accountability, performance and results. Those require management and that, in turn, begins with the organization's mission ... Nonprofits do not base their strategy on money, nor do they make it the center of their plans ... [*they*] start with the performance of their mission ... the best ... devote a great deal of thought to defining their organization's mission ... [*which*] serves as a constant reminder of the need to look outside the organization ... and define clearly what changes *outside* the organization constitute "results" and to focus on them" (Drucker 1989, p.89, italics in the original).

This provides a very clear exposition of the views of the research participants, encompassing the *outside* perspective, as well as the inward focus of the participating organizations on their purpose. Drucker also captured the sense of stewardship that research participants often expressed, establishing trust by putting the needs of the organization before their own (Drucker, 2004):

"Don't think or say 'I'. Think and say 'we'. Effective executives ... have authority only because they have the trust of the organization. This means that they think of the needs and the opportunities of the organization before they think of their own needs and opportunities. This ... may sound simple; it isn't, but it needs to be strictly observed" (Drucker, 2004, p.21).

4.11.7 Holistic dimension

A relational view of strategy may also incorporate an understanding of the world based on a more connected perspective, seeing the world as an interconnected whole, and thus relational (chapter 2,

sections 2.8 and 2.9), rather than adopting a competitive paradigm that sees organizations as separate (chapter 2, section 2.7). A significant strand within the strategic and organizational literature (and particularly the strategic thinking literature) emphasises this form of connectivity. Strategic thinking is defined as “conceptual, systems-oriented, directional, and opportunistic thinking” (Goldman and Casey, 2010, p.210). Systems thinking (Senge, 1990; Mele, Pels and Polese, 2010) is a relational discipline that is incorporated into strategic thinking by some authors (Liedtka, 1998; Graetz, 2002; Bonn, 2005; Goldman and Casey, 2010) or is seen as complementary to it.

Other authors discuss the importance of a holistic perspective within strategic thinking, one that again emphasizes connectivity and relatedness (Liedtka, 1998; Bonn, 2001; Graetz, 2002). The literature on developing more sustainable environmental and societal approaches also takes a more holistic approach (Bradbury and Clair, 1999; Stead and Stead, 2000; Aragón-Correa, 1998; Hawken, Lovins and Lovins, 2005, 2007; Vaara and Durand, 2012; Husted, 2013). However, much of this literature is focused on commercial organizations and is not fully representative of strongly purpose and values-driven participant organizations, which embody a wide societal remit that *defines* their strategic processes. The intensity behind a relational approach is better captured by the literature on not-for-profit organizations (Drucker, 1989). A relational approach is interconnected at a deep level within the organization.

Participants widely shared a holistic view of the world and most were rooted in scientific disciplines, particularly ecology, biology and the life sciences, which share a recognition of the interconnectedness of life. This way of seeing the world strongly influences them and the organizations for which they work, particularly when they are in senior decision-making roles (themes 2 to 3, sections 4.13 to 4.14). However, it does not, necessarily, result directly in a more holistic strategic thinking process.

Senior participants (CEOs, founders and other key players) had a more direct influence on the strategic decision-making process, and the way in which they thought and perceived the world (their mindset, perspectives, worldviews, sensibilities, capabilities and intelligences) undoubtedly influenced the strategic process of the organizations. However, most participants focused on organizational purpose and core values, which often embraced these more holistic principles. The influence on the strategic process was thus more likely to be *indirect*, expressed through the purpose and deeply held values of the organization, which enable the collective action of the participants to make a difference in the world.

The strategic processes of participating organizations were complex, often informal, interlinked and were focused on *both* purpose and sustainability; one out of desire, the other out of necessity. The relational nature of the participant organizations is deeply embedded and participants often talked of this complexity. Mintzberg (1994) captures this when he talks of strategic thinking in terms of synthesis, complexity, subconscious elements, creativity and intuition. These make it inherently “difficult”:

“An immensely complex process, which involves the most sophisticated, subtle, and at times, subconscious elements of human thinking” (Mintzberg, 1994, p.111).

This description resonates with the way in which the participants chose to express themselves when they discussed the ongoing challenge and frustration that results from trying to ‘square the circle’ of achieving

core purpose and maintaining sustainability. There is a strong emergent quality to the strategic processes of participating organizations (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), of accumulated strategy-as-practice that has evolved to incorporate this complex dynamic (Whittington, 1996; Goldman, Scott and Follman, 2015) (research questions 1 and 2, sections 4.5 and 4.8). In short, a more holistic dimension is a part of the unique way in which the strategic processes of participant organizations have emerged. It is important but also part of a bigger whole.

4.11.8 Connection to nature: Definition

The definition of connection to the natural world that was adopted for the research study (chapter 2, section 2.9.3) was drawn from the nature-based literature:

‘A shared sense of identity, an experience of oneness, in part or whole, which enables us to love and care for the natural world and act on its behalf, recognizing both its extrinsic and intrinsic value’.

The participant data reflected this definition. Each component (shared identity, a sense of oneness, care and love for the natural world and a recognition of both extrinsic and intrinsic value) was strongly reflected in participant interviews and group events.

4.12 Theme 1: We are outsiders

Who are we? We are outsiders

We are passionate, committed and different. We also exhibit a deep sense of responsibility (stewardship) for the natural world, a strong sense of moral imperative (‘the right thing to do’) and shared underpinning values, which include a moral duty of care *both* for the natural world *and* people. Several of these themes resurface in other clusters of meaning.

4.12.1 The narrative

Participants often felt that they see things differently from other people. They share an insider’s outlook on the natural world, which includes an intimate (intrinsic) sense of connection as well as an appreciation of the life supporting extrinsic benefits (theme 2, section 4.13). This perspective differs from an outsider’s viewpoint, which tends to place greater importance on extrinsic value and is more dispassionate and focused on separateness rather than on connection (Vining, Merrick and Price, 2008).

Participants feel that they suffer as a result of this difference in perspective and the resulting knowledge that they carry (section 4.11.5; chapter 2, section 2.13) (McCarthy, 2009; Macfarlane, 2019a, 2019b) and have a strong shared sense of cultural identification. They feel they are “truth tellers” (section 4.4; Appendix C). One participant who operated a hybrid structure (partly charitable) was asked whether there was any significance in the order of the words he chose to describe himself, “naturalist, writer, businessman”. His response was, “yes, absolutely” (interview 12).

“There’s always this, ‘oh, do you think you trust them?’ ... it’s finding the right people and it’s harder because it’s [for] people like us, which gets a bit scary!” (BW5, group interview 33).

“There’s definitely a little bit ... us and them” (BW8, group interview 33).

Participant organizations have developed the ability to speak different languages to different people in order to bridge this gap in perspective (different worldviews and perspectives on life); a values-based language based on the inherent, intrinsic or innate value of nature within their extended communities of interest, which the researcher termed a ‘circle of identity’ (themes 5 and 7, sections 4.16 and 4.9) and a cognitive, analytical, evidenced-based language with the outside world, including funders and those in control of resources and policy (theme 8, section 4.10). This emphasises extrinsic value and the benefits of nature for humankind (and is often backed by scientific evidence). In other words, participants speak their own language amongst themselves but have learned to communicate with others in a language that the world understands. Both are essential to their financial survival as well as the achievement of their core purpose (themes 5 and 8, sections 4.16 and 4.10).

This theme is strongly related to themes 2 to 5 (sections 4.13 to 4.16), which *together* demonstrate the relational foundation of participant organizations (research question 3, section 4.11). They are strongly purpose driven (theme 6, section 4.6) and this strong sense of purpose and associated deeply held values, drive the strategic processes of the participant organizations. The literature associated with themes 1 to 5 is discussed in detail in section 4.11. However, the role that intentionality and commitment (or passion in the terminology of some participants) play in driving organizational performance, as part of a shared vision and/or strong values orientation is recognised in the mainstream strategic literature (Collins and Porras, 1996) as well as in the literature on leadership and the not-for-profit sector (Drucker, 1989, 2004). The role of intentionality within the strategic thinking process is also recognised (Liedtka, 1998). In addition, the role of ethics and morals in strategic decision-making (section 4.12.4) is also explored in the main body of the literature (Stead and Stead, 2000).

This theme is foundational and plays a key role in the nature of participant organizations as relational. It is critical to the participants’ sense of mutuality and shared identity (themes 2 to 4, sections 4.13 to 4.15) and collective endeavour (theme 5, section 4.16). It provides the foundation of a relational approach to strategy. When integrated with a strong sense of connection (themes 2 and 3, sections 4.13 to 4.14) and the desire of participants to make a difference in a practical way by working collectively and collaboratively (themes 4 and 5, sections 4.15 to 4.16) it is clear that the resulting purpose driven nature of participant organizations (including a strong sense of core purpose, mission, vision, values and culture) is reflected in the broader organizational literature (for example, Drucker 1989; Collins and Porras, 1996, 2005; Weeks, 2006; Schein, 2010). This literature is explored and discussed in more detail in research question 3, sections 4.11.3 to 4.11.8).

4.12.2 We are different

It was common for participants to regard themselves as odd, different from others. Many of them became aware of this difference early on in life (theme 3, section 4.14) and it was often expressed in terms of

their attraction to, and closeness with, the natural world. This strong and compelling connection with nature, something not normally shared by their peers, was expressed by one participant as a feeling that “sometimes I feel like I live on an alternative planet” (interview 10). There was a strong sense of being outside the mainstream:

“It seems like the majority think [*my attitude is*] silly. You do feel ... like a minority who gives, who cares enough to change, [*to*] make a change” (interview 24).

“It’s something that I’ve always *had* ever since I was a kid, I’ve been outside collecting worms and doing snail races and watching birds and things like that, so I probably wasn’t a typical [*kid*] growing up ... I’ve always had that connection with nature” (interview 2, researcher gender neutrality).

Many participants described how demanding and yet how compelling the choice to support nature was:

“[*I’m*] compelled to action because of that connection [*with nature*] ... because you certainly don’t do this for the money. You don’t do it for ... any other reasons other than being motivated by the feeling that nature deserves a better deal at the hands of humankind ... It would be easier for me not to give a shit because that makes life easy but I’ve tried that and I can’t not give a shit, and because you do give a shit you’re compelled to try and do something about something you feel is unfair, or unjust or whatever. So, yeah, I think that connection with nature compels me to be ... a champion for it as best I can ... trying to do your bit to leave a legacy” (interview 10).

This feeling of being different brings those working in the sector together and influences the recruitment process, how outsiders get into the sector. One participant [interview 3] expressed this in the question, ‘why me?’, where he questioned why he was drawn into such a close relationship with nature when he felt that his childhood had not been remarkable or so different from his peers. At the same time many participants did talk about drawing close to the natural environment during their childhood and developing a special relationship with important aspects of it. For example, one participant described how the South Wales landscape helped him/her through her/his childhood, providing a place of refuge and peace:

“I was brought up in South Wales, very unwillingly, but my escape from Welsh lessons, and singing lessons, was to get a pony from a local farm and go off riding in the Brecon Beacons, where nobody knew where I was and it’s that sort of rolling moorland, big skies and skylarks, just me and the pony and lots of sheep and bogs inevitably, and I was just, I was happy there ... it’s just developed from there really” (interview 36).

This sense of difference was sometimes expressed in terms of ‘we do things in our own way’, sometimes overtly expressed in moral or ethical terms, for example, acting in a way that is ‘right’, protecting or conserving aspects of the natural world because ‘it is the right thing to do’. When one participant was asked why she does what she does for a very modest financial return, she replied:

“Why do I do it? I don’t know, because I can’t do anything else, ‘because I don’t *want* to do anything else. I feel the benefits of what I do so why would I want to stop doing it? ... it’s like a magnetic pole” (interview 24).

Other participants remarked on how they had felt disconnected and odd, without quite being able to put a finger on exactly why. In an early interview one participant summarized this state of confusion:

“I felt very disconnected from people ... I felt I was very odd and I remember my sister saying, ‘you’re not normal, you’re definitely not normal’ [*chuckles*] ... and, not really being able to quite comprehend ... clearly I felt a bit different but I couldn’t really work out what it meant ... yeah... I

was a bit odd" (interview 1).

4.12.3 Passionate: Highly motivated and committed

The participants described themselves as 'passionate', 'highly committed', 'obsessive', 'driven' and other descriptors that indicated the high level of identification they had with their chosen work role and cause. Each participant was asked to describe themselves in three words and over one-third of the words (29 out of 81) described aspects of this quality; passionate (6), enthusiastic (5), committed (3), awkward/difficult (2), determined (2), busy (2), hard-working (2), highly motivated (1), dedicated (1), driven (1), obsessive (1), stubborn (1), dynamic (1) and forthright (1).

In short, what participants do is of the utmost importance to them, a "matter of life and death" as three participants put it (interviews 3, 16 and 25), and as "carrying a torch for nature" (interview 4). Passion is highly valued in the sector:

"I try to be balanced, measured, pragmatic, but, at the same time, you have to nail your colours to the mast so I suppose the counterbalance to fair is passionate ... [*it is*] my lifetime work. It's not a time-limited project" (interview 10).

A search for, and sense of, meaning and identity is critical to what participants do and who they are. What they do is much more than a job or simply a means of earning a living. Their work is part of who they are. Participants often expressed the underlying connection with nature as part of their identity:

"Why should we care? I don't know, a lot of people don't care and that makes me really angry ... I find it difficult when you drive round a corner and ... once there was a lovely meadow and now it's a housing estate and that actually ... pains me and hurts me ... that connectivity, you hurt nature, you hurt me" (interview 24).

The responses to the question 'why do you do what you do?' at one of the group workshops elicited similar responses:

"I do what I do because I absolutely love it and I can't imagine doing anything else" (W4); "I do what I do because every day in a small way, sometimes in a large way, we make a difference to people's lives and the environment and that matters to me" (W1); "I feel it's almost a kind of civic duty to do what we do, globally and locally, particularly with the sort of young people I work with" (W6); "Because this is my way of life" (W5), "Because, being out in the natural environment is very important to me individually, and being able to share that with the people in our project is equally as important ... our project is based around nature connectivity" (W2) (group workshop 20).

The high level of identification with their work manifested both in high levels of drive, enthusiasm, dedication, hard work and commitment and also in the shadow side of anger, suffering, sadness, frustration, loneliness and grief that participants feel as a result of the ongoing damage to the natural world and the seeming inability of humankind to change its destructive ways:

"If we took on board the entire horror of it all we couldn't possibly survive" (BW8); [*we're*] "so low on the agenda ... we're the minority" (BW7); "people are massively attached but empathy is painful" (BW1); "we are in a difficult transition period and we have to make difficult decisions and it is awful" (BW1); "we have hope ... but the media act as if people don't care" (BW5) (group interview and workshop 33).

Surprisingly, given this seriousness of intent, many of the interviews were marked by laughter, but this was more a protective mechanism as the researcher noted in an informal memo:

“Without exception all participants ... viewed our current relationship with the natural world as unsustainable. Some were angry, others displayed resignation and occasionally grief, but all maintained a determination and commitment to continue. Many were pessimistic about the future, some talking openly about Armageddon scenarios ... but surprisingly, many of the interviews (and group events) contained a lot of laughter, almost as if the seriousness of the topic and potential result of indifference was just too painful to discuss, laughter being a necessary safety valve to retain a sense of sanity. [*Changes to*] posture, speed, intensity and tenor, tone and loudness of delivery, the level of articulation and other body/speech characteristics were evident throughout the interviews when participants spoke of something that was important to them” [*for example, interview 7, where the participant’s voice trailed off into a whisper each time (s)he spoke of something of particular importance to her; section 4.13.2*] (Researcher memo note, ‘The prevalence of laughter’, February 2018, researcher italics).

Participants often opened up to the more negative and challenging aspects of their work, including feelings of anger, sadness, grief, isolation and a sense of disempowerment and not being understood; The expression, “we’re all just pissing in the wind” (participant BW3, group interview 33) was quickly endorsed by the other participants. Participants admitted to often feeling powerless, unheeded, struggling to be understood or heard by those in the mainstream of society. This appears to contribute greatly to the sense of being different, to being outsiders. There was a poignant sense of sadness at group interview 33, as the researcher noted in a memo after the event:

“The event was marked by a level of emotional response that does not come through in the transcript of the group interview alone. There were periods of sadness, even a palpable sense of grief (evidenced by some participants on the verge of tears [*at times*], a sense of isolation and disconnection from the mainstream world ... and an emotionally charged atmosphere) and raucous laughter... (as if this was an outlet for deeper emotions that participants may have found uncomfortable or inappropriate in the setting) ... [*and*] a noticeable presence of gallows humour, especially in the discussion around the current state of the natural world and the ... superficially light-hearted discussion on Armageddon” (researcher memo note, December 2017).

Almost all the participants had a strong sense of identity as scientists (or conservationists closely working with the natural world) and talked about the importance of using scientific principles (both philosophically and methodologically) to guide them through their professional lives and careers. Evidence-based conservation and practice (conservation backed by evidence and scientific methods) were also stressed as key to influencing public opinion, securing funding and effective communication in the mainstream world. This also contributed significantly to the participants’ sense of who they are.

4.12.4 Moral duty of care: We are values driven

Behind the strong passion, commitment and drive that participants exhibited was a moral duty of care, the foundation for many of their chosen careers and collective endeavours, Participants’ values lie at the core of what they do and are widely shared (theme 5, section 4.16).

Although participants were engaged in a wide variety of areas (across all aspects of the natural world; flora, fauna, landscape) and worked in many ways (including conservation, engagement, education and

outreach, advocacy, policy, direct action, volunteering and so on) this diversity was underpinned by strongly held shared values, which included the following key themes; a search for meaning and identity (section 4.12.3 above), a deep sense of responsibility as stewards (guardians or custodians) of the natural world (section 4.12.5), a strong sense of moral imperative ('the right thing to do') (section 4.12.6) and an acknowledgement that It is not just nature or people that is important, it is both (section 4.12.7).

4.12.5 Stewardship of the natural world

Participants take ownership of this sense of responsibility in their personal lives by acting it out within a specific purpose aligned to the natural world (fauna, flora, landscape, individual species etc.). This stewardship, being in service for the natural world, often had a strong ecological perspective, reflecting the participants' backgrounds in ecology and conservation, and a holistic orientation:

"I saw several examples of where a human had pulled out just one little piece of the ecosystem and it had collapsed and caused everything from massive coastal erosion and the loss of villages ... then a whole lake ... not ... maintaining the ecosystem, there were dozens and dozens of examples, but it ... doesn't get through to people" (interview 4).

"The key ... is around respect for ... nature and soil and environment is very important ... love, gratitude and respect ... Nature, nature for me ... I don't know the exact words, but it's like a God" (interview 6, native Japanese speaker).

4.12.6 Strong sense of moral imperative

Participants tend to have a moral and ethical perspective/imperative on nature. Frequently, when the researcher asked the same question repeatedly (the 'five whys' technique) participants would move through the rational, cognitive explanations (stressing positive and negative aspects of our relationship with the natural world) to a more foundational belief on the inherent value of nature:

"I think we have a moral responsibility ... we have this responsibility to care for the rest of the living organisms living on it" (interview 8).

"Wildlife needs a healthy environment to survive, and whether humans are here or not, I feel wildlife has a right to be here too because it's part of the planet that we live on" (interview 7).

"My values are that everything in nature is equally evolved ... we've taken different paths and we all have a role to play, a part to fulfil ... it's wrong for humans to be curtailing that through driving species to extinction, through devastating habitats and exploiting things ... unsustainably for our own short-term greed" (interview 11).

"I feel that the ... forest and all of the wildlife that lives in there, has a right to exist, absolutely" (interview 35).

4.12.7 Nature or people? Both

In addition to the strong connection with nature, there was an important thread of justice, fairness and equity for nature *and* people, often expressed in terms of fairness, compassion and empathy, justice and equity. There was a marked empathy for those people who are disenfranchised in our society (the underdogs); physically, socially and/or economically:

“For some people it is literally all they’ve got and it’s crucial ... it could almost be life and death ... if that isn’t important, then nothing is” (interview 25).

“We’ll take on any campaign. ... especially the unloved species ... we’re not selective about the species we defend. ... [*We do what we do*] because no-one else is ... it really is that simple ... we’re doing something that on-one else is doing” (interview 31).

“There’s a big element of fairness here ... all of these animals and plants and things ... were here before we were, we’re interfering with them, they don’t damage us ... they don’t wish us any harm ... yet, we do them quite a lot of harm” (interview 36).

Participants often talked in terms of nature and people as inextricably linked, part of one whole (theme 4, section 4.15). Another theme was the importance of *all* living beings, human and non-human, being valued and given equal dignity and respect.

4.12.8 Collective purpose and endeavour

Participants often talked about engaging others and a sense of purpose in collective, collaborative terms, the importance and satisfaction of working together; “we all started as volunteers” (interview 3). This is closely linked to how participant organizations achieve what they do (theme 5, section 4.16).

4.12.9 Gaining trust as an outsider

Gaining participant trust was an important part of the research process. Showing commitment (for example, interviewing participants in situ throughout the UK) and having a relatively sound grounding in the life sciences combined with an affinity for the natural world, helped to build trust.

The researcher noted, whilst transcribing the individual interviews, that once trust has been built there was often a distinct shift from cognitive, analytical language (with concomitant discussion of the many benefits of nature from an extrinsic perspective and the dangers of our current disconnection with nature in terms of our own survival) to more personal, values-driven language with an emphasis on the inherent value of nature, in, of and by itself, and a marked increase in the willingness of participants to discuss the seriousness of the current environmental crisis, the likelihood of disastrous, often life threatening outcomes and the personal feelings of sadness, anger, grief and isolation from the mainstream that appear to form the shadow side of the highly committed, passionate, driven and sometimes obsessive desire of participants to support the natural world and make positive changes through our connection with it.

4.12.10 Key linkages

A sense of being different, of being an outsider, is key to the strong sense of affinity and bonding that underlies participant relationships. The experience of having a connection with the natural world that is *not* shared by others in the mainstream, of being an outsider, of not being understood fully by others and having a different value system and worldview has profound implications. It can be isolating, frustrating, disempowering and provokes anger, grief, sadness and pain. However, when combined with a powerful,

life affirming sense of connection (themes 2 and 3, sections 4.13 to 4.14) it also fuels a determination to *do* something practical about the situation (theme 5, section 4.16) and the determination, courage, obsessiveness, stubbornness and commitment that is necessary to attempt to overcome the significant challenges involved.

This underlying dynamic is key to success when like-minded individuals group together within purpose driven organizations in order to make a difference (theme 5, section 4.16) and contributes to the ability of participant organizations to punch above their weight by leveraging their resources through an aligned sense of purpose based on a shared connection with the natural world, extended into external communities of interest and firmly embedded within the organizations' strategic processes (research question 2, section 4.8). The capacity to speak different languages to different stakeholders with very different worldviews is also key to the successful implementation of strategy and the achievement of purpose (themes 6 to 8, sections 4.6, 4.9 and 4.10).

4.13 Theme 2: Something inside so strong

What makes us what we are? Something inside so strong

What makes us what we are? We are deeply connected to nature, both as something beyond us and something deep within. We have a multiplicity of forms of connection to nature (perspectives) including 'hearts and minds' and a deeper, more holistic sense of connection. We also have a diversity of specific entry points into this relationship but we share a common experience of that connection process (theme 3, section 4.14).

Participants also extensively discussed the value of nature to them and to society at large when they discussed *what* they did and, particularly, *why* they did it (theme 4, section 4.15), which stresses the extrinsic benefits of nature and other aspects of a more cognitive, analytical perspective of our relationship with the natural world as well as the intrinsic, inherent value of the world in terms of a place of awe and wonder, which is bigger than us and provides healing, inspiration and a sense of abundance (theme 4, section 4.15).

The participants' story is supported by participant quotations to convey the depth and richness of the data. There is a brief review of the theoretical context at the end of narrative summary (section 4.6.1), which is referenced to the main review of the literature in section 4.11. However, this is kept brief to avoid undue repetition and allow the participants' story to flow more effectively.

4.13.1 The narrative

The sense of connection of participants to nature was not simple but it was very strongly felt ('something inside so strong'). This theme focuses on how participants perceived their connection with the natural world (a more theoretical perspective) and why this is so important to them. Theme 3 (section 4.14) focuses on the nature of the connection process itself (a more experiential perspective).

Participants have a deep and abiding connection with nature. However, the expression 'deep connection' with nature does not convey adequately the importance of that connection to them. It is an important part of who they are, of their identity (theme 1, section 4.12). The sense of power within that connection is expressed in the title of the theme, 'something inside so strong', which is based on a song written by British singer-songwriter, Labi Siffre, about apartheid in South Africa and the inner strength and self-belief, born of a deeper connection, that allowed those who had suffered from apartheid to stand in the truth of who they really are. This seems to capture the power that the participants find in their connection with nature. It goes to the root of who they are.

The semi structured nature of the research interviews allowed space for the participants to talk about what interested them most around the formal research topic. What interested them most, almost without exception, was the nature of their connection with natural world itself and the crisis that has resulted from a perceived disconnection with nature in the mainstream world:

"Connection to the natural world [is] ... what this [organization] ... is all about" (interview 4).

The connection with nature is of fundamental importance to participants and, in many cases, it is intimately connected with their sense of identity and purpose in this world. Often, the interview transcripts resemble a river, where the natural flow of interest for participants is the connection process itself and the need for action in a time of environmental crisis. The strategic questions asked by the interviewer almost served as blockages at times, which circumvented this natural flow of interest until participants found a route around the 'blockage' to return to their natural focus of attention. Like all of us who are trying to change our behaviour in some way, they acted like recidivists, returning to their comfort zone.

Given that the participants had unique, diverse and very personal experiences of their connection with nature (theme 3, section 4.14) it is, perhaps, surprising that it can be described in relatively simple terms. It was seen as both something beyond us and something deep within us, and as something that is connected to the whole (perhaps reflecting the scientific and ecological training and background of most of the participants):

"There's something deep within our psyche that connects us with what's going on in the environment and sometimes it's just about getting people ... into that situation where there's connectivity" (interview 21).

For other participants, each in their own way, reflecting their individual personality characteristics and preferred ways of thinking, feeling and seeing, this connection was expressed across a broad spectrum of perspectives: cognitively and rationally ('head based' or 'mind based'), affectively and through relationship ('heart based'), instinctively and through the senses and/or gut, or behavioural, notably working physically within nature ('body based') and through the relationship/connection to the whole (spirit based or inner knowing).

These multiple perspectives of connection are commonly abbreviated in the environmental sector to the expression 'hearts and minds' to emphasise the importance of winning over both head and heart in order

to engage potential supporters (for example, interviews 19, 28, 31 and 37). Participants also talked about a sense of deeper inner knowing (holistic knowing) that connects them to the whole, which is distinct from both cognitive and affective perspectives and may be at odds with them, particularly a more rational, cognitive approach to connection. Given that many participants are scientists (ecologists or trained in the life sciences) or conservationists it is not surprising that most of them emphasised the holistic nature of their connection, the idea that we are a part of nature not apart from it.

This theme is strongly related to themes 1 and 3 to 5 (sections 4.12 and 4.14 to 4.16), which *together* demonstrate the relational foundation of participant organizations (research question 3, section 4.11). They are strongly purpose driven and this strong sense of purpose and associated deeply held values, drive the strategic processes of the participant organizations.

The mainstream literature on the natural world and the environment is focused on the commercial sector, primarily on sustainability and developing an awareness of environmental issues within the strategic process (section 4.11.3). There is, however, a strong strand in the academic literature, which relates to a connection with the natural world (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009). The participant data resonates strongly with this literature, particularly the dominance of a relational aspect to that connection (sections 4.13.4 to 4.13.7) and the value of nature expressed in terms of both extrinsic *and* intrinsic value, with the latter often dominant (sections 4.13.8 to 4.13.10). This is explored in detail in research question 3, section 4.11.4. The more general nature writing literature (Mitchell, 2002; McCarthy, 2009; Oliver, 2009; Nicolson, 2013; Macfarlane, 2019a, 2019b) also reflects these themes (sections 4.11.4 and 4.11.5).

This is complemented by the literature on multiple intelligences (and the adaption of this concept within the business literature), which the research participants described more as sensibilities or characteristics (head, heart, body and spirit) (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011; Mintzberg 1994; Goleman, 1996, 2004; Zohar and Marshall, 2001; Minocha and Stonehouse, 2007). This is also explored in research question 3 (section 4.11.4), which looks at the relational view of strategy within the theoretical context of the broad body of the literature in more detail.

4.13.2 Core elements of connection

Although participants connect with nature in both cognitive and more embodied senses, they use different languages to speak to different stakeholder groups (theme 1, section 4.12); a values-based language based on the inherent, intrinsic or innate value of nature within their extended communities of interest and a more cognitive, analytical evidenced-based language with the outside world, one which emphasises extrinsic value and the benefits of nature for humankind. Participants switched between these two 'languages' frequently during the interviews and often held both perspectives simultaneously.

4.13.3 Mind connection

Head-based or mind-based: cognitive, mental, rational and analytical.

Although non cognitive forms of connection were often deeply important to participants (sections 4.13.4 to 4.13.7) they also shared a strong ecological, scientific perspective, seeing the world as inherently interconnected, as an organised whole (or gestalt) that is more than the sum of its parts. This whole is systems-based (or whole systems thinking) where the whole includes human beings, who are, therefore, not separate from it. This undoubtedly reflects their education, scientific background and training. This ecological perspective looks at the world as an interdependent web of animal, plant, fungal and bacterial life and is often expressed cognitively:

“It’s all about being part of the environment yourself and remembering, reminding, remember that you are” (interview 27).

“To me, [*the holistic, ecological perspective*] means to understand that you’re a part of it ... not separate from it ... that to have dominion over it is not necessarily the best thing for humankind. I think a lot of people have lost that or don’t think we are part of it [*but*] I, having been trained as an ecologist, I see that connection ... It’s partly to do with the feeling that people are superior over the Natural World. We can control it, we’ve demonstrated that we can control it, but then we [*are*] also starting to see places we can’t control it [*speaks softly and quietly*] and disasters happen ... ” [*silence*] [*tone of voice and silence indicate the strength of feeling of the participant*] (interview 7).

“I have seen first-hand, I know how easily, how quickly and with how little thought ... things that I value, have valued and have known can be lost. And how difficult ... how time consuming and unpredictable the reverse of that process is. So, restoration of habitats is fraught with difficulty, is expensive, time consuming, the outcomes are often not the ones you are looking for” (interview 3, with a focus on practical application as well as personal feelings).

This emphasis by participants on the criticality of the ability to see and act from the perspective of the whole is one of the defining features of the research data:

“To try and see it for what it is, to appreciate that they are all parts of a whole, not just the geology or how the geology got to be, but its relationship to the whole natural world ... an holistic, planetary approach, if you like ... you can maybe study one little section but it’s all part of a whole ... a lot of people ... are very much biodiversity driven. But we [*geologists*] have a saying. We say, “there is no biodiversity without geodiversity. One depends on the other very, very, very much” (interview 13).

Participants have chosen to work with the natural world and to *do* something practical and this focus on action was also fundamentally important to participants, who linked a holistic perspective of connection to purpose and practical action:

“[*The organizational mission*] is very simple but it includes ... the whole ecosystem that they are part of! And it is, of course, anything but easy” (interview 28).

“You might just want to run away. I think that might be some people’s reaction, it’s too difficult ... that’s the point where connectivity breaks for them ... it’s too big a problem ... it starts with the personal, you have to have that worldview perspective, and somewhere you choose ... to do something about managing the relationship between yourself and between others and nature” (interview 14).

A holistic ecological perspective was also linked to the ability to move away from a perspective that is self-referential (humans as the central point of reference) with meaning attributed from a human-based or anthropomorphic perspective, to something bigger than us or beyond us. In other words, the reference

point becomes the whole itself, which may then be interpreted from the personal experience and belief systems of the participant him- or herself. This moves the perspective from a cognitive, analytical framework to a more embodied sense of knowing (section 4.13.6).

4.13.4 Emotional or relational connection

Heart-based: relational or 'in relationship' with nature, affective, an affinity with nature, visceral, people 'feel it', 'get it', it is part of who they are.

Participants often expressed a strong relational connection with nature (emotional or affective). This was true even of some of the participants with a more cognitive focus. For example, one participant shared a quote from Chief Luther Standing Bear, which had significant meaning for her/him:

"Without nature the human heart becomes hard' [*original quote, 'we knew that man's heart, away from nature, becomes hard'*] ... that, I think, is what I've been trying to get to the heart of. That's, fundamentally, one of our aims is from the heart isn't it, the connecting [of] people, improving wellbeing' (interview 26).

Many other participants talked directly about the primacy of their emotional relationship:

"Almost the most important thing is in the emotional engagement and an emotional connection because what we're trying to do is to get people to be inspired and for people to care ... I think its hearts and minds so ... it's about that emotional connection, [*it*] is a very important starting point" (interview 19).

"[*I have*] a deep ecology perspective ... a Gaia bio-centric perspective ... a deep, deep resonance at the heart level ... following my heart and allowing more of what I deeply care about to come alive in my work ... and that is where I find my happiness then because I can be myself" (interview 11).

"I don't intellectualise my relationship with nature. I never have done. It's an emotional thing" (interview 35).

One Japanese speaking participant gave a practical example of the importance of a relational connection with nature from his work as a practitioner (General Manager) of natural agriculture, which is based on a philosophy of an overriding respect and concern for the natural world; "love, care and respect" (interview 6). He recounted his experience (which may seem strange to our modern mindset) of what happened after a heavy aphid infestation:

"Natural agriculture doesn't use fertilizer, pest sprays, so that is why, what I did is, I touch the soil and then I spoke to the soil. What I said is 'thank you soil and please help tomato' and I also spoke to the tomato, 'thank you for tomato, you are growing very well, even this colder weather, please produce tomato'. Then I spoke to them one minute every day. Then after, two weeks later, all aphids gone. And then, in 2012, open farm, a hundred people came from the neighbours. The neighbours are surprised. So most of them couldn't, was not able to produce tomato but our tomato growing very good. [*laughs*] Yes, so, I think this is interesting story how human heart influence on growing the vegetables." (interview 6, native Japanese speaker).

4.13.5 Connection through the senses

Body-based: physical and behavioural component, most commonly including 'gut feelings', intuition,

perception through the senses and the joy and pleasure associated with working or being in nature, often in a practical context.

One participant described this body-based perspective as being part of the whole in physical terms:

“looking at, touching, smelling, whatever it is, sensing ... being in a place, being in contact with something physical or biological that’s not part of [you] ... that’s not you but is, in some way, [you’re] making a connection with it” (interview 3, researcher italics).

Other participants expressed a sense of connection with the natural world in terms of how it affected their physical bodies and senses. One participant described how he knew a decision or a situation was wrong:

“[It’s] in your stomach, it’s as simple as that. It’s in your stomach ... it’s a physical, emotional reaction to something ... that’s exactly what it is. And there’s no thinking going on ... there’s no conscious thinking going on, there’s just this is wrong, something’s got to be done about it ... this is profoundly wrong ... this is not how humans should be ... yes, it’s definitely there, it’s just where my intestines start” (interview 35).

Other participants echoed this in their decision-making process, often in the context of gut feeling or intuition and their preference for action over thinking:

“You have to go with your gut instinct and accept the fact that sometimes you’re going to be wrong” (participant 9).

“I don’t even think about it you see ... I just do it” (interview 36).

Connection to nature through the senses often has a very earthy, practical quality, and it often born of a deep love of working in the natural world. One very practical example is the typical reaction of young high-school students when visiting the gardens of one of the participants:

“What can you do in one hour with a group of raging 15-year-olds who ... when they get out of the bus, throw themselves on the grass and roll around like they’ve been released from... [laughs] but by the end of the hour ... their eyes are bright and they say, ‘wow’” (interview 4).

4.13.6 Deeper knowing

Spirit, philosophical or soul based (inner knowing). Deeper or ‘inner’ aspects of connection, an inner voice or deeper way of seeing, thinking or knowing that is somehow related to the whole, provides a sense of wholeness and integrates deeper knowledge from within; often described as some form of whole making.

Many participants acknowledged an inner sense of knowing that directly influenced why they do what they do and how they make decisions:

“I’m just absolutely lucky because I can connect, I’m very connected to it, ... I’m fortunate in that I’ve got this link with nature and so that transforms into my thinking about the way this business develops and everything” (interview 18).

This inner knowing is something that is not inherently subject to rational and cognitive reasoning or understanding but is very important to the participants:

"[*It is*] largely ignored or marginalised ... [*but*] latent in every person. I think it's a biological reality" (interview 11).

Participants generally acknowledged *both* this 'inner voice' that speaks below the level of rational consciousness and the value of a rational, cognitive approach in appropriate circumstances. Not either/or but both (section 4.13.7; theme 4, section 4.15). One participant, for example, used the principle of the reflective practitioner to demonstrate how people in environmental field work or organizational positions might train themselves to be open to both sets of qualities or multiple perspectives (interview 26).

This ability to recognise multiple perspectives may be influenced by the ecological mindset of many participants who see the world as inherently interconnected, an organised, systemic whole and express this using *both* a scientific mindset *and* a broader sense of 'inner knowing'. Participants would often express the validity of scientific principles, but then go on to acknowledge the importance of a sense of knowing that extends in important ways beyond rational thinking. One participant discussed the value of "not thinking", which recognises the value of bypassing the cognitive, analytical thinking process at times:

"The most creative, useful ideas I've ever had have been when I'm not thinking about them and I think a lot of people operate on that level ... I think that's quite common ... I don't know why that is but it seems to be something that happens ... stop thinking about it and then the answer will come" (interview 35).

Some participants overtly acknowledged the value of a spiritual perspective or referred to the sacred nature of the natural world (including the essence of spirit of a place) or the oneness, the interconnectivity of all things:

"[*There's*] nothing wrong with talking about spirituality or feelings ... I find a lot of people ... say 'oh well, that's not scientific' ... I think there is a problem with the way our society is brought up perhaps to ... artificially divide things up" (interview 15).

"The very fact that we are working in Scotland is that we have a connection with this place, the people, the wildlife ... [*we have an*] emotional and spiritual connection' (interview 10);

"Humans [*are*] one [*with*] nature ... already connected and anytime connected" (interview 6).

"I feel that ... the place can say ... 'help, I don't want this, I don't like this, you know, I'm not comfortable' ... you've got to be sensitive enough to know what actually is right for [*the place*] and what isn't right" (interview 18, researcher italics).

Many participants placed a strong emphasis on being in service in the world, often in a stewardship role, sometimes linking this to an ecological perspective of connection (section 4.13.3) or to their own spiritual belief systems (for example, interviews 5, 32). In many cases inner knowing was linked to ethical and moral statements (sections 4.12.2, 4.12.4, 4.12.6), often a sense of 'it's the right thing to do' and sometimes participants gave examples of how inner knowing had precipitated direct action:

"I had this overwhelming sense that the land and the trees were calling out for help, not that there was a voice, or a message or anything. It was just the feeling I got. Why isn't somebody doing something about this? This forest is dying, it's going to disappear. And after two or three years it started to dawn on me, well, maybe, this somebody is me!" (interview 11).

"[*There is a*] fundamental value system across Western society ... that recognises the rights ... not only of human beings that might be different to us but also ... other living organisms that are

obviously very different to us but nevertheless are entitled to a life free of cruelty and persecution" (interview 10).

The language used by participants often reflected their unique personal circumstances. One participant referred to the Welsh words that describe aspects of our connection to the natural world; *hiraeth*, *cynefin* and *fy milltir sgwâr* (see discussion in section 2.13.1). These words cannot be translated directly into English in a cognitive sense, because they rely on a broader/deeper sense of belonging and connection, often associated with an *experiential process of living them*, not easily reduced to a simple process of analysis. Participants often struggled to explain their connection with nature in words and sometimes got muddled in their descriptions (for example, participants 22, 24, 32) or were embarrassed about the strength of their feelings; "I know it's silly" (interview 24).

The participants' body language, emotional intensity and conviction, however, spoke clearly of the importance of their connection to nature to them. Sometimes it was easy to miss indications of this deeper connection, which crept into the participants' language, for example, the use of the word, "soul" by some of them (for example, interviews 11, 33 and 37). The extent to which participants talked about this inner sense of knowing was evidenced by an early word cloud visual representation of the coded data in June 2019. Although this was flawed (many general words were not removed from the analysis) the word "know" was very prominent, even at this early stage in the coding analysis, which is indicative of its importance (Appendix E, section 1.1).

4.13.7 Bringing the perspectives together

During the research process the researcher reflected on appropriate names and descriptions for themes (or broad coding categories) that captured the essence of the non-cognitive perspectives (for example, embodied knowing, corporeal or all-body connection) and the full diversity of the experience of the participants. However, the participants never used such terminology themselves, preferring a simpler terminology such as inner knowing (or intuitive knowing).

As a result, the spectrum of connection might be best described as 'hearts, minds, body and inner knowing'. It is also very clear from the data that, whatever terminology is used, participants had a deep connection with nature, which was complex, reflected upon, expressed cognitively, felt, sensed and known at many levels. Participants were diverse and each one expressed a unique mix of these elements. However, in all cases the sense of connection was deep and contributed to the passion, commitment and certainty that empowers the participants to move towards their collective goals.

When participants discussed their connection they did not always differentiate the different sources of that connection. The sensibilities come together, perhaps with a preference for a particular way of perceiving. As the Greek American art teacher, author and artist, Kimon Nicolaïdes, observed in another creative field, one that similarly draws from a holistic mindset:

"Learning to draw is really a matter of learning to see – to see correctly – and that means a good deal more than merely looking with the eye" (Nicolaïdes, 1941).

4.13.8 The value of nature: Extrinsic and intrinsic value

Participants talked about their connection to nature in terms of both its inherent, intrinsic or innate value (its value in and of itself) and its extrinsic value (the benefits that it offers humankind). There was a clear pattern in the research interviews, where many participants moved from discussing extrinsic to intrinsic value over the course of the interview (and sometimes after it):

“Participants often began interviews talking in terms of extrinsic value but switched to intrinsic value as the interview progressed (and the level of trust deepened and they became more comfortable). On some occasions, participants demurred from earlier comments by making disparaging remarks such as “all that stuff” (interview 4) or indicated in other ways that external benefits were not the ... primary motivator, rather a device to appease the external world ... it was taken for granted that these [*intrinsic*] benefits existed; what was being questioned was the need to [*put an external*] value on something [*that was to them*] so intuitively obvious” (researcher interim memo, June 2019, researcher italics).

Participants also talked extensively of extrinsic and intrinsic value in relation to their work when they discussed what they do and why they do it (theme 4, section 4.15). Although this results in an element of duplication it places the further participant feedback in this area within the context in which it was discussed.

4.13.9 Extrinsic value

Almost all participants talked about the extrinsic value of nature, the multiple benefits that the natural world offers humankind (temperature control and balance, clean water, carbon storage, pollution and flooding controls and so on), although many did not like terminology that expressly put a value on these benefits (nature capital, eco-system services etc.):

“Natural beauty, of course, is a classic example of something, which will always defy attempts to monetise the value question” (interview 3).

Specific eco-system services were often linked to broad statements about the critical importance of nature *overall* as humanity’s life support system. One expression used in the environmental sector that both captures this fundamental life relationship and reflects the tenor of the participants’ views is that “without ‘them’ there is no ‘us’ ” (theme 5, section 4.16).

Participants clearly recognise the fundamental importance of these extrinsic benefits and it is a very important element of why they chose to do what they do (theme 4, section 4.15), the way in which they do what they do and how they communicate that to the outside world. However, whilst both intrinsic and extrinsic value are both considered fundamental and interconnected (as part of a greater whole) it was very common for participants to state that their sense of connection was *not* dependent on extrinsic value, and that nothing would change if it didn’t exist. A significant number of participants also queried how extrinsic value is measured (or whether the benefits of nature can really be measured at all). In a number of interviews participants retracted or modified previous comments on the value of eco-services or natural capital, and some had strong views on the limitations of these concepts:

“To monetise nature is ... not the answer ... [*it’s*] making that connection [*that*] your life depends

on it in ways that you can't put money on it ... If we can't get to that, it will always ... have a value and if something else is more valuable it will go, because the more valuable thing will ... happen" (PW4, group interview 37, full quote, section 4.6.2).

Only one participant stated explicitly that (s)he did not believe in the concept of intrinsic, inherent value but, again, this did not diminish his/her passion for supporting the natural world or, in her/his view, change the practical nature or reason for supporting nature:

"Inherent in what way? Well, because we're here and we say it has a value! ... [*however*] it doesn't, to me, diminish our responsibility for nature [*and*] I know I'm probably in a minority ... in nature conservation ... For me that's a powerful connectivity between us, as part of nature ... rather than say we are sitting outside of nature ... If we put ourselves within nature and say, nature has a value to us for all these reasons, I think that's a much stronger way of looking at things" (interview 14).

4.13.10 Intrinsic value

Although participants talked about intrinsic or inherent value in a wide variety of different contexts the underlying ecological perspective of interconnectivity (all elements being linked as one whole) was a dominant theme, often linked to a sense of duty to protect both the parts (the focal work of the participants' organizations) and the natural world as a whole:

"[*The species is*] important in their own right ... personally, and obviously a lot of people working in conservation, we feel they have intrinsic importance ... they're a living creature ... they have as much right to be on this earth as we do ... as a living organism I believe that they have the right to exist ... you've got to see things from an animal's and world's-like view of the world, from their perspective, and think about the challenges that they have and what they need to be able to sense and understand, to be able to understand their intelligence ... And the same with their wetland habitat, it's part of our country. I think It's what makes our landscape valuable" (interview 32).

This participant spoke extensively about the need to understand an animal's perspective or intelligence from their own worldview ('*umwelt*', derived from the German word for 'environment'). *Umwelt* is the concept of looking at the world as a specific species would see it, the conception of its environment, (*umwelt*), developed by the Estonian physiologist and biologist Jakob von Uexküll (1864-1944). Uexküll's core idea is that the *umwelt* of animals and humans is a species-specific subjective construction. In other words, when participants talked about inherent value they were moving away from seeing the world from an anthropocentric or self-referential human perspective (subject to object) into a broader, more holistic, perspective, where non-human beings are treated with dignity and respect, and in some cases, explicitly as equals (subject to subject).

These views, particularly those that touch on justice and equity, are often held deeply by the participants. The imperative statement in the quote above is important, "*you've got to see things from an animal's ... perspective*" (researcher italics) and, similarly, an earlier statement made by the participant that the act of setting up the charity was "*a labour of love*" for the founders (interview 32).

Several participants talked about humanity's perceived separation from nature as an illusion:

"The myth of progress, the myth of human centrality, and the myth of our separation from nature"

(interview 9, scientific community website referenced by the participant).

Separation and a disconnection with nature were often linked together in terms of the escalating environmental crisis. Other participants referred to the egocentricity and self-referential nature of human beings in terms of their relationship with the natural world, for example, the difficulty of securing a radio interview to talk about a species in free fall because:

“They weren’t interested unless there was a human angle ... it had to be about, if we lost [*the species*] how would it hurt [*us*]? It’s like if we lost [*the species*] we’d lose [*the species*]!” (interview 28).

For participants, with such a strong ecological perspective, the underlying linkages were often self-evident; everything is connected, including the fact that whatever happens in nature will have an impact on humankind:

“I think it’s wrong to be self-interested to the detriment of the natural world ... it’s short-sighted ultimately, that’s what it comes down to” (interview 28).

Participants all acknowledged some form of inherent value in nature, although they chose different ways to interpret what that meant in practical terms. Different roles (species or landscape conservation or restoration, advocacy, policy campaigning, animal welfare, stewardship) brought out different nuances, with some participants emphasising the complexity of applying this in a practical, everyday working context:

‘Finding ways to think about and make use of the value of these special qualities [*of nature*] and how they are used and interacted with by people, it all really ties together from there, is the challenge for me every day’ (interview 3).

Participants often linked the extrinsic and intrinsic value of nature together. Both are important. This is also very common in the environmental sector as a whole. Alistair Whyte, Head of Plantlife Scotland, stressed both extrinsic and intrinsic value in his blog on protecting Lindenberg’s featherwort (*Adelanthus lindenbergianus*):

“All species are important, be they polar bears, fen orchids, or Lindenberg’s featherwort. We really can’t afford to lose any more species through our actions, and if we can do something to look after a tough little liverwort that’s made its home on a wet and windy mountaintop on the wrong side of the equator, then surely we *should*’ (Whyte, 2019, research italics).

4.13.11 Key linkages

The powerful, life affirming sense of connection expressed by participants contributes to their collective ability to make a difference, founded on a shared sense of purpose, which drives the underlying strategic processes (research question 3, section 4.11). Participants expressed the value of nature in *both* extrinsic and intrinsic terms but it is the latter that is most closely associated with the feeling of being outsiders (theme 1, section 4.12).

Participants expressed their connection with the natural world in a variety of ways (cognitive, emotional, intuitive and a deeper sense of knowing) reflecting their different personality characteristics, experiences

and life perspectives and they also discussed the *specific* connection process, how they came to be connected in this way. Although this connection process reflected the very wide diversity of ways in which the participants supported the natural world, they described a *common* process, one that allows them to share a sense of identity in relation to the natural world. In other words, a universal sense of meaning is found within the specificity of the connection process and its practical implementation (theme 3, section 4.14). This shared experience is key to the participants' ability to work together successfully within purpose driven organizations in order to achieve their objectives (research question 3, section 4.11).

4.14 Theme 3: This time it's personal

What makes us what we are? This time it's personal.

What makes us what we are? We have a deep and abiding connection with the natural world through our diverse but common (shared) experience of the underlying *process* of that connection with nature. We have a multiplicity of different entry points into a connection with nature, including 'hearts and minds' and a deeper, inner, sense of knowing (theme 2, section 4.13) but we share a common *experience* of the process of connection. In the specific we find the universal (Rohr, 2016, 2018; Cameron, 2017).

4.14.1 The narrative

The connection process to nature described by participants is very specific (all participants had different and very personal 'entry points' into the experience) but also universal (the participants expressed this in terms such as 'we get it', 'the thing', 'the spark', 'the hook', 'the trigger'). It is this shared experience that helps to bind them, which underpins an aligned sense of purpose or common cause. It is a shared personal experience of great importance to them, which also feeds into their personal and collective sense of identity. With some participants this was expressed as much in terms of people as nature (a strong ethical sense of fairness, equity, justice, compassion and empathy; theme 4, section 4.15). For others it represents a fundamentally different mindset, entering into a subject to subject relationship with the natural world, rather than the more familiar subject to object relationship common in the wider world (Vining, Merrick and Price, 2008).

Participants expressed this shared connection through all aspects of the natural world (flora, fauna, landscape, animal welfare, the relationship of people and nature) regardless of their professional experience; scientific (ecologists, botanists, geologists, physicists), managerial (executive, management, project or field capability), entrepreneurial (founders, visionaries), sheer, naked passion and commitment (very common in animal welfare and campaigning organizations) or a mixture of some or all of these aspects. In short, it is a way for participants to access a sense of universal meaning through the particular (Rohr, 2016, 2018; Cameron, 2017).

The overarching theme, 'this time it's personal' (originating from the *Jaws* movie franchise) expresses the power of this connection process in a simple jargon-free way. It attempts to capture the pivotal role that the shared experience (mutuality) of this intensely personal connection process plays in translating (or

energising) the depth of the connection with nature felt by participants (theme 2, section 4.13) into a shared passion and purpose that makes a difference in the world. It fuels *how* participants organise and makes a difference in their chosen fields of endeavour (theme 5, section 4.16).

This underlying bond between participants was evident at the group workshop events despite the fact that participants came from different areas, had different expertise and sometimes held different views. In one of the workshops a participant (with strong views and a history of challenging the established environmental community) was initially treated with some caution by the other participants but moved from the position of 'outsider' to 'insider' relatively quickly as it became evident that strong common values were more important than superficial differences. This is a specific case of the acknowledgement of being part of a greater community, those who 'get it' (section 4.13.5); those who are closely connected with the natural world, know what is happening to it and are passionate and committed to *do* something about it.

In contrast with the other themes, the concept of specificity that emerges (section 4.14.2) is not well represented in the mainstream business or strategic literature, although it is recognised as a philosophical or spiritual principle (Rohr, 2016, 2018) and/or within the context of creativity and the arts (Cameron, 2017). It is also supported by the literature that summarises the specific research on the nature of the connection process to the natural world, which looks at the cognitive, affective and behavioural elements of that connection process (chapter 2, section 2.12.2).

This literature argues that connection with nature is affective and *experiential*, a sense of *oneness* (Mayer and Frantz, 2004, p.504) and *implicit*, even outside of conscious awareness (Schultz et al., 2004, p.31). The implicit nature of connection, the sense of 'oneness' (Kals, Schumacher and Montada, 1999; Clayton, 2003) arises from *within* us; "the dissolution of boundaries and a sense of a shared or common essence between the self, nature, and others" (Dutcher et al., 2007). It represents the universality within the specificity, which indicates why it is so important to participants.

Participant organizations fulfil their purpose by reaching out and engaging others who feel the same way about the natural world as they do (themes 5 and 7, sections 4.16 and 4.9). The shared experiential process of connection is critical to this process:

"At its core it is a very simple idea: the more people *experience*, connect with, and share their *love of nature*, the more support there will be for its conservation" (Brooks, 2016, researcher's italics).

This theme strongly relates to themes 1, 2, 4 and 5 (sections 4.12, 4.13, 4.15 and 4.16), which *together* demonstrate the relational foundation of participant organizations (research question 3, section 4.11). They are strongly purpose driven (theme 6, section 4.6) and this strong sense of purpose and associated deeply held values, drive the strategic processes of the participant organizations. The literature associated with themes 1 to 5 is discussed in detail in section 4.11.

4.14.2 Concept of specificity

The importance of specificity is more commonly acknowledged in areas outside the business world, for example, the creative arts. A song by a singer-songwriter, such as Adele, is capable of communicating the heartbreak of a *specific* broken relationship to millions of people in a universal way that a psychology lecture is (normally) unable to replicate. The specificity of a personal story or narrative, combined with a deep sense of connection, is a powerful thing and this came through in many of the participant interviews. However, the links between the strength of this connection and the bigger picture, including the strategic process, are *indirect* and inherently relational, and thus not always clearly visible, as the following extracts from one participant (interview 27) illustrate:

“We do get focused on doing these [*little*] things and you get focused ... on looking after one poor little Pipistrelle bat that’s got a broken wing or something”.

“We had an interesting conference this year and somebody ... decided to have a debate on ‘what’s the point of bat groups?’ ... and I offered to speak on behalf of bat groups ... and [was] really wondering how somebody was ... going to speak against it. ... His point was that in the political environment we’ve got at the moment we shouldn’t be focusing on small things, we need to be getting together and looking at how wildlife conservation legislation is going to go because there is ... potentially a real threat to it at the moment”.

“I suppose I do spend some time doing the ... more strategic stuff but it’s not as much fun” (interview 27).

Although the participant’s organization was small, (s)he was involved strategically at multiple levels (local, regional, national and international) in a leadership and collaborative capacity. Whilst (s)he struggled to elucidate *why* the specific and individual aspect of the work was so important in an organizational sense (given an understanding that strategy is concerned with the big issues, illustrated by the conference debate), it was clearly of fundamental importance to him/her in a personal sense. Although the participant did not always label them as such, many of her/his activities were clearly strategic. The link is sometimes difficult to see (particularly in informal processes) but emanates from a *shared* recognition of the importance of the specific, the concrete, the particular, which becomes the foundation of a shared sense of alignment, focused around the core purpose and values of the organization (theme 5, section 4.16), which is then reflected within the strategic process (themes 6 to 8, sections 4.6, 4.9 and 4.10) and it ripples out into extended communities of interest.

How many words do we use to describe what it feels like to have our heart broken? Adele manages the task in just two short verses in her song, ‘Hello’ from the album, ‘25’ (Adele, 2015). That’s a good analogy to represent how the participants feel about the power inherent within the specificity of their connection to nature.

4.14.3 Pathway to personal connection

Many participants talked of significant events, mentors, supportive family backgrounds, childhood proximity to the natural world and other factors that they considered important in defining their relationship with the natural world. Conversely, some participants did *not* share similar factors in their background. One participant explicitly stated that his/her childhood had not been remarkable or so

different from his peers in this regard. (S)he concluded that (s)he couldn't answer the question, 'why me?':

"I had no mental, no obvious formative influence ... why did it become so important for me when it's clearly so unimportant at a conscious level for so many other people? ... Why me?" (interview 3).

The researcher asked this supplementary question to many of the subsequent participants and there were a very large variety of responses, which included depression, the feeling of not fitting in, a difficult childhood, personal life circumstances such as job losses and dead-end jobs, a burning sense of justice and equity, standing up for those less fortunate, personal family situations (including differently abled family members) and many other responses. A significant number of participants were unable to answer the question:

"No, I can't either" (interview 10).

"I wonder why do I do it? ... I don't know, my partner and I are still quite driven to do these things" (interview 36, researcher gender neutrality).

"To try and understand why me, it's probably because I'm odd!" (interview 30).

As a result, the participant data indicates that there are very many paths that have led participants to having a close connection with nature, with some relatively common experiences, notably the effect of influential people (mentors, section 4.14.4) and key events in their lives (section 4.14.5). What seems to be more important is that the connection to nature is a transformative process, once experienced, for whatever reason, participants 'get it' and become very passionate about it. Nature became very precious and valuable to them (section 4.14.6).

4.14.4 Mentors

Pivotal people in participants' lives who have 'sown the seed' of a love of nature.

A family background where key family members (or friends) valued the natural world, growing up in an area close to nature and the direct influence of key family members (parents, grandparents and so on) were all cited by participants as key influences:

"My friend just turned me on to nature. He was a real country boy; he just knew all the flowers. And I had my mind opened at a young age to the ... beauty and diversity of nature ... we show [our visitors] around, open their eyes to all these amazing little plants they hadn't even noticed before, just get a little bit closer to the ground, a whole new world opens up" (interview 4).

"My mother had a great love of animals but more with respect to caring for them ... so we ran a wild animal hospital ... from the age of about ten to 21 or something, I was very engaged in that ... [it] did make a big contribution to my connection with the natural environment and the animals ... and plants who live on it." (interview 7).

A close reading of the interview transcriptions revealed the rich language used by participants indicating the deep and transformative process of connection. In the first extract above the participant talks of having "my mind opened" and facilitating visitors to "open their eyes" so that "a whole new world opens

up". In the second extract the participant uses 'who' rather than 'which' to refer to the animals and the plants. This may appear to be a detail but it is evidence of a mindset that is based on a subject to subject participatory relationship with nature ('I/thou'), which is connected, rather than the more common subject to object relationship ('I/it'), which is dualistic and emphasises difference and often implies that nature is a resource to be utilised. The subjective 'who' replaces the objective 'which' and 'that'. It is important because it demonstrates the participants' deep connection with the natural world, which comes through in the language (and intonation) that they choose to use.

Some participants also talked of strong family values and beliefs being passed on:

"I think a lot of people in conservation, a lot of it will come down to upbringing and childhood, your kind of environment ... I spent a lot of time outdoors ... most of our holidays were in the UK spending time on nature reserves, or going to the beach, which meant I had the ability to experience nature and that time just to enjoy it and explore it and having positive influences within family as well, so being taught about nature ... I come from quite a religious family ... there was also a very strong message of having a responsibility to look after the world and that's stuck with me throughout my life [and] has shaped my values" (interview 32).

4.14.5 Key moments, memories and events

Pivotal times in participants' lives that have had a significant impact on them.

A significant number of participants mentioned that they had lived in, or visited regularly, rural or semi-rural areas close to nature as they were growing up, or were attracted to the green spaces within urban environments. These experiences, associated with being in a place closely connected with nature, had a profound impact on participants and they credited them (often in hindsight) with being very important in their personal journey into coming into close relationship with the natural world. These roots clearly run deep:

"[I was] brought up in rural Devon ... five miles from the sea, ten miles from moorland ... so, because we're in a rural environment, our schools had a connection with it, so you would do stuff that involved nature all the time ... when I moved ... you suddenly realise how important that environment had been to me and not realised it" (interview 21).

"I grew up in the countryside and I remember spending most of my childhood going out for walks, going out for long bike rides, just enjoying the countryside. I particularly remember the old stag beetles ... and, like most kids, fascinated with bugs ... so I've always been into nature and wildlife and stuff" (interview 30).

"I grew up in a fairly urban area in Glasgow, but we had some relatively ... wild areas around and I was able to make that connection in terms of ... woodland and suchlike, which probably sparked off my interest" (interview 19).

"[After my father changed jobs I was] exposed to farmland and ... I noticed the beauty of nature and how nature work, and interaction, and I'm so amazed about perfection of nature, so since then I started thinking, tried to follow nature's law and then, later ... that experience [became the] basis of my activity" (DW2, group interview 34, native Japanese speaker).

"My partner will say that I've come half-way round the world ... all the way over here just to live the same" (interview 23, reflecting on moving from rural Australia to in a small town in the UK, researcher gender neutrality).

An inter-generational element was significant for many of the participants. Some (including interviews 14,

17, 24, 29, 32) talked of developing a closeness to nature on family nature activities and/or vacations (when growing up or with their own children) or working with colleagues, volunteers or visitors with similar stories. One noted that visitors to their animal centre often returned to introduce a new generation:

“We remember coming here with the kids and now we’re bringing the grandkids and, so, it’s quite nice to see that generational step” (interview 2).

In other cases, family-based events and strong family values can have significant impact on the participants’ life stories. One participant talked about the influence of her/his granddad:

“He would go out and have a pheasant for the pot ... it would feed his family and that was very much his view, and he really put that into me, that even if you’re going to take an animal to feed your family you respect that animal and I remember [*that*]” (interview 29).

The participant also vividly remembered the day his/her grandad gave up his gun because:

‘They were just shooting anything that moved and one of them shot a barn owl and thought how wonderful it was, and that was the day he said, ‘no more!’ ‘We’re not doing it anymore’. ‘If that’s what shooting’s become, I don’t want to be part of it’ ” (interview 29).

Some participants found solace in nature when facing difficult aspects of their childhood (some too personal to be recorded here). One participant recalled taking her/his pony across the Brecon Beacons (interview 36, section 4.12.2) and another commented:

“We used to run about across the fields at the back of where the houses were, but I used to go and stand at the highest point ... where I could sort of see the view around me to remind myself how small I was. And that was incredibly helpful as a child” (interview 1).

The participant above recalled having very dramatic realisations about the immense creative power of nature and the “generosity in the natural environment” (interview 1). These incidents, observing the sheer profusion of raspberries on one occasion and the “patience of nature” in relation to the emergence of orchids on a small strip of land on another, were a revelation to him/her, with a life changing, lasting impact. To an outsider this may seem a little ordinary, prosaic perhaps, but the participant found the experiences “profoundly interesting” and “it was just raspberries, massive!” Here again, is the sense of having our eyes opened, of suddenly seeing something, a revelation, that we simply weren’t able to see before. It was often seen by participants as far more significant than it may at first appear because “once it is noticed once ... then you start to spot it everywhere” (interview 1).

This search for meaning, and finding it within the natural environment, was a common thread during the participant interviews. Participants often expressed this search for meaning by relating specific concrete events in their lives, where a connection with nature, at a very specific level, became deeply meaningful to them, and sometimes even a life changing experience. The following rather long extract demonstrates this process in a particularly powerful and beautiful way:

“It means an immense amount, you know ... I can give you a very concrete example. I’ve just come back from holiday and I was lucky enough to meet *Primula Scotica*, which is a very small, very beautiful little flower that lives on a few patches of short turf in Orkney and Caithness and nowhere else in the world. And, the combination of being in proximity to that organism, that living thing and the knowledge of how special it is, how vulnerable it is, to me is extremely moving. I

don't know whether I should say this, but it reduces me to tears when I meet something in those circumstances. And they're quite happy tears but there is ... [*pauses for a while*] ...

"... deeply moving, you know, there's an emotional connection between the place, what lives there and the... a little bit of understanding of how special that is, and therefore how privileged I am to be able to, you know" ... [*another pause*] ...

"... for me to know that I have, at some point in my life, met some of these, sort of, fellow travellers on the planet, [*that*] is very, very important to me and has been for a very long time" (interview 3).

Looking at the participant data as a whole there is an intensity in the participants' descriptions of their connection with the natural world and this clearly fuels their determination and drive to make a difference in their endeavours. It simply matters *that* much to them. Several participants had founded environmental concerns in response to such profound realisations when in nature (interviews 11, 12).

4.14.6 Nature is precious and valuable

Participants were asked to describe themselves in three words at the beginning of the individual interviews. 17 out of the 81 words chosen were descriptions of their work or profession ('conservationist', 'environmentalist', 'naturalist', 'wildlife campaigner' etc.) or linked to working outside in the natural world ('active', 'practical', 'outdoorsy'). This compares with 29 adjectives describing how passionate, highly motivated and committed the participants were in relation to their work (section 4.12.3).

Both types of response are linked to a connection with the natural world but the latter expresses the level of intensity that the connection engenders within them. This is closely related to participants' view that nature is *not* simply a resource or a commodity. It is precious and valuable to them and it was often closely linked to their sense of identity, how they saw themselves. The participants' relationship with nature was expressed in both extrinsic and intrinsic terms (sections 4.13.8 to 4.13.10), which includes the beauty of the natural world, nature as a source of inspiration, its ability to provide a sense of balance and harmony in life and its role as key to life itself:

"It's ... understanding the intrinsic value, if you like, the sheer beauty and diversity of things, just the vast number of different beetles ... they've got an intrinsic beauty and an intrinsic value" (interview 30).

Sometimes, participants failed to find a descriptive word or explanation for their connection with nature that satisfied them and they described their relationship more in terms of *why* this aspect of nature was so important. Sometimes words failed to adequately express their full feelings. One participant (interview 17) commented that descriptive words such as "iconic" and "special" were "cheesy" but struggled to find satisfactory alternatives that expressed the full impact that nature had upon them. Instead, the participant concluded simply that:

"Nature *is* special ... very precious and ... [*the focus of the charity is*] internationally a very rare habitat, they're actually more rare than rainforest, and the creatures that depend on them are obviously very vulnerable if we, as humans, that have the greatest impact on them, don't take good care of them" (interview 17).

Many participants hold a holistic, ecological perspective and acknowledged the importance of being part of something bigger than themselves. Nature is precious to them, both conceptually and at a specific, personal level. Participants often expressed their connection with nature in terms of its impact on their sense of identity and how this has impacted on their personal journey to understanding more fully who they are:

“Valuing the natural world and the value of people’s different connections with the natural world is central to my life ... there’s a whole network of things going on there, which are so fundamental to who I am and what I am, I’ve been doing for as long as I can remember” (interview 3).

“I’ve always loved animals and been able to relate to them just naturally ... it’s not just practically about ... rescue and advocacy ... but the broader issues about how we relate to the natural world is actually something that’s much closer to my heart than you would have thought” (interview 5).

Again, the language chosen by participants above to express the strength of their connection with nature is important. They often used words and expressions such as ‘love’ and ‘closer to my heart’ to express the intensity of their feelings:

“I’ve always from a kid loved nature” (interview 4).

“My belief in conservation and animal rights ... are very strong, and so I feel a responsibility to look after this place ... because I love it ... I love every inch of it” (DW6, group interview 34).

“It’s something that I’ve always *had* ever since I was a kid ... I’ve always had that connection with nature” (interview 2).

“I’m compelled to action because of that connection [*with nature*]” (interview 10).

“I feel a compulsion to improve things” (BW7, group interview 33).

The process of connection with nature is profoundly important to participants and it changes them. It can be transformational as Mike Clarke, former CEO of the RSPB, noted when he talked about falling in love with the natural world (section 4.11.5). He followed this up by stating that “to me RSPB members are part of my family” before linking that to collective action by saying that “together a million voices have said, ‘enough is enough’ ... together we can make a difference” (Clarke, 2017). This is the relational link between the strength of the specific individual connection to nature and the ability to make a difference collectively within purpose driven organizations (theme 5, section 4.16).

4.14.7 Experiential process of connection

Participants expressed the experiential process of connecting with the natural world in their own personal ways but three key themes emerged. Firstly, participants discussed how they ‘get’ the transformational power of a connection with the natural world and explained why it is so valuable and precious to them (section 4.14.8); a ‘matter of life and death’ in the words of some (interviews 3, 16, 25). Secondly, they described how it takes them (or those that they are working with) to a special place within themselves (peaceful, happy, connected with who they are in some way) (section 4.14.9). And thirdly, they talked about how it happens at a specific level and yet links them to a universal understanding that there is something bigger than they are (section 4.14.10).

4.14.8 'Getting' the transformative power of nature

Participants 'get it': 'the thing', the 'jolt', the 'hook' that 'ignites the spark', that 'triggered something in me'.

Participants struggled at times to find words that adequately conveyed the power of their experience in connecting to nature or the transformational capacity of nature they observed in others (theme 4, section 4.15). This is not a simple or superficial process. Participants also recognised that their experience may not come so easily to others:

"It takes time. Not everyone is like I was. I was quite an easy sell ... for nature, it hooked me ... but a lot of children may need a little more time" (interview 22).

Participants tended to use words such as 'get it' (interviews 4, 7, 9, 17, 23, 24, 32, 35), 'the hook' (interviews 21, 22, 24), 'the thing' (interviews 2, 22), the 'jolt' or 'the spark' (interviews 4, 14, 19 and 23) and the 'trigger' (interviews 11, 24) to indicate a transformation of some sort. This is reinforced by expressions such as having our 'eyes opened', seeing something that was not seen before or equivalent ways of expressing a lasting change in perception, mindset or perspective (section 4.14.5):

"Volunteers who come to us when they've retired, they've had their eyes opened to it" (interview 17).

There was sometimes an evangelical element to participant comments, a need to ensure that others also 'get it' because:

"It will be up to the next generation. We have to keep that spark alive for them to take ... to carry the torch" (interview 4).

"It's quite a difficult journey because you're 'I don't know', so, as soon as you find your thing, your hook, it's great because you can be really, you can express your enthusiasm for it ... It's a similar journey for me ... that was my hook, that was my thing that I then found and was like, 'yes, I got it! Now I'm going to follow this path' ... So, I guess if that's there for anybody else ... I would love to help them find that connection" (interview 22).

The terminology above is, however, only part of the story. Often participants struggled with how to express what they felt. Sometimes, it was easier to describe the actual story of a process of transformation in others that occurred as a result of a connection with nature than to put words to that process in themselves. These stories were sometimes very powerful and evocative in their own right (theme 4, section 4.15).

4.14.9 Special place within

A peaceful, happy, calm, neutral place where the participants, and those that they work with, feel that they are not judged and where they can be (or move more fully towards) who they really are.

Participants who were working with nature to help others in areas such as forest schools and nature-based curriculum enhancement, wellbeing programmes, community support (for example, helping people to build skills, access education and so on) talked extensively of the intense reward that they derived

from this work. Again, it was often easier for the participants to convey this through individual stories and examples, rather than through descriptive words (theme 4, section 4.15).

The italicised words at the beginning of this sub-section are those used by participants, who based them on both their own experience and feedback from third parties (referrers, parents, carers and so on) and their clients. They primarily focus on feelings of peace, calmness and happiness associated with nature, the non-judgmental state of being in nature and the freedom of those being supported to discover themselves.

4.14.10 From the specific to the universal

Participants talked about how they accessed a universal sense of meaning through the particular; the specific and concrete day-to-day experiences. Organizations in the environmental sector often seek to convey meaning through the use of specific stories and personal narratives to bring conservation and species protection to a very practical, experiential level in order to engage the public. Specificity matters a great deal in engaging people, turning concepts and events that are interesting to them into something personal and specific, something which people can care about:

“*[It’s]* not just about direct action. It is inspiring people ... you can get people to care about a species that they never would have cared about if they can see normal people, volunteers, taking time out from their own lives to go save something, a creature they’ve never even heard of, in a place they know nothing about ... it doesn’t take governments or politicians or huge groups to influence change. It can be individuals, just a few people can make a huge difference and some of the biggest changes in the conservation movement have been started, or are entirely down to, one person ... entire species have previously been saved by one person making a stand” (interview 31).

For this reason, participants that operate visitor centres attempt to create a personal link between their cause and members of the visiting public, often by focusing on a specific species or project and linking this into the bigger picture (habitats, ecosystems, climate change etc.), for example, webcams on nesting sites, personal stories from the field and, in the case of one participant, flight displays, which included a species of bird that many people might dislike or even fear. The visiting public see both the specific activity and the broader connection:

“*[It is]* in our flying demonstrations, which is the principle way in which you engage with the public ... working to conserve birds of prey *[is]* ... not just about birds, it’s about the whole ecosystem” (interview 28).

The researcher stayed for one of the displays and observed the response of the public. Seeing these magnificent birds in action had a dramatic effect on those watching, perhaps establishing a personal connection that had not been there before. The participant organization had plenty of positive visitor feedback on Trip Advisor to attest to that potential connection being made. The specific and the whole work together. The specificity of the connection process to nature is shared at an experiential level and feeds into a shared sense of collective purpose, mission, vision and values that underpin the ability to make a difference. This then drives the strategic process so that key organizational objectives can be met (theme 5, section 4.16):

“We have a lot of supporters ... engaging with ... this idea of restoring this mythic forest ... there’s a lovely narrative that really kind of pulls on ... [*the*] emotional ... heartstrings. But people are also engaging practically so if people come out with us and ... they get involved in forest restoration and they are planting, or they’re putting up fences or they are doing a contribution to the forest ... that seems to be an incredibly powerful experience for the people that come on those things. For some reason, ... it seems to get to them, get to their ... body, soul, mind thing and, again, I’m not just planting this tree or I’m not doing this one conservation task, I’m doing this and it’s helping towards this vision, this idea of a restored forest. So their one act is this, that connection, one act is helping to the bigger whole and I think that’s quite powerful” (interview 35).

4.14.11 Matter of life and death

Whilst participants differed on what aspects of this precious and valuable relationship with nature that they chose to emphasise there was broad agreement on how important it was to them. One participant spoke slowly and deliberately, grounding his words in the specific, when he said:

“For some people, this is bordering on life and death importance ... there are people for whom ... finding that safe space is essential ... all those kind of things ... get turned into clichés about wellbeing but ... it’s very nitty-gritty. It’s absolutely specific. It’s about the moment when you are ... looking at, touching, smelling sensing ... being in a place, being in contact with something physical or biological ... that’s not you but is” (interview 3).

The specific and personal connection with nature was of the utmost importance to participants. The interviews tended to share a common process. At the beginning most participants were guarded, a little reticent to be too forthright with their personal beliefs. As the interviews progressed this reticence slipped and the final parts of the interview were often the most revealing, particularly the final question, ‘Is there anything that we haven’t talked about that you consider important?’ it was here, and sometimes after the interview, after the recording device had been turned off, that participants opened up more fully and discussed what was most important to them:

“It’s effectively morality that comes down to life or death” (interview 16).

“If you lose a species, that’s gone from the gene pool, you’ll never, ever recover that, never, ever” (interview 36).

“It is entirely possible that volunteers could be killed or die on a campaign” (interview 31).

4.14.12 Where are the exceptions, the contrary views?

Initially, the researcher expected to find a wider spread of opinion and a greater diversity of experiences. As a result, the coding and transcripts were looked at again with a view to identifying exceptions to the participant views and themes summarised above. The rich data provides a diversity of experiences, across a range of ages, types of environmental organization (size, focus, geographic location etc.), organizational roles of the participants, gender and so on. There are also some differences of opinion. However, the key insights and themes do seem to reflect a remarkably broad consensus between the participants, particularly around meaning and this was particularly evident from the discussions at the four workshop events. One reason for this might be that working for purpose driven environmental organizations with strong values-based cultures may be a self-selective process; a certain type of person is attracted to working for them, which produces a greater uniformity between the participants than is

immediately apparent on the surface.

4.14.13 Key linkages

The intensity of the participants' shared experiential process of connection with the natural world (a shared understanding of underlying meaning) underpins their ability to make a difference in the world collectively within purpose driven organizations (theme 5, section 4.16). It is the relational link between the strength of the *specific* individual experiences of connection and a *shared experience* of the connection process itself, which underpins the *collective* endeavour of participant organizations. This has a direct impact on the strategic processes within participant organizations and their ability to achieve their purpose and objectives (themes 6 to 9, sections 4.6, 4.7, 4.9 and 4.10). For some participants this was expressed as much in terms of people as nature through a strong ethical sense of fairness, equity, justice, compassion and empathy (theme 4, section 4.15).

4.15 Theme 4: We are a part of nature not apart from it

What we do?' and 'Why do we do it?': We stand up for nature and people because we recognise that we are a part of nature not apart from it.

What we do? and why do we do it? These questions are linked to the purpose-based nature of our work. We stand up for nature *and* people. We work for nature to survive and thrive through conservation, restoration, protection and advocacy and we recognise its potential to enable people to transform their lives. We do our work as an expression of our deep connection with the natural world, our relationship with both nature and people, in order to make a difference. We act because nature is in crisis and it has both inherent value in and of itself and because it is our life support system, offering us many benefits in addition to life itself.

4.15.1 The narrative

The work of participants is purpose-based environmental work, which covers a broad range of activities (flora, fauna, landscape, animal welfare, advocacy and so on) and is closely connected to their deep connection with the natural world (theme 2, section 4.13) and their personal pathway into this work (theme 3, section 4.14) including the diverse but shared experience of the process of connection itself.

One of the central themes discussed by participants about their work is that it covers both nature *and* people. Indeed, for some participants the transformative power of nature was equally, and sometimes more front of mind than the practical, nature-based work of supporting, conserving, restoring and protecting the natural world itself. It was expressed in terms of a strong ethical sense of fairness, equity, justice, compassion and empathy. For these participants linking nature and people was key. Indeed, one participant stated that the priority for the organization was the "development and enhancement of vision and mission from nature to nature and people" (interview 14) and that (s)he "wouldn't be sitting doing this job" if it wasn't for the social, economic and community aspects of the work, providing access to the

benefits of the natural world for *all* those across the economic and social spectrum:

“There’s an implicit assumption that actually this isn’t just for people like us. It’s for everyone, it should be independent of one’s economic or social status ... including ... people who haven’t even got to the basic level ... there’s a reasonable proportion, what is it now, one in ten children in the conurbations, is living in ... [*what is*] defined as economically in poverty. So, none of this pontificating about this relationship [*with nature*] is really all that important if it doesn’t address their needs” (interview 14).

Whether participants were in roles where they supported people (working with the potential of nature to help people to transform their lives) or working directly with nature itself (conservation, restoration, protection, campaigning, advocacy etc.) a strong ecological perspective and sense of interconnectivity (nature and people being part of a greater whole), pervaded the interviews. Many participants indicated that the sector has changed significantly over the past ten years with the increased realisation that people are central to the dynamic of achieving their purpose, both in recognising and facilitating the capacity of natural processes to help, transform and heal people (deepening the organizational purpose) and broadening the community of people who experience the power of a connection with nature. This is done through a process of broad engagement; widening their support base and increasing their resources and capacity to influence change through community collaboration, partnerships, shared project work and so on.

Participants expressed a strong sense of urgency in their work. They believe that there is a need to act now, to make a practical difference now, because, *without exception*, they see nature in an unprecedented state of crisis and most perceive that time is running out fast (and many admitted, very often *after* the interviews had ended, that they felt it was already too late). Paradoxically, whilst participants expressed frustration, exasperation, sadness and showed signs of grief they also exhibited a steely determination, against all odds, to push ahead, a paradoxical sense of optimism that it is never too late and, most of all, that it is somehow worth it. There was a palpable passion, commitment and determination to pursue the work (theme 1, section 4.12), no matter what emotional or mental turmoil resulted from the current challenges that they face and what levels of self-doubt the participants may have privately felt, and which they occasionally referred to, almost always outside the formal interviewing process.

When the participants discussed the work that they do and why they do it they expanded on their connection with nature (themes 2 and 3, sections 4.13 and 4.14) in terms of both the extrinsic value of nature (the benefits to humankind) and the intrinsic value (its value in, by and of itself, including its capacity to generate awe and wonder and to link us to something bigger than ourselves) (sections 4.15.10 to 4.15.13). Similarly, the work that participants do is also marked by a focus on action, actually doing things. This is critical to *how* environmental organizations do what they do, how they make a difference (theme 5, section 4.16).

This theme is strongly related to themes 1 to 3 and 5 (sections 4.12 to 4.14 and 4.16), which *together* demonstrate the relational foundation of participant organizations (research question 3, section 4.11). They are strongly purpose driven (theme 6, section 4.6) and this strong sense of purpose and associated

deeply held values, drive the strategic processes of the participant organizations. Themes 1 to 5 share a common literature base (section 4.11), although each theme retains a degree of specificity.

The nature writing literature is strongly aligned with the participants' views on the current environmental crisis and echoes their comments on the sense of personal loss resulting from the disconnection of mainstream society from nature and the significant erosion of the web of life (McCarthy, 2009; Anthony, 2010; Macfarlane, 2013, 2015, 2019a, 2019b; Lewis-Stempel, 2014; Macdonald, 2014; Lister-Kaye, 2015). Both are marked by intense feelings and a sense of the existential nature of the environmental crisis (McCarthy, 2009), and include a personal sense of loss and grief, especially of those working in the field (Macfarlane, 2019a, 2019b). There is also a recognition of both extrinsic and intrinsic value in the natural world (Mitchell, 2002; McCarthy, 2009; Nicolson, 2013; Macfarlane, 2019a; Whyte, 2019).

In short, participants share a common set of values and beliefs with those in the environmental sector and seek to extend their awareness of the extent and global nature of the environmental crisis into the wider world. The high-profile actions by young people, including the emergence of new youth leaders such as Greta Thunberg, demonstrate the increased awareness and importance placed on the value of nature as humanity's life support system by an increasing number of people outside the sector. In 2019, Greta Thunberg was awarded *Person of the Year* by *Time Magazine*. The simplicity of her message is important and speaks for itself:

“ ‘We can't just continue living as if there was no tomorrow, because there is a tomorrow ... That is all we are saying'. It's a simple truth, delivered by a teenage girl in a fateful moment” (Alter, Haynes and Worland, *Time Magazine*, 2019).

4.15.2 What do participants do?

When participants discussed what they did and why they did it they touched on a number of key themes. Participant organizations not only support the natural world (section 4.15.3) but they also work to transform, heal and improve the lives of people through nature (section 4.15.4). They do this because they believe both are of the utmost importance. Participants talked extensively of the escalating environmental crisis (section 4.15.5 to 4.15.6), including the continued widespread disconnection with nature (section 4.15.7), the current vulnerability and fragility of the environment (section 4.15.8) and the need to ensure a sustainable relationship in the future (section 4.15.9). Participants regard both the intrinsic value of nature (sections 4.15.10 to 5.15.12) and the extrinsic value of nature (section 4.15.13) as vital to a sustainable and healthy future. As a result, participant organizations are strongly purpose driven with deeply held underlying values, which many participants found deeply satisfying:

“On a personal level, I have learned about myself that I like to work in a role that has purpose, and for me that purpose comes from working for a cause, and so the cause that I represent through my work, is something I personally believe in, which is about the importance of wildness and wild places, and the importance of connecting people and nature in a healthy way” (PW2, group interview 37).

4.15.3 Standing up for nature

When participants spoke about what they did they often expressed their work in terms of service to some

aspect of the natural world, working on behalf of nature, standing up for nature (a term used by the RSPB, National Trust and other environmental organizations in their work and communications). This includes work on the sustainability, protection and enhancement of the natural world, including conservation, restoration, protection, engagement, advocacy and policy, recreation and access, education or other elements. Participants sometimes disagreed with common terminology used in the sector or by the wider public, to describe their activities or purpose, expressing it in broader, more connected and expansive terms:

“I worry about the terminology actually, I'm not happy with ‘defending’ and I'm not happy with ‘protecting.’ ... I try not to use them normally because I don't think they're appropriate ... I think you've got to give nature the opportunity to thrive, uninterrupted, as far as you can ... it's not a case of surviving, they've got to be able to thrive well ... because things have to change, so they're not appropriate words” (interview 36).

4.15.4 Helping people and transforming lives

Helping people by working with them in a natural environment to change their lives for the better was a key theme for many participants, sometimes as, or even more important, than supporting the natural world directly. This was often expressed as a sense of duty, reflecting the values-driven culture of the participant organizations, both for nature and people. This sense of duty was underpinned by a strong sense of justice, fairness and equity (looking after those who are disenfranchised physically, socially or economically) and an underlying compassion and empathy (theme 1, section 4.12).

This links the remit of participant organizations to broader societal issues, working with clients who were disadvantaged, children at risk of exclusion from school or from economically deprived, often urban, areas without the advantage of growing up close to nature, those who are differently abled and those suffering with medical, economic or social issues and so on.

Participants in client-facing roles spoke very passionately about their work and often evidenced its value by telling stories of the positive effect that nature has had on specific clients. Although many admitted they were relatively poorly remunerated, there was a strong sense of the satisfaction they gained from being in service to others and seeing the positive changes resulting from their work; a sense of receiving from giving. Often participants expressed a moral or ethical imperative in their work, a sense of doing the work because it was the right thing to do:

“I feel I have a moral imperative to make a difference” (interview 23).

These stories were often deeply moving, at times very personal and were often told in confidence. Some participants worked with excluded and disadvantaged individuals, often children, for whom the nature-based work had proved life changing (for example, a transgender child making a very difficult transition during his/her adolescent years). Participants spoke quietly and passionately about the transformational potential of working with people in nature, including working with disadvantaged people, young people and children, funding educational and practical opportunities and running nature and community engagement initiatives. As one participant (interview 25) put it, this is “my way of life” (for example, interviews 2, 14, 19, 21, 22, 24, 25).

Participants also talked extensively of collaborative working through formal partnerships, joint project work and more informal working relationships, which are becoming increasingly common (theme 7, section 4.9). Nature engagement initiatives, such as the John Muir Award, span organizational boundaries and are delivered by a wide range of organizations and engage large numbers of people (some 300,000 completions across the UK by 2019). Such programmes not only engage people with nature *and* community but they are inclusive in terms of participation and the areas that they serve. They are an intensely practical way to help transform the lives of those who participate.

A central concern for participants in their working lives was the ability to make a difference as a result of their work (theme 5, section 4.16), whether working directly to support the natural world or helping to change lives for the better through connection to the natural world. This, they felt, was the best reward for what they do:

“The question is, well, how is it going to make a difference... unless we can influence the way society is structured and the way it makes decisions and the way it differentiates between good and bad, good or less good... unless we can influence that, actually, you’re not going to be able to make the difference. This is not a question about people and nature, this is ... actually more a question about people and other people” (interview 14).

4.15.5 Why do participants do it?

Participants do what they do because it’s simply *that* important to them (themes 1 to 3, sections 4.12 to 4.14). They talked extensively about the current environmental crisis and the need for greater connection with the natural world within mainstream society to prevent the crisis from accelerating (the negative side) but they also talked passionately about what the natural world provides for us, both in terms of the intrinsic (inherent) value of supporting nature for what it is (in, by and of itself) and the extrinsic benefits, the planet’s life support system, expressed in many diverse ways (the positive side).

4.15.6 Natural world in crisis

The escalating environmental crisis has a very strong impact on participants, almost compelling them to do what they do. One participant (interview 4) referred to people asking the question ‘what have we done?’ when they realise the extent of the crisis:

“I think we’re in a nadir at the moment, so low we must go up ... *[although]* the next generation of people are going to have to deal with much worse things than we are dealing with” (interview 4).

As the interviews took 18 months to complete the researcher was aware that the sense of urgency, the recognition of the need to act quickly, increased dramatically within the participant group over that time. A significant minority of participants felt that humankind was on the wire, or beyond it, that it was almost or already too late:

“So, in a sense, unfortunately in conservation ... it’s like being an artist and watching a gallery burn down every day of every week of every year, you know, the Mona Lisa’s just gone, and yet, you have to be buoyant and upbeat *[laughter]* and try and enthuse people to get involved in art

[*more laughter*], isn't it [*laughs*] and so, it's what's in your soul as an individual that probably drives us, and those people like us, how do we get politicians in particular, but the wider world [*also*] to unlock that little bit of their soul, which is there, they just don't realize, some of them, that it is there" (BW6, group interview 33).

It is interesting to note the use of the word, "soul" above and the laughter that greeted the comment despite the serious nature of it (theme 1, section 4.12.3). The laughter partially indicates the resonance of the experience between participants but might best be described as gallows humour. The reference to soul is another indication of embodied perception, part of the deeper knowing that participants exhibited throughout the individual and group interviews.

4.15.7 Widespread disconnection from nature

The disconnection of mainstream society from the environmental crisis (climate change, loss of biodiversity, ecological collapse across the natural world) was one of the dominant themes across all the interviews. Participants often began the interview process with balanced and nuanced statements about the negative effects of this disconnection but became much more forceful as the interview went on. Many participants expressed far stronger views after the formal recorded interview was completed, occasionally in terms of societal collapse. One participant, looking around at the local woodland, observed:

"All this will be gone within four days" (interview 9).

The following participant extracts give a flavour of the seriousness, the intensity of emotion and the sense of urgency that participants feel about the subject:

"As a society, at the moment, we are, many of us ... guilty of wilful blindness. It's easy not to bother yourself with any of this stuff and if you start talking about climate change or rates of human reproduction ... I mean, these [*are*] really big issues ... but I think as a species, as a society, we have to face up to them and we have to start having these conversations, without it becoming a melee, a rammy [*Scottish, meaning brawl*], we have to start having mature conversations about where we as a society, and a species, are heading. Because, at the moment, the model, is unsustainable, totally unsustainable. And, I think there are some tremendously intelligent people in this world, where are they? ... why aren't we having these conversations ... at a higher level and in a mature environment? I don't get it. I don't get it" (interview 10).

Many other participants echoed this feeling that people don't 'get it':

"We are, as a society becoming more divorced from nature ... I think a lot of people today ... say these words, but they don't really, really get it" (interview 9).

"We are less connected with the world, we don't understand it" (interview 16).

"I'm always trying to open people's eyes to the wildlife around them ... they think in Britain we have no interesting wildlife ... and then when you show them something ... they go, 'oh, wow, that's amazing!' because they just don't know it's there" (interview 29).

Some participants discussed the reasons for this disconnection. They felt that, unlike the holistic view of ecologists and other scientists, many people feel overwhelmed by the sheer size of the issues. Moreover, they may not *want* to see themselves as one with nature but separate:

"It's just something you think about every day and you're working on every day and then you'll talk to other people and it's just something that doesn't even cross their minds. I mean, it's such a

big issue and it's so important but it's almost too big that people can't get their heads around it, which I understand, but at the same time it just gets [worse]:

[laughs and continues]

"It's an issue that needs to be addressed now and it's just taking so long to get any action ... I also think that ... so much time is just spent indoors now and just isolated from the outside world, and people ... do feel completely disconnected ... [and] don't think of themselves as being part of an ecosystem, they see ... wildlife and everything being 'out there' and then not having a direct tie to it, their personal actions not having a direct consequence for it, and, similarly, changes in the ecosystems and the environment around them not having a direct impact on themselves" (participant 32).

This self-referential perspective was neatly summarized by one participant as:

"People don't see things as they *are*, they see things as *they are*" (interview 4, quote generally attributed to the writer, Anaïs Nin).

Another participant put disconnection into an historic context, referencing Aldo Leopold (American author, philosopher, scientist, ecologist, forester, conservationist, and environmentalist, 1887-1948), who was often referenced by the participants:

"It's simply because we are really seriously screwing up the planet in so many different ways... the overfishing of the oceans, the felling of the forests, the pollution of the atmosphere, you name it. And it's a boring old mantra that people have been trotting out since Aldo Leopold but it gets worse not better" (interview 12).

The data around this topic is particularly deep and rich as the participants extensively explored and struggled with these issues in their own terms; why people don't apparently care, the serious economic, social and funding issues that are emerging, the consequences of a rapacious addictive consumerist society and so on (for example, interviews 16, 31, 33). Perhaps the saddest observation was:

"It's only when you haven't got something that sometimes you realise ... how valuable it is" (interview 21).

4.15.8 Vulnerability of the natural world

Participants talked extensively about the need to recognise the complex nature of the natural world and its vulnerability and fragility, including the level of interconnectivity and interdependence of ecosystems, the essential mutuality of nature, the potential for unintended consequences arising from human actions, natural trigger points and feedback loops (involving climate change, loss of biodiversity and so on), much of which might be summarized in the statement that we should tread lightly with care and respect; we know much less about the natural world than we think we do.

Participants indicated that the natural world is in a rapidly accelerating state of decline, that the situation is far worse than is generally acknowledged, for example, the level of degradation in the natural environment (for example, interviews 9, 19, 35) and they often linked this crisis to the importance of their own roles as stewards for the natural world, sometimes stressing the moral and ethical implications of humankind's continued disconnection with the natural world and its destructive behaviour and practices, which are "not right" (for example, interview 18). Many stressed that action must be taken *now* (for

example, interviews 9, 19, 31, 35).

Many participants particularly stressed the vulnerability and fragility of nature; one participant gave a simple lesson in economics and another two powerful, practical examples of the process of, and significance of, degradation at work:

“The further you drive your species towards extinction, the more it is worth to continue to extinguish them” (interview 31).

“A simple example, a piece of flower-rich grassland, you can drive a tractor with a fertilizer spread around the field in half an hour and you could take decades to undo that half an hour’s work” (interview 3).

“The highest priority is saving the ocean to save ourselves. None of us would be here with a dead ocean” (interview 31).

Ironically, some participants expressed both the vulnerability of the natural world to mankind’s continued assault and also nature’s inherent resilience. Many participants were actively involved in areas that work with the power of nature to regenerate (landscape, ecosystem and habitat renewal, rewilding and so on). Rewilding (nature restoration or regeneration) works with the principle that nature works best, with some provisos, when humankind interferes least (interviews 10, 11, 35) and this principle certainly resonated strongly with many of the participants.

4.15.9 Moving to a sustainable future

Participants talked about sustainability in terms of our ability to live within our means in harmony with the natural world rather than being in opposition to it. This includes the addictive process of human consumerism and greed, including the over-extraction of the Earth’s natural resources and the destruction of its life-giving properties to the detriment of humanity and, ultimately, humanity’s ability to survive. A common response from participants was to lament the legacy that we are leaving our children and grandchildren:

“We are being incredibly selfish. We have generations to follow us” (interview 9).

This was echoed by many other participants including interviews 7, 11, 28, 30. The rapacious destructiveness of mankind was sometimes referred to as a disease, most notably by one participant who used the metaphor of cancer to describe the effect of human beings on the planet:

“Our modern consumer culture is, I think rightly, compared to cancer because cancer is the only place in nature where unlimited, uncontrolled endless growth occurs, which is what our economy is based on... and we know what cancer does, it ends up consuming its host” (interview 11).

The potentially devastating consequences of an inability to relate to nature in a sustainable way were also widely noted by participants:

“How many years have we got before we go belly up? ... and certainly, as a geologist, I’m very much aware of the fact that extinction is the rule of the game ... 99% of all known species ... ever known are extinct ... extinction happens” (interview 13).

“The chips have been stacked against nature conservation ... You can see it in previous civilizations, I'm sure that they understood the same things that we do but they chose to continue to run down their resources ... we've done it by technological development and that will run out as well ... at some point, [*they will*] run out of steam. Don't know where, don't know when, don't know what the consequences will be, but we need Plan B” (interview 14).

4.15.10 Awe and wonder: Intrinsic value of nature

This section complements the analysis of the intrinsic value of nature (theme 2, section 4.13.10). The participants talked extensively about the awe and wonder that the natural world evokes, its inherent beauty and the profound sense of meaning that it brings to them, often as something that is bigger than us (section 4.15.11), linking this directly to why they choose to do what they do. They referred to nature as a great source of healing and inspiration (section 4.15.12), often at a deep philosophical or spiritual level (beyond being simply a contribution to a sense of wellbeing and offering specific benefits to humanity) and they talked about the satisfaction, contentment, happiness and sometimes joy that working with the natural world has brought:

“[*When you*] see people at their lowest possible point but then when you see that same person [*later*] ... not everybody sees that, but I still think that working within this organization there's definitely that sense of, what we do ... it brings happiness and joy to people” (interview 25).

Participants see the natural world in a wide variety of ways but their responses contained many common elements; nature as a source of beauty, diversity, harmony and balance, a place providing hope and inspiration, healing for both mind and body and a place to soothe the heart and the soul. In addition, many talked about the quality of the natural world to take them (and/or their clients) to a place that is bigger than themselves; a peaceful, calm place, a happy place, a special place. Whilst participants often talked of nature's inherent (intrinsic) value and beauty some beneficial aspects that arise out of this relationship (notably, increased health and wellbeing) also have an extrinsic value dimension.

Participants were generally hostile towards any attempt to monetise this value. They felt that the concept of expressing nature in purely monetary values was deeply flawed (for example, interview 35, section 4.13.10). In short, they believe that we cannot put a price on the intrinsic value of nature and attempts to do so with the extrinsic benefits of nature (ecosystem services and nature capital) are understandable, sometimes necessary, but ultimately flawed.

4.15.11 Something bigger than us

Participants often alluded to the greater whole and the idea that through nature they are able to touch something bigger than them, potentially both outside and within themselves. Only two participants (interviews 4, 23) used the term 'biophilia' (the innate and genetically predetermined affinity of humans to nature) and many struggled to express what this meant in words and chose different ways to communicate it:

“To understand that you're part of it [*and*] not separate from it ... that to have dominion over it is not necessarily the best thing for humankind ... I also have a thing, but it's not a work thing, it's a personal thing about [*how*] we live in a 2D world now, whereas the natural world of being outside

... I love doing things with my hands and ... making furniture and doing woodwork, and sort of 3D things and I just ... because of my job, I don't do it much and I think a lot of people are in that position and the natural world is a " [laughs] (interview 7)

Even though the participant never quite finished the sentence, it is a powerful statement of what the natural world means to them using an effective metaphor, something bigger than us (3D rather than 2D), a different dimension. Yet, paradoxically, participants often stated that the connection with the natural world is also very practical and grounded, "my little thing in '30 Days Wild' each day is what's keeping me sane and keeping me grounded" (interview 7, discussing the month-long nature challenge, doing something wild for 30 days, organised by the Wildlife Trusts). This can be transformative; for children taking part in Forest Schools, undertaken in a natural environment, it changes them and has a lasting effect:

"That connectivity, it *does* something ... there is something about it and what happens with those children and with those young people we're working with is that there is a lengthened impact. So, it's not just that when they come back to school they're calmer, it's that they're calmer for the rest of the week. And, so schools are saying to us, parents have got quotes that ... this, my child, this is genuinely impacting my child in a way that I haven't seen something else do" (interview 23).

Almost all of the participants talked directly or indirectly about their values and that their work was an essential part of who they were. Many linked these values with a belief in the inherent value in nature. It was important to them in and of itself. It provided a sense of meaning, a connection to the whole, "something profoundly important" (interview 1). Participants often linked this intrinsic value of nature to their worldviews, life philosophy, deeply held values (including fairness, equity, justice, compassion and empathy) and their commitment to their professional (often scientific) training and values, which were often integrated into their sense of identity (interview 16).

A limited number of participants *explicitly* linked this to their personal faith or spiritual perspective (interviews 5, 6, 11, 21, 32; section, 4.14.4), which often included a strong sense of responsibility for the stewardship of the earth and all its life forms:

"My faith suggests to me that I'm a steward of the world I live in ..., we don't have discussions here about climate change because it's a tenet of faith, so we all accept that it is happening. My argument is that it shouldn't really matter if it is or is not happening. We should be stewards of our resources and our environment, and the part we play in it. So, if it wasn't, there'd be a total imbalance, for a start, of what's going on in the world. They'd be a total disconnection with what's going on. I think we have a responsibility as people to steward everything ... all our resources, so if it's oil, coal, if it's a farm, farming, if it's the natural world, if it's endangered species, we have a responsibility" (interview 21).

4.15.12 Healing and inspiration

Many participants expressed their delight in being in nature (some lamenting that they did not have the opportunity to do so at work despite working in the environmental sector!). Participants often referred to nature as a restorative place, a place of tranquillity, peace, non-judgement, joy and bliss, not just for themselves but also for those they worked with (both colleagues and clients). Some referred to the spirit of a place, the wildness or specific fauna and flora associated with it, the essence of a place that can be felt and to the desire and satisfaction of being in wild or natural places and the freedom that comes from

that (interview 9).

Other participants talked about the abundance of the natural world (contrasted with scarcity in the human world), the sheer fecundity, creativity and resilience of nature. One participant (interview 1) had two dramatic experiences (epiphanies may be a better word in terms of the lasting impact) of the “generosity of nature” in the sheer profusion of raspberries and orchids that (s)he observed (section 4.14.5).

Participants would also talk very specifically about their own specialist area and what it was like working with the flora, fauna or landscape that really moved them. One participant commented on what (s)he most loved about working with bats:

“I think they’re cute and cuddly and all sorts of things as well but not everybody agrees with that. I think that everybody in the bat group would say they think they’re lovely. We try to get that across to other people” (interview 27).

4.15.13 Our life support system: Extrinsic value

This section complements the analysis of the extrinsic value of nature (theme 2, section 4.13.10).

Extrinsic value is our life support system and is normally equated to the value of natural services (ecosystem services or natural capital), which provide a benefit for humankind (theme 2, section 4.13).

However, the participants often took a wider view and focused on its value as humanity’s life support system (for example, interviews 6, 9, 10, 30, 35). There was a foundational belief amongst them that nature is not just a ‘nice to have’ but is essential to our health, wellbeing and survival. Participants often contrasted their view, as scientists, ecologists, biologists and conservationists, with the disconnection in mainstream society in relation to just how important nature is to human survival:

“I do stuff for the environment because I understand that if I don’t, I and my future generations of me have no future because we are all so interdependent upon life on this planet” (interview 30).

This view was held by all of the participants. During the interviews participants would often commence talking about the value of eco-system services, natural capital or wellbeing, but their heart was not in it and, on a number of occasions they retracted their comments because of their dislike of the terminology, or they quickly moved on. This is *not* because they do not believe in the extrinsic value of what nature provides for humankind (or the necessity of using it when engaging with the outside world for funding, to influence policy or to achieve their organizational purpose). They simply recoiled from putting a price upon it outside these contexts.

4.15.14 Key linkages

Looking in detail at what the participants do and why they do it highlights the purpose driven nature of the participant organizations. It links the participants’ personal connection with the natural world (themes 2 and 3, sections 4.13 and 4.14) with the collective endeavour of making a difference (theme 5, section 4.16). It also highlights important contextual information, in particular, the relationship between the participants’ deep desire to support the natural environment and the accelerating environmental crisis, which the participants (who are working at the environmental ‘coalface’) perceive as being far more

serious than is acknowledged by political decision makers, the business world and the general public. In addition, their strong connection with the natural world makes the crisis intensely personal for the participants and fires their commitment and determination to act to bring about a major change in awareness and a willingness to change.

This theme is sandwiched between the core themes of connection to nature (themes 2 and 3) and the coordinating theme of organizational response (theme 5). It brings to light the key significance of a major change in the remit of environmental organizations, from nature-based to nature and people-based organizations. This change has happened relatively quickly and has significant implications for organizational funding and viability with changes to the nature of work (increased project-based work, collaborative ventures) and the ability of environmental organizations to leverage their resources (theme 7, section 4.9).

4.16 Theme 5: We make a difference

How do we do what we do? We make a difference.

Without 'them' there is no 'us', we move the world from separation to connection: We stand and work together, bonded by shared values and a common, aligned sense of purpose with which we reach out to others and the natural world in order to make a difference. Our focus is on action, doing something practical and specific.

4.16.1 The narrative

This theme explores *how* participants achieve their objectives and builds on theme 4 (section 4.15), what and why do participants do what they do. One of the most common statements by participants was the desire to 'make a difference' and they do this by standing and working together, bonded by shared values and an aligned sense of purpose, which enables them to reach out and engage others (theme 7, section 4.9). This was most often expressed in the form of helping others connect, to move from a sense of separation to one of connection, which is captured in the expression, used in the environmental sector, 'without 'them' there is no 'us'', a recognition of the interdependence of all things.

For participants this sense of aligned purpose is very rarely a theoretical construct, but instead one that is intensely practical and grounded. It brings together staff, volunteers, members and other stakeholders to achieve specific social goals within the overall remit of the organization and forms the basis of working collaboratively with others. This practicality can be prosaic. One participant described his/her connection with nature in terms of "getting your hands dirty and crawling around a loft ... in a big pile of bat poo!" (interview 27).

Participant organizations are driven by a strong societal remit, in the form of supporting the natural world, and exhibit a strong sense of mutuality and collective purpose, which is expressed in cohesive value-oriented cultures (Collins and Porras, 1996; Weeks 2006; Goldman and Casey, 2010; Schein, 2010). The

profit motivation is not central to these organizations, although financial viability and sustainability are essential to meeting their core purpose. This links the core purpose, mission and vision to the strategic thinking process (theme 6, section 4.6) and broader strategic processes (theme 8, section 4.10) as well as enabling the organizations to reach out to their extended communities of interest (theme 7, section 4.9).

This theme is strongly related to themes 1 to 4 (sections 4.12 to 4.15), which *together* form the relational foundation (research question 3, section 4.11) that underpins the strong purpose driven nature of the participant organizations (theme 6, section 4.6) and drives the strategic processes within (research questions 1 and 2, sections 4.5 and 4.11). All play an integral role in enabling participant organizations to do what they do. Theme 5 thus plays a critical role in linking the relational foundation of participating organizations (themes 1 to 4) to the strategic processes (themes 6 to 9), although the themes are more interconnected than this simple framework conveys. The literature associated with themes 1 to 5 is tightly integrated and is discussed in detail in section 4.11.

Engagement is key to all participating organizations and the process that participants adopt to do so is key to this theme. They reach out to extended communities of interest, those that share an aligned sense of values and purpose, forged by an intimate but shared connection with nature (theme 3, section 4.14), which might be described as 'circles of identity' (theme 1, section 4.12). This process might be seen as a series of ripples moving outward across a body of water. It is key to both building the organization to meet organizational purpose and operational objectives (extending the member and volunteering base etc.) and to ensuring long term sustainability (theme 7, section 4.9).

Engagement is predicated on winning 'hearts and minds', the thinking and more emotional aspects of potential supporters, recognizing the diversity of ways in which people see the world, both cognitive and more embodied (Gardner, 1993, 1995, 2003 and 2011; Robinson, 2011). It is therefore a process that connects the values, beliefs and experience of those within the organization (internal culture) with those outside the organization (external communities). This connection is for one purpose only. To make a difference.

Participants rarely used the word, culture, although they did talk frequently about the importance of strongly held values and beliefs within their organizations, which are important building blocks of organizational culture. Underlying values, organizational culture and the strategic processes were strongly linked (Collins and Porras, 1996, 2005; Goldman and Casey, 2010; Schein, 2010). The strategic processes have emerged over time (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015) to enable participants to meet their core purpose, which is an expression of their shared deeply held values. These drive the strategic processes rather than the other way around. The phrase, 'culture eats strategy for lunch' (Weeks, 2006, quoting Dick Clark, Merck's former CEO), neatly encapsulates the potential outcome when there is a clash between desired actions and an organization's core values, beliefs and assumptions (Goldman and Casey, 2010, drawing on Weeks, 2006). This strongly resonates with the participant data and the process of resolving conflicts and tensions consequently plays an important role in participant organizations (theme 9, section 4.7).

The overriding importance of purpose, mission, vision and underlying values and beliefs within participating organizations made this literature strand particularly pertinent. The way in which any enterprise defines itself has important consequences (Morgan, 2006) and the participants' story is a good case study of how this principle plays out in practice. Although there are some similarities with entrepreneurial ventures in this area, where strong internal cultures, leadership and organizational history can be important factors in strategic decision-making (McCarthy and Leavy, 2000) participant organizations are defined in terms of their passion for changing the world and thus retain an external focus despite strongly held values and beliefs (Drucker, 1989).

4.16.2 We stand and work together

When participants discussed *how* they achieved their objectives, whether at the overarching level of core purpose or at the more specific level of the many and varied activities that contribute towards this purpose, they touched on a number of key themes; the importance of engaging people and sharing a sense of connection with nature (section 4.16.3) the overriding goal of being able to make a difference (section 4.16.4), the key role that shared values and culture play in enabling them to stand and work together towards common goals (section 4.16.5), the importance of narrative and stories and the 'golden thread' that links everything together (sections 4.16.6 to 4.16.7) and the practical foundation of achieving purpose through action (4.16.8). These common beliefs and values unite participants in their work as an extended community, both within organizational boundaries and beyond them.

4.16.3 Engaging people is key

Reaching out and engaging people is key to participations organizations, both to achieve their specific objectives (flora, fauna, landscape or species specific) and to inspire others with the sense of connection with the natural world that they feel. Participants use a variety of ways to engage others, through education and outreach, practical engagement, research and knowledge (through a variety of forms including wildlife reserves, visitor centres, community engagement and volunteering activities, education, training and research events, links to other institutions including universities and so on), advocacy, campaigning and direct action (often linked to influencing policy and wider public opinion).

There was also a strong scientific element to many of the participant organizations' remits with a concomitant need to provide scientific evidence to funding bodies, decision-makers and, sometimes, the general public. However, participant organizations tend to tailor their engagement according to the recipients and the nature of the engagement activity. Attracting members and volunteers, for example, may require quite different communication approaches:

"Interestingly there is a ... divide within the core conservation and advocacy work carried on by the environmental organizations, between evidence- or science-based conservation (emphasising benefits for humans ... natural capital, the value of 'eco-systems' – extrinsic value) and a motivation born of an appreciation of the innate, intrinsic or inherent value of the natural world (requiring an approach based on stewardship not ownership)" (Researcher interim memo note, June 2019).

Participants' commenced the discussions on engagement from a starting point of a personal and shared connection with the natural world. One participant (interview 14) summarized this point by linking engagement back to the unique personal experience of connection of the receiver, recognising the role of environmental organizations to be the spark, the inspiration, that enables individuals to discover a greater sense of connectivity but also the inherent limitations on controlling what an individual might choose to do with this new-found awareness:

"Engagement is when they choose to be involved and that requires, that needs a spark, it needs something inspirational to happen at that moment that makes them make the choice. I don't think you can force engagement on people. You can inspire engagement and I think it's part of our job in the sector ... to be that spark. Is it not? But then we've got to live with the consequences. People might be inspired to do things we wouldn't have chosen ... we've got to cede some ground in this process and we're not very good at that" (interview 14).

When participants reach out to engage others they generally communicate through the specific remit of their work. One participant observed that the animals at the centre 'act like ambassadors for their wild cousins' (interview 2), thereby identifying a very specific contribution of the organization. However, a more general sense of sharing the importance of having a connection with nature was almost always present or implicit in the process:

"[We] need to change public opinion because you need to make sure that the highest priorities are not illegal immigration. The highest priority is saving the ocean to save ourselves. None of us would be here with a dead ocean" (interview 31).

"[It's] trying to strike that balance between the sites being good enough and making sure that people understand the value of the environment to their lives, otherwise we're not going to make the changes that need to be made to [*speaks softly and quietly*] make biodiversity improve because it's still dying, it's not doing well" (interview 7).

"The important thing when we start [a] new project is ... sharing our philosophy, not only the technical [*details*], not just saying we don't use chemicals, we don't use fertilizer, but ... what we want to do is to share our views of Natural Agriculture, so that people can understand [*that the*] soil, it still has the power to nurture plants and only the sun, water and the soil create energy to grow food, so we just be patient [*laughs*]. We have a healthy growth of plants ... So that our principle [*is*] to share that idea ... not just a technique" (interview 6, native Japanese speaker).

Engagement is a broad remit and operates along a very broad spectrum of organizational activities. The core objective may be to recruit more members or encourage more volunteers but it often extends into all the activities that an organization undertakes (finding good staff, scientific research or monitoring, citizen science projects, campaigning activities, community and collaborative endeavours and so on) and even to other conservation organizations:

"It's about not preaching to the converted, so it's trying to make sure that we're reaching people that would never normally come to an environment centre, or maybe have ... no interest in wildlife or the environment just now and, maybe, inspiring them for the first time, maybe helping to change behaviours, opening their eyes to wildlife and the importance of the natural environment, so that actually the lead on from that is that [*they might*] care and might take action, they might change their behaviour, they might go and join another organization or they might go and visit somewhere else, but it's about trying to reach and engage an audience that's currently not engaged with wildlife and the environment" (interview 19).

"The biggest achievement I can think of would be to engage a wide number of people and make

them aware that they can not only see whales and dolphins around British waters but they can also contribute to our scientific knowledge and monitoring of the species ... and help their conservation. And, if there were other achievements, it would be to have actually helped in making some of those conservation actions work" (interview 8).

Engagement also has a strong policy remit, influencing public opinion and decision-makers (for example, interviews 30, 31) and a key role in building community, which is central to the work of many participants. Depending on the core purpose, organizations may be interacting with local communities in their areas, volunteers, other overlapping environmental organizations, educational establishments, local councils and government agencies, environmental bodies or simply interested individuals:

"It is a really important ... that community element was always built in and it now engages people from the South Coast of England to Shetland ... it has those different strands, which I think, you cannot now untangle ... without losing something quite essential about the spirit of the [organization]" (interview 14).

Engaging and building communities is central to the work of participants, not only for reaching out to new members but also for providing an opportunity for others to experience a sense of connection with nature for themselves. Indeed, a strong community identity may be incorporated into the foundation documents of the charity (interview 19, section 4.16.4). Community engagement is also directly linked to the ability of the organization to achieve its core purpose because it allows it to scale up, thus allowing it access to a much larger resource base based on collaborative endeavour (theme 7, section 4.9):

"We're in the business of scaling up our impact ... we can't do it on our own, we can't do it tree by tree, we can't do it volunteer by volunteer, we've got to find a way of working with and supporting others, otherwise it won't happen" (interview 35, full quote, section 4.9.1).

This broad remit, a concern for the state of the natural world as a whole and a recognition that it is in crisis (theme 4, section 4.15), never seems to be far removed from the specific remit of the participant organizations. One of the broadest themes to emerge from the data is that the specific and the whole go closely hand-in-hand because participants believe and act as if they are closely connected. In other words, the specific and the whole are not separate but interconnected, not one or the other but both simultaneously (linked, perhaps to the ecological perspective of the participants, section 4.13.3). This is reflected in the belief that once one person has connected to nature they too spread the word to others:

"They tell all their other friends and family and so [on]" (interview 27).

"You can never do enough of trying to reach out to the community of all different backgrounds, ages ... [they] will go back and talk like crazy to their husbands, their partners, their children, grown-up children and their grandchildren, and so you've actually spoken to a lot more people ... I think community is a really important way ... the younger the better ... because if something's with a child from their first sort of memories they may go away from it for a bit but I think it will always be there" (interview 17).

4.16.4 We make a big difference

Participants aim to change the world for the better (sometimes expressed as their legacy) both through supporting the natural world directly and in transforming people through their connection with the natural world (theme 4, section 4.15). They explained *how* they achieve what they do, how they meet their organizational purpose and objectives, in terms of standing together with others who share a set of common values and/or culture based on a diverse but shared experience of being connected to nature

(themes 2 to 4, sections 4.13 to 4.15).

This shared connection experience (theme 3, section 4.14) may be expressed through a wide variety of forms and perspectives (theme 2, section 4.13) and thus not be readily apparent on the surface (for example it may include strong social or community perspectives rather than be strongly nature-based). However, it acts as the underlying normative glue that binds the organization together and allows it to draw upon the resources of a strongly motivated, often passionate and committed, staff base and extended community (theme 7, section 4.9).

These internal and external communities work, volunteer or financially support the participant organizations as an expression of their values *as well as* normal market-based factors (remuneration, benefits and so on). This has significant implications for the participant organizations, including high motivation levels and commitment, the ability to leverage limited resources through volunteering, staff working for remuneration levels below market rates and other less visible benefits, such as extending the organizational reach through formal or informal collaboration with other organizations (research question 2, section 4.8). In short, extended communities of interest identify, at some level, with the core purpose of the organization or with the deeper values that it embodies. One participant termed this “a big sometimes noisy community” (BW1, group interview 37, multiple participants). Without this the organizations would not be able to do what they do (theme 7, section 4.9). As a result, engaging and building communities is seen as central by many participants to their work and is sometimes built into their remit from the very beginning:

“*[The origins of the organization lie in a] community-based initiative that was aiming to achieve several objectives, primarily to allow people to experience and be inspired by wildlife on the doorstep here using the latest technology. And, at the same time, get some core environmental messages across and also help the local area and the town regenerate in terms of tourism regeneration, revitalization*” (interview 19).

The financial structure of the participants’ organizations also shows how important this is in terms of leveraging their limited resources (research question 2, section 4.8). One participant organization (interview confidentiality respected) had an income stream of some £150,000 in 2017 with only one full time staff member, supported by three part time members of staff, over a hundred volunteers and considerably more members, which clearly demonstrates the potential value and significance of volunteers and members. For another organization, the extent of the contribution of volunteers is evident in the numbers:

“We’re still very much a grassroots small organization ... we only have about 30 staff in the whole world, then about 10,000 volunteers ... that’s probably about 10,000 properly active volunteers in the world” (interview 31).

The desire and ability of participants to make a difference, was normally expressed through the specific purpose of the organization but very often, simultaneously, in more general terms underpinned by the value of the natural world, which often plays a key role in driving the participants:

“I want to be remembered for making a positive impact on wildlife worldwide ... part of what I do ... involves not just helping animals ... but also people ... it’s all linked together, it can’t be

separated” (interview 29).

“You don’t come [*here*] to earn lots of money. You come here to make a difference ... people do it because they’re passionate about the environment. They actually want to make a difference” (interview 21).

The importance of making a difference came across in the many personal stories relating to the impact of participants’ work with both nature and people (theme 4, section 4.15):

“One of the most successful stories here is about a guy who hadn’t worked for 14, 15 years who came here initially volunteering, on a sort of a back-to-work programme, and now works for the organization, whose GP said to him, “I never thought you would get back into work. I never thought that would ever happen. I’m just amazed” (interview 21).

4.16.5 Shared core values and culture

Participants often discussed making a difference in the world in relation to their deeper values and a sense of cohesive community that enabled them to achieve a common purpose. This was closely connected to a strong sense of moral duty of care expressed by clients when they discussed who they were (theme 1, section 4.12). Core values include a sense of responsibility as stewards of the world, a belief that all beings matter (human and non-humans) as well as the natural world as a whole (flora, fauna and landscape). In addition, there was a moral and ethical sense of righteousness and a belief in fairness, justice and equity (often expressed as looking after the disadvantaged in the world) and demonstrating compassion, empathy and equity when interacting with the world (theme 1, section 4.12).

Core values and culture were often referred to as the ‘ethos’ of the organization by participants. Ethos (derived from the Greek word for character) is defined as “the characteristic spirit of a culture, era, or community as manifested in its attitudes and aspirations” (Google Dictionary, 2020; Appendix G). The specific words within this definition (“community”, “attitudes”, “spirit of a culture” and “aspirations”) all fit the context and meaning that participants attributed to the word. The organizational ethos included species specific values (interviews 5, 27, 28, 29, 30) but was also deeper and more complex, going beyond the environmental remit alone and representing the coming together of life values that bind the organization together, both visibly and invisibly.

Whilst many of these values are universal, the difference for the participants is that they were willing to extend these values, including those based on moral and ethical perspectives, to the natural world as a whole (theme 1, section 4.12):

“The two things in this world that really rile me are injustice and cruelty so what I mean by fair is the counterbalance to that. I believe in social and environmental justice but I also believe in democracy so ... when I say fair I try to be balanced, measured, pragmatic, but, at the same time, you have to nail your colours to the mast so I suppose the counterbalance to fair is passionate ... Most people want to see justice to other members of their own species and I think, increasingly, justice to members of other species” (interview 10).

The critical importance of shared values and culture to participating client organizations was often expressed in terms of the passion and commitment of the staff team to the cause, the core purpose of the organization:

“What’s my biggest problem with my staff, what’s my biggest issue I have with my staff? You go and take your bloody holidays. Take your holidays right! Take ‘TOIL’ time [*Time Off in Lieu*]. You need it because all that we’ve got is you, you need to be fit and ready ... I have a fantastic staff team and it’s because they’re a group of motivated people who believe in what they do and see the impact in what they do. It’s a luxurious position to be in” (interview 23).

“Are we being consistent in how we communicate our values being clear across the organization ... whoever you meet here or whoever you see, you get the same feeling or the same sense of purpose” (PW2, group interview 37, full quote section 4.6.2).

Strong values, based on shared experience and conviction (often not shared by the wider world, theme 1, section 4.12) and threatened by the environmental crisis (theme 4, section 4.15) provide the foundation upon which the participants stand and work together towards shared goals and core purpose. This underlies the capacity to act collaboratively, the ability of participants to support each other (internally and externally in broader communities), break down broad purpose into achievable goals and objectives (often at project level) and align individual and organizational values. Participants feel that they have a role to play, however, humble that role may be. It is in aggregating the individual passion, motivation and commitment that the power of collective action to make a difference lies:

“We’ve just agreed we’re all pissing in the wind, basically, at the organizational level. I know that my organization feels best when we get closest to everybody being united and celebrating the modest successes we have ... the nearest I can get to optimism is that I’ve had the experience of showing people bits of the natural world, opening people’s eyes to bits of nature that they haven’t experienced before, and that sharing is a phenomenally powerful and precious thing, and the challenge is how do we do that as widely as we can because that’s the bit that makes a difference” (BW3, group interview 33).

Participants often found it difficult to express the core values (or culture) of the organization and one participant organization, which was undertaking a formal exercise to understand organizational values more fully, described the process as difficult (interview 35). However, participants were very aware of their own values and felt them strongly, even if they could not always put them into words:

“I can’t explain what my values are but I can explain when I know it’s been crossed” (interview 35).

Participants also often demonstrated their values by changes to body posture, tone and volume of their voice and other subtle physiological changes, for example, one participant’s voice trailing off in a whisper when (s)he said something of critical importance to him/her (interview 7, sections 4.13.3 and 4.16.3). The personal values of participants were diverse and are not always easily elucidated in organizational terms but nevertheless provide a common shared foundation at a deeper level despite superficial differences that may exist.

Although most participants did not use the term, culture, some did. One participant talked extensively of consciously setting out to create a culture, based on shared values including valuing and supporting each other:

“I’ve created a culture across my section, I’ve worked very hard to do that ... and I think that people in my team would be able to represent the culture to you if you spoke to them, they might use different words, but I think they’d all be able to exclusively state what the culture is across

our section ... certainly ... there's a very clear culture about valuing each other, and the belief that change is possible with all the people we work with ... about valuing the people we are working with, and a real culture of support and that's something" (DW3, group interview 34).

Nevertheless the pre-existing values of the staff, based on their connection to the natural world, were also critical and provided the foundation for working collectively:

"More collectively the staff group as a whole had actually a fairly shared value-based thing. When you're working in an organization like this ... nobody works here who hates the environment, everyone working here has a *shared love of the environment* and of being part of, and working within, the environment. So, you've got core values that people shared anyway" (DW3, group interview 34, researcher italics).

Not surprisingly, values were also critical in the recruitment process (for example, group interview 33).

4.16.6 Narrative and stories

Participants often talked about the power of expressing shared core values through narrative and stories (increasing the sense of bonding within the organization and engaging others outside the organization through sharing a narrative of the world around us). The process of engagement is gradual and persuasive, often experiential and reinforced by the power of storytelling, which roots principles into a personal, yet universal context:

"What we have to do to condition people to the reality of connecting with nature is we have to break them in, very gently, to what the real story is" (interview 12).

"People come in [*to the visitor's centre*] and they appreciate, and they listen" (interview 13)

Many participants saw narrative and story as vital in organizational communication, to engage people and help them translate concepts and ideas into something tangible, which they can then identify with. This topic came up throughout the interview process, particularly with participants that had a strong brand and/or strong marketing and communication capabilities (for example, interviews 10, 19) and for those involved in campaigning, advocacy and direct action (interview 31, sections 4.12.7, 4.14.10, 4.14.11, 4.16.3 and 4.16.4).

Participants believed that engagement is best achieved by appealing to both hearts and minds, rational thinking and an emotional response (a more embodied approach to communication rather than a strictly cognitive one). This requires the organization to listen as well as speak, to engage practically as well as mentally. By doing this even a detractor can be brought round and detractors sometimes become the organization's most passionate supporters (for example, interview 33):

"We had a number of farmers who were really, really resistant to the translocation [*of the species*] for many, many reasons and one in particular, he was massively vocal about it, and over the course of the last three years, he has completely turned round to the extent that we have ... release pens up above his farm and he would drive out when I go up and see at night, he would drive up on his own quad bike and check it was me and not somebody else and he would phone us up and say, "oh there's some mountain bikers around the pens", because he saw them as *his* I think that's the difference" (BW8, group interview 33).

"We used to say that if we got a dissenter to turn [*around*], they are then you're best mate,

because they can really explain, 'I thought this and now I think that', and that's one of the most powerful messages you can get" (BW1, group interview 33).

4.16.7 Pathway to collective action

Several participants used the expression, 'the golden thread' (the idea of a thread within us that is inked to our purpose and runs through our lives) to link this sense of connection from deep personal experience to shared collective understanding and then through to organizational purpose, mission, vision and finally achievement:

"it's the golden thread isn't it, it's the [*shared*] understanding ... all of my teams are fully aware of what the wider goals are and what we're working towards ... they are very clear on what their part is within it ... 'this is why we are doing that, that's why it ties in' ... they get it, they understand where they're part of the bigger picture and how that works" (interview 23).

This concept captures the passion, commitment and certainty of purpose that many of the participants demonstrated. The American poet, William Stafford (1914 - 1993), uses the expression in his poem, 'The Way It Is', which strongly resonates with many of the responses given by participants to the question of why they chose to do what they do (theme 4, section 4.15). Their responses include their feeling of being outsiders (theme 1, section 4.12) and their sense of community within the sector (theme 7, section 4.9) where they experience a sense of shared purpose (themes 2 and 3, sections 4.13 to 4.14) and felt that they were, perhaps seen and understood by others in their community. In this they follow a 'golden thread' that runs through their lives and is constant in a world of change, one which others frequently cannot see.

Some participants linked their personal passion for the work that they do directly to the organizational purpose, mission and vision of the organization:

"I know [*where*] my role fits ... we're not just working in isolation ... we know what we're doing and we know that we're working as part of the bigger picture and ... I see myself as like a front-line person on the coal face ... but I know what's going on higher up because it's told to me by [*the Chief Exec*] and by the rest of the guys in SLT [*Senior Leadership Team*], so I'm aware of where I fit into it ... I feel valued and it gives me confidence" (interview 25).

4.16.8 Call to action: Practical and specific

Participants also shared a practical orientation, and often expressed the need to *do* something. Many talked about the joy of doing *practical* things connected with nature; the land, habitats, flora and fauna, rocks and minerals. They often referred to practical and specific elements of their work as being fundamental to their sense of fulfilment, linking it directly back to their connection with nature. It was almost always very specific. One participant (interview 3) referred to the "nitty gritty" of the experience, "the moment when you are... looking at, touching, smelling ... sensing" (section 4.14.11) and the joy of working on the land, "I was happiest when my work was practically outside managing a piece of land" (BW3, interview 33).

Others echoed the intensely practical nature of the joy emanating from their connection to nature. This

strong attachment to physical contact with the natural world seems to ground participants and keeps the importance of their connection with nature at the forefront of their lives (for example, interviews 2, 9, 11, 18, 19, 27, 28). At the root of it lies the participants desire to make a difference, to *do* something about what is of the utmost importance to them:

“They’re telling us what we already know ... I don’t constantly want to be told, ‘it’s too late’ ... I want to *do* something about it” (interview 21).

“Engaging the public in our flying demonstrations, which is the principle way in which you engage with the public ... I think that that is a really important part of what we do ... to actually engage with people and get them to care ... seeing it for yourself with your own eyes is so different from seeing it on TV” (interview 28).

“It will always be practical ... it will always have a very strong practical aspect to it” (interview 7).

Participants also talked about the role of practical engagement with the natural world in inspiring volunteers, the desire to be “involved in something that’s bigger than yourself” (interview 3, section 4.11.2) and that most of the participants began as volunteers, an indication of the passion and commitment of those working in the sector (interviews 3, 17, 32 and group interview 37, section 4.9.4).

4.16.9 Key linkages

The joy and satisfaction that participants derive from taking practical action to make a difference is linked directly to their sense of connection with nature and the *experience* of a shared connection process (themes 2 to 3, sections 4.13 to 4.14). It is not only the depth of the specific connection with nature that matters but the sense of a shared, albeit very diverse, common experience of the connection process itself. This underlies *what* participants choose to do with their lives and *why* they do it (theme 4, section 4.15) and it fuels *how* participants organise collectively in order to make a difference by working together. It also links the individual and the personal to the bigger ‘strategic’ picture, including achieving the purpose and goals of the organization (theme 6, section 4.6). Paradoxically, the importance of the specific, personal, often practical and experiential level does not come at the expense of the bigger picture. This collective action becomes the foundation of purpose driven organizations.

4.17 Conclusions

The participants analytical story is best presented top down but understood from the bottom up. The data analysis is thematic and textual allowing the analytical story to emerge in its full richness and complexity. The inductive, qualitative methodology enables the participants’ story to emerge through ever increasing levels of abstraction but also recognises that the rich, deep data is heavily imbued with meaning. The chapter is structured to enable the story within the data to speak at both levels.

Nine key themes have emerged from the data analysis and each has its own narrative that is both deeply interconnected with the other themes but also has its own story. These themes are explored using participant quotes wherever possible so that they are told, as far as possible, in their own voice, providing a wealth of detail for practitioners in the field and contributing to the praxis literature (Whittington, 1996;

Goldman, Scott and Follman, 2015). The themes are also clustered by research question and explored within the theoretical context of the extant body of the literature to produce an overarching narrative, which leads to new conceptual insights and theory development. Importantly, however, the two pathways continue to inform each other throughout the data analysis process, with insights at the individual thematic level continuing to inform theory development, often in unanticipated ways.

Participant organizations are purpose driven and relational (research question 3, section 4.11). They exist in order to make a difference in the world, they are founded on the participants' deep connection to the natural world (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Nisbet, Zelenski and Murphy, 2009) and this is of the utmost importance to them (Drucker, 1989). Core purpose, mission and vision, expressed through deeply shared values (ethos and remit in the terms of participants) drive the strategic process, sometimes formally, often informally (research question 1, section 4.5).

Critically, participant organizations have learned to speak two different languages, one to 'insiders', an intrinsic language to extended communities of interest (Granovetter, 2005), which share their deeply held values and purpose, and another to 'outsiders', an extrinsic language to more traditional external stakeholders. Participant organizations need both groups of stakeholders for long-term sustainability and to meet their purpose. As a result, their strategic processes have emerged (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015) to enable them to meet the different needs, perspectives and worldviews of these stakeholders. This enables them to leverage their limited resources effectively (research question 2, section 4.8).

As a result, whilst the term, strategic thinking, was rarely used by participants, its function is embedded within the organizations, formally and informally, operating at pivotal points and acting as a proxy for core purpose and values. It is both reflective and active, most frequently found within the relationship between the executive and non-executive team but also found in the processes and coordinating mechanisms that integrate the strategic thinking and planning process and, in some of the larger organizations, within broad consultative processes. It plays a key role in reconciling, and sometimes simply holding, the tensions, conflicts, challenges and issues that arise from the conflicting demands of different stakeholders (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010) and maintaining different perspectives and worldviews simultaneously (Pache and Santos, 2013; Pircher, 2016; Dahlmann and Grosvold, 2017; Rey and Ricart, 2019).

Chapter 5. Conclusions

5.1 Introduction

This chapter summarises the findings of the research study as an integrated whole and by the individual research questions, recognising the inherent limitations of an inductive, embedded case study methodology. It identifies the contribution of the research at both theoretical and practitioner levels and identifies key areas for further research, noting how this might benefit the building of new theory and practice in the field. It also evaluates the research findings in relation to the original research aim and rationale of the research study. Finally a brief personal reflection is provided on what the researcher has learned from the research process.

The participant story that has emerged from the inductive research methodology is complex, interconnected and multi-layered, and is underpinned by deep, rich data. This produces an integrated, although context-specific, framework for strategic thinking within small and medium-sized environmental organizations in the UK with valuable contributions to potential theory development and professional practice. The key findings include the importance and nature of the participants' connection to the natural world, the embodiment of this connection within the purpose driven strategies of the participant organizations, the emergent and embedded nature of strategic thinking within these processes, the way in which the organizations manage different stakeholder needs and perspectives in order to leverage their limited resources and the fundamental importance of the relational nature of the overall strategic process.

These findings are often in areas where there is a paucity of existing literature, particularly in the context of not-for-profit and small and medium sized organizations. This provides a focal point for future research, which could extend the potential for theory development beyond the limitations of the inductive embedded case study methodology used in this research study.

5.2 Key findings and contribution

The aim of the research was to explore the nature of strategic thinking from a broader and deeper perspective focusing on small and medium-sized environmental organizations and determine whether there is a link between the participants' sense of connection with nature and the strategic thinking process. The underlying rationale is that a diverse range of human sensibilities of perceiving and understanding the world may be reflected in a more holistic thinking process. The participants' analytical story does not confirm a strong, direct link at an organizational level but it does suggest that individual decision-makers embody a broad range of different sensibilities, or intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011) and employ them at an individual level within the strategic decision-making processes and, more importantly, that there is a powerful indirect link through the purpose driven nature of participating organizations. The link is thus complex and relational.

The participants' analytical story is complex, nuanced and interconnected. Participant organizations are purpose driven (Ghoshal and Bartlett, 1997; Collins and Porras, 1996, 2005; Drucker 1989 [mission]; BoardSource, 2005; Hollensbe et al., 2014; Hurth, 2017; BAM, 2018, 2019; Beng Geok, 2018; Thakor and Quinn, 2018; Rey, Bastons and Sotok, 2019) and relational, not profit oriented (research question 3, section 5.5). Core purpose and deeply held values (Senge, 1990; Collins and Porras, 1996; Goldman and Casey, 2010; Schein, 2010; Mitroff, 2016), linked to a strong connection to the natural world (Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009), drive the strategic processes. Participants' steer their organizations through 'fundamentals' or guiding principles, which act as a proxy for core purpose, and are embedded within, or alongside, other key processes including strategic planning, governance and consultative processes that reach out to extended communities of interest (Granovetter, 2005). These pivotal places act as the heart of strategic thinking within the organizations (research question 1, section 5.3; figure 12, section 5.3).

Strategic thinking and strategic planning operate as parallel processes within the participating organizations, enabling them to communicate with, and meet the needs of, multiple stakeholders with different perspectives and worldviews on the value of nature. Both processes are critical to their ability to leverage their resources (research question 2, section 5.4). The strategic processes of participating organizations are emergent (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), process-oriented and strongly reflect practice-in-action, the accumulated experience and learning that accompanies practical application. This allows them to be flexible and adaptable in *how* they achieve their purpose, mission and vision, yet hold to their core purpose and deeply held values and make a difference in the world directly related to what is most important to them.

The key findings of the research study are linked to the specific nature of these emergent strategic processes and are often subtle. They include the importance and nature of the participants' connection to the natural world, the embodiment of this connection within the purpose driven strategies of the organizations and the embedded nature of strategic thinking within these processes (research question 1, section 5.3), the way in which the organizations manage different stakeholder needs and perspectives in order to leverage their limited resources (research question 2, section 5.4) and the fundamental importance of the underlying relational nature of the overall strategic process (research question 3, section 5.5).

Underpinning these findings are specific insights that are important in their own right; the specificity of the connection process to nature and the importance of different sensibilities or intelligences within this sense of connection (research question 3, influencing research question 1, sections 5.5 and 5.3) and the way in which participant organizations hold, rather than necessarily resolve, opposing and contradictory views held by different stakeholder groups (research questions 1 and 2, sections 5.3 and 5.4).

The participant story that has emerged from the inductive research methodology is complex, interconnected and multi-layered, and underpinned by deep, rich data. This produces an integrated, although context-specific, framework for strategic thinking within small and medium-sized environmental

organizations in the UK with valuable contributions to potential theory development and professional practice.

The data analysis and discussion section (chapter 4) has been structured to highlight these different areas. The summaries by research question enable conceptual insights and theory development to emerge within the context of the extant body of the literature, whilst the underlying thematic analysis provides a wealth of detail for practitioners in the field and contributes to the praxis literature (Goldman, Scott and Follman, 2015). Many areas that impact the research and offer key insights are under researched (purpose driven organizations, governance, stakeholder management), which offers further research opportunities in these areas, which extend the potential for theory development beyond the limitations of the inductive embedded case study methodology used in this study.

There is a paucity of research in many of the key areas of the research study including the environmental sector (Clifford et al., 2013; section 5.6) and there are no directly comparable research studies for comparative purposes. This research limitation reinforces the importance of further research in the development of new theory (section 5.6). At the same time, many of the key insights (table 12) are in areas where there is a paucity of literature, which points to the potential significance of the findings in these key areas. This is highlighted in the implications section of the conclusions (sections 5.7.1 to 5.7.4). The implications may be bounded by the inductive research methodology but they are profound nevertheless.

The research findings and contribution are summarised by research question in sections 5.3 to 5.5 below. However, the findings can also be seen as an integrated whole, with both an overarching narrative (this section) and individual narratives for each theme (chapter 4, sections 4.6, 4.7, 4.9, 4.10 and 4.12 to 4.16), each of which makes a contribution to the praxis literature. This emphasises the deep interconnectivity of the participant data. Figure 11 demonstrates *one* way of summarising this, focusing on the overall contribution to the understanding of strategic thinking, purpose driven organizations and what it means to be connected to nature within the specific context of the participant research group. It identifies the broad contribution to theory development (linked to further research) and to professional practice and links these to both the three research questions and key individual themes. This provides a holistic overview of the findings as a whole (figure 11 below):

The research offers a valuable contribution to the praxis literature (Whittington, 1996; Whittington and Cailluet, 2008; Goldman, Scott and Follman, 2015) and to practitioners working in the field because the participant data underlying the analytical story is deep, rich and provides a wealth of detail about strategic thinking in day-to-day practice. It is extensive (29 participating organizations, 38 individual interviews, four workshop events, including group interviews and participant observation) and it also covers a wide geographical spread across the United Kingdom. Several participants confirmed that they were using insights from the research within their own strategic process, in one case both internally and externally (chapter 4, section 4.4).

Figure 11: Broad Research Contribution

Research Contribution (Broad Topic Areas)	Theory Development	Professional Practice – Key insights	Further Research Opportunities: Areas of Paucity in Literature	Themes	Research Question
Strategic thinking Integrated, context-specific, framework for strategic thinking within small and medium-sized environmental organizations in the UK, including links in purpose driven organizations below: 1 - Ability to leverage limited resources. 2 - Embedded, emergent nature of strategic thinking in key pivotal point and other key insights.	✓	✓ ✓	Strategic thinking in environmental sector and broader not-for-profit sector. Praxis literature (strategic thinking).	6 to 9 6 to 9	1, 2
Connection with nature: A relational model of strategy Understanding a connection with the natural world (context specific) including: 1 - Role of both a broad range of sensibilities and a shared experiential process of connection that is <i>both</i> specific and universal. 2 - Clarifying and integrating the importance of the intrinsic value of nature as well as extrinsic value. 3 – Links to broader, 'foundational', societal values (justice, equity, compassion) and perception of being outsiders).	✓	✓ ✓ ✓	Nature-based literature on connection. Multiple intelligences literature (nature-based intelligence). Praxis literature (environmental organizations and broader not-for-profit sector).	1 to 5 2, 3 1 to 5	3
Purpose driven organizations Small and medium sized environmental organizations as an example of an integrated relational model of strategy, including the ability to leverage limited resources: <ul style="list-style-type: none"> Understanding how a strong connection may be influenced by a shared experiential process of connection. Role of governance in strategic decision-making. Stakeholder management, in particular, how organizations hold (as well as resolve) tensions and conflicts that arise from opposing stakeholder perspectives and worldviews (including speaking different languages). 	✓	✓ ✓ ✓	Strategic literature on purpose driven organizations (outside the commercial sector). Governance in small and medium sized environmental and broader not-for-profit organizations. Stakeholder management in purpose driven organizations and within not-for-profit sector. Praxis literature (environmental organizations and broader not-for-profit sector).	4 to 6 6 to 9 6 to 9 1 to 9 integrate d model	1, 2, 3

Source: Researcher data analysis

5.3 Strategic thinking (RQ1)

How and why does a sense of connection with the natural world impact the ability of small and medium-sized environmental organizations to think strategically?

The strategic decision-making processes within participant organizations have evolved within the context of a complex, turbulent and uncertain environment (Neugebauer, Figge and Hahn, 2015), with the natural world seen as in crisis, both within and beyond the environmental sector. Participant organizations are strongly defined by, and the strategic thinking process has emerged within, this context. The participants' analytical story does not confirm a simple, direct link between the participants' strong connection to nature and an ability for the organization to think strategically, although individual decision-makers use a broad range of different sensibilities, or intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011) within the strategic decision-making process and this can be significant, particularly at senior level. Critically, there is also a powerful indirect link through the collective nature of purpose-driven organizations (section 4.11.6).

Participant organizations steer their organizations through 'fundamentals' or guiding principles, which act as a proxy for core purpose and are embedded within critical decision-making points within the organizations, acting as an equivalency to a strategic thinking process. These are found within or alongside other key processes, including governance, strategic planning and, in some of the larger organizations, broad stakeholder consultative processes. This links the strategic process from the top to the bottom of the organization, both upwards to core purpose, mission and vision and downwards to the strategic process and operational implementation through:

"A golden thread ... bringing it all together ... this is why we are doing that, that's why it ties in ... they get it ... the bigger picture and how that works" (interview 23).

The participant organizations' strategic processes are complex. They are purpose driven and not profit oriented. The strategic processes are driven by core purpose (BoardSource, 2005; Beng Geok, 2018), mission (Drucker 1989), vision (Senge, 1990; Bonn 2001, 2005; Moon, 2012) and shared values, beliefs and the culture or ethos of the organizations (Goldman and Casey, 2010; Schein, 2010; Mitroff, 2016; Cardona, Rey and Craig, 2019). This is underpinned by the participants' strong sense of connection to the natural world (research question 3; Kals, Schumacher and Montada, 1999; Schultz, 2002; Bragg et al., 2003; Clayton, 2003; Mayer and Frantz, 2004; Schultz et al., 2004; Dutcher et al., 2007; Vining, Merrick and Price, 2008; Nisbet, Zelenski and Murphy, 2009). As a result, their strategic processes have emerged (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015), incorporating an important element of strategy-as-practice, accumulated practical learning and experience over the years (Goldman, Scott and Follman, 2015), in order to meet their core purpose.

Participants most commonly described strategic thinking as a way of thinking (Liedtka, 1998, following Mintzberg, 1987a, 1994), closely tied to core purpose, mission, vision and values and rooted in the participants' desire to make a difference in the world; a way of enabling individuals or the organization to make better, more informed and more holistic strategic decisions about the fundamentals, what the organization is all about.

Participants have a strong scientific and ecological perspective and they see their work and their underlying relationship with the natural world in holistic and interconnected terms and this was reflected

in way in which they saw strategic thinking (Senge, 1990; Mintzberg 1994; Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010; Moon, 2012). They acknowledged that the strategic thinking process was complex (Mintzberg, 1994), intuitive (Graetz, 2002), intertwined with strategic planning (Mintzberg, 1994; Heracleous, 1998; Bonn, 2005), practical, emergent and sometimes resembled a craft rather than a planning process (Mintzberg, 1987a) a “fluid process of learning through which creative strategies evolve” (Mintzberg, 1987b, p.66), one that drew from a deeper place.

Participants also put considerable emphasis on practice and action as well as the capacity to think more broadly and deeply. Critically, this action orientation was not only linked to achieving their core purpose and/or objectives, it was also, paradoxically, integrated within their more holistic thinking process, which reflected their strong ecological and scientific mindset (their sense of what needs to be done now, including the ‘little things’, for a desired future, their vision, to be possible). They were often reticent to label it as ‘strategic’ but what they described was captured succinctly by Mintzberg et al. (1998):

“There are times when thought should precede action, and guide it ... Other times, however, especially during or immediately after major unexpected shifts in the environment, thought must be so bound up with action that ‘learning’ becomes a better notion than ‘designing’ for what has to happen. And then, perhaps most common are a whole range of possibilities in between, where thought and action respond to each other” (Mintzberg et al., 1998, p.42).

Participants talked about this broader and deeper dimension of strategic thinking in terms of mind, heart, body and a sense of knowing (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011), sometimes summarised by the short-hand, ‘strong minds and big hearts’. This contrasted with the more cognitive and analytical nature of the strategic planning process. However, participants’ believed that *both* processes were key to their ability to achieve their core purpose and long term sustainability (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002; research question 2, section 5.4). However, participants inevitably returned to the connection with purpose, mission, vision and values, confirming the primacy of purpose over strategy rather than the other way around.

Strategic thinking is embedded within reflective, yet also active, places within organizational processes and coordinating mechanisms (Mintzberg, 1980) that provide the space for tensions and conflicts to be surfaced and addressed. These are often informal and act as a lynchpin within the organization to resolve or simply *hold* the opposing worldviews and perspectives of key stakeholders (Regnér, 2003; Jarzabkowski, 2004; Kaiser and Overfield, 2010; Pache and Santos, 2013; Pircher, 2016; Dahlmann and Grosvold, 2017; Rey and Ricart, 2019), which is critical to the participant organizations’ survival and sustainability, their ability to meet core purpose and also underpins the organization’s ability to leverage their limited resources (research question 2, section 5.4).

This is the heart of the participants’ informal strategic thinking process (figure 12). The critical pivotal points are found primarily within the relationship between the executive and non-executive teams, the integrating mechanisms between the strategic planning and thinking processes (figure 13, section 5.4) and, in larger organizations, in broad consultative processes that reach out to extended communities and integrate them into key aspects of the strategic process. In smaller organizations they are found in

informal meetings and get-togethers, often led by founders or small teams.

Figure 12: Strategic Thinking: Pivotal Places to Hold and/or Resolve Conflicts and Tensions



Source: Researcher data analysis

The definition of strategic thinking that has emerged within the participating organizations has a practical and theoretical dimension:

‘Strategic thinking is a *way of thinking*, all those activities, both formal and informal, that enable an organization to see a whole picture and integrate different aspects of that picture within its key decision-making processes in order to maintain a long-term sustainable position, combined with a capacity to act in order to achieve its core purpose’ (chapter 4, section 4.3.11).

5.3.1 Contribution

The participant story is an integrated, although context-specific, framework for strategic thinking within small and medium-sized environmental organizations in the UK with valuable contributions to potential theory development and professional practice in the sector. This includes the embedded, and largely informal, nature of the strategic thinking process (figure 12, section 5.3), the link between strategic thinking and the purpose driven focus of participant organizations and the importance of the strong shared connection with the natural world, which underpins this sense of purpose (research question 3, section 5.5). These contributions are linked directly to the way in which participant organizations leverage their limited resources (research question 2, section 5.4), which has important practical implications for purpose driven organizations and is a key area for further research. A simplified summary of the research

contribution in relation to research question 1 is integrated into figure 11 (section 5.2).

Much of the contribution of the research study has emerged from the *detailed* participant responses within the data including the complex relationship between strategic thinking and a connection to nature (research question 3, section 5.5), the relationship between strategic thinking and the other strategic processes (strategic planning, governance and consultative processes) and the nature of the pivotal places within participant organizations that have emerged where these processes coincide (figure 12, section 5.3). It is here that tensions and conflicts within the organizations are resolved, or simply held, allowing participant organizations to meet the different needs, perspectives and worldviews of multiple stakeholders, all of which play a critical role in enabling them to meet their purpose and achieve long term sustainability (research question 2, section 5.5). These contributions are important at a conceptual theoretical level, in terms of the praxis literature and for professional practice within the sector.

The participants' story, albeit contextually bound, contributes in another important way to the strategic thinking literature. It supports an emergent (Mintzberg, 1987a, 1987b, 1994; Neugebauer, Figge and Hahn, 2015) and practice-based (Goldman, Scott and Follman, 2015) view of strategy, with complementary strategic thinking and planning processes (Mintzberg, 1994; Heracleous, 1998; Graetz, 2002), both of which are critical to the success of participant organizations. It also supports the view that strategic thinking is a *way of thinking* (Liedtka, 1998, following Mintzberg, 1987a, 1994) incorporating a deeper dimension (holistic, systems-based, interconnected), drawing on a broad range of human sensibilities or intelligences (intuition, creativity, commitment) and above all, "complex and difficult" (Mintzberg, 1994, p.111). Participants strongly resonated with Mintzberg's process view of strategy and strategic thinking without referencing it directly (Mintzberg, 1987a, 1987b, 1994, Mintzberg et al., 1998).

Underpinning these findings are specific insights that are important in their own right; the specificity of the connection process to nature and the importance of different sensibilities or intelligences within this sense of connection (research question 3, section 5.5) and the way in which participant organizations hold, rather than necessarily resolve, opposing and contradictory views held by different stakeholder groups. In these cases the research study is citing literature beyond the traditional strategy canon, from the fields of psychology, the creative arts, philosophy and/or spirituality. It may be that these are context specific to the focused research study but it offers an interesting opportunity for further research in related areas (particularly other not-for-profit organizations).

As an inductive research study the individual themes also have their own narrative. The relationships between the strategic processes (strategic thinking, strategic planning, governance and consultative processes that reached into extended communities of interest) is best understood from the bottom up, by looking at the wealth of detail in theme 6 (strategic thinking, chapter 4, section 4.6) and theme 9 (resolving tensions and conflicts, chapter 4, section 4.7), although themes 6 to 9 are closely integrated as a whole (section 5.4.1). It is at this detailed level, for example, that the relationship between the executive and non-executive teams is fully explored, which may inspire further research and result in a contribution to the governance literature within not-for-profit organizations.

5.4 Leveraging resources (RQ2)

How does this sense of connection contribute to the ability of these organizations to achieve key strategic and operational objectives with limited resources?

Participant organizations are driven by a shared sense of purpose and strongly held values, creating an organizational culture and ethos that reflects a relational worldview (research question 3, section 5.5). They operate on limited resources and need to call on the goodwill, financial and personal support of others in order to meet their purpose and achieve their objectives. They do this by reaching out to others in extended communities of interest (Granovetter, 2005), both internally and externally, those who share an aligned sense of purpose and deeply held values and connect with what they are trying to achieve (those who 'get it'). This process of reaching out and engaging others might best be seen as a series of ripples moving outward across a body of water. In order to survive and prosper, however, participant organizations also need to engage with the wider world in order to attract additional funding and support and to be able to communicate with policy makers and those in control of resources and power (those who may not fully 'get it').

Extended communities of interest act as 'insiders' and provide long term financial stability and resource continuity, the bedrock support for long term sustainability (through members subscriptions, legacies and a commitment from volunteers and others to work for reduced, limited, or no financial reward).

Other, more traditional, stakeholders ('outsiders') also play an essential role in obtaining financial sustainability and the ability to achieve organizational purpose (through grant and project funding, access to policy makers and those in control of resources and power). It is the complementary way in which these two processes act *together* that ensures the long-term sustainability of participant organizations and enables them to achieve their core purpose by leveraging their limited resources effectively. Participants' view strategic thinking and strategic planning as very different modalities (Mintzberg, 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012) but they take both very seriously because they need both to survive and thus make a difference in the world that is of the utmost importance to them:

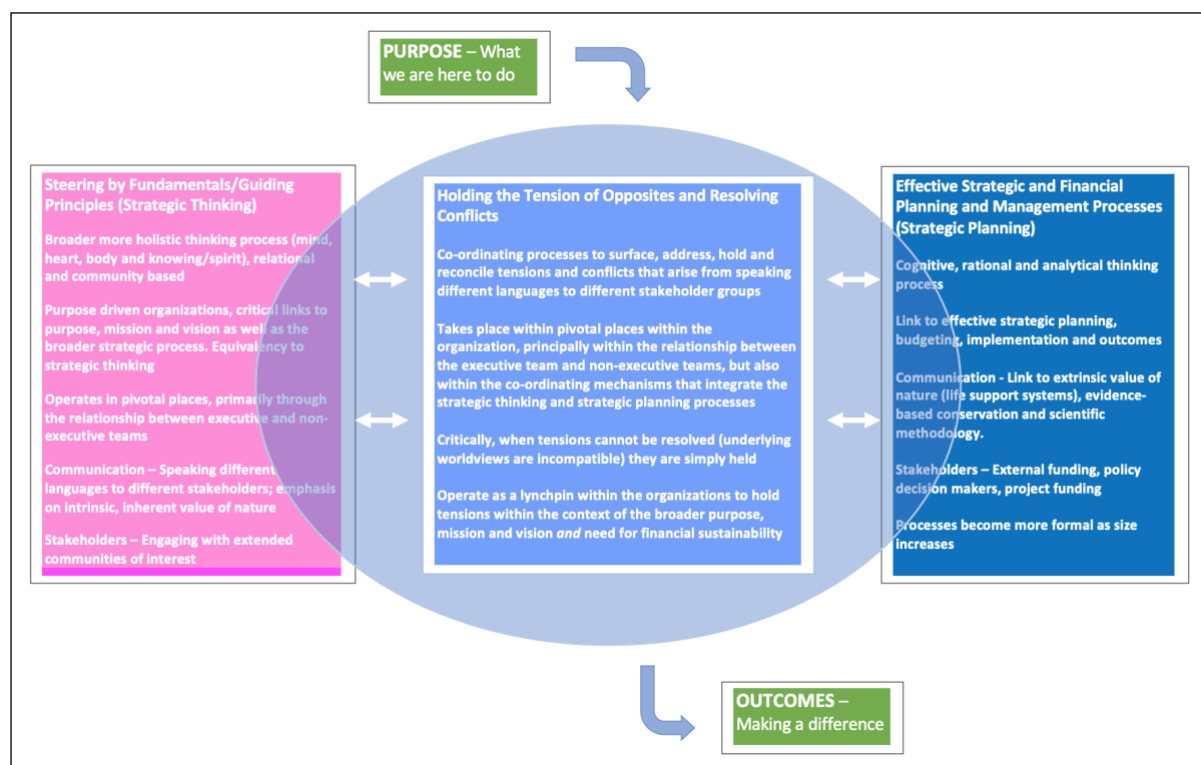
"If it's in the budget then, you know, we are expecting it, if it's not in the budget, then there's discussion about whether or not we have a virement [*an administrative transfer of funds from one budget to another*]. So, it's just the same as any other business. That's the way it's got to be run" (interview 18).

As a result, participant organizations have learned to speak different languages to different stakeholders, reflecting their different worldviews and perspectives on the natural world; one to 'insiders', which reflects the participants' deep connection with nature (Schultz, 2002) including its intrinsic value, and the other to the wider world, which is more cognitive and analytical and focuses primarily on extrinsic value (research question 3, section 5.5). By developing parallel, but loosely integrated processes, to support the needs of very different stakeholders, participant organizations are able to leverage their limited resources, achieve their core purpose and survive financially by achieving long term sustainability. Different stakeholder perspectives result in tensions and conflicts and these are resolved or simply held (Regnér, 2003;

Jarzabkowski, 2004; Kaiser and Overfield, 2010; Pache and Santos, 2013; Pircher, 2016; Dahlmann and Grosvold, 2017; Rey and Ricart, 2019) in pivotal places where key strategic processes coincide (research question 1; figure 12, section 5.3).

The strategic processes that have emerged within participant organizations are complex and often informal (research question 1; figure 12, section 5.3). The participants thought of and described strategic thinking and planning processes very differently; most importantly, they were different in scope (Mintzberg, 1994; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Moon, 2012) and underpinned by different ways of thinking (Mintzberg, 1994; Heracleous, 1998). Strategic thinking (often equated with the 'big' decisions, those that were linked to core purpose and values) was more embodied and relational by nature (mind, heart, body and spirit) whereas strategic planning was cognitive and analytical (rational, scientific and evidence-based). These core processes are loosely integrated by formal and, more often, informal processes and coordinating mechanisms (Mintzberg, 1980) (figure 13). The research participants believe that *both* sets of processes are critical to survival and to achieving organizational purpose. They are thus complementary (Mintzberg 1994, Heracleous, 1998):

Figure 13: Integrating Strategic Thinking and Planning Processes: Co-ordinating Mechanisms



Source: Researcher data analysis

The contribution that extended communities of interest make to participant organizations manifests in many small and unexpected ways; committed and highly dedicated staff who regularly go well beyond expectations, passionate volunteers, a shared sense of alignment that opens the door to project and partnership work with other organizations and individuals who provide their services at levels well below commercial rates. Many participants have small staff teams, many of whom are part time, and rely heavily on volunteering and membership. Even when the combined staff team is less than ten people, the

number of volunteers can amount to several hundred, matched by and sometimes exceeded by members:

“It’s about being active, it’s about being involved in something that’s bigger than yourself ... being part, contributing to something that’s bigger than yourself” (interview 3).

Underlying these contributions is a strong sense of shared values and purpose, not only relating to the natural world, but to wider, foundational, values that relate to people as well as nature, including equity, justice, fairness, compassion and empathy (chapter 4, section 4.16.5). For this reason the relationship with extended communities of interest might also be described as ‘circles of identity’. The estimated value of some of these services is published by the leading environmental charities (chapter 3, section 3.8.4) but these are only the most obvious contributions, those that can easily be valued at market rates. The contribution of the participant organizations often exceeds what can easily be valued and it is often hidden below the surface. The only way to see the full contribution is to dig deeply into the participant data (theme 7, section 4.9). One participant shared a quote from Chief Luther Standing Bear, which had significant meaning for him:

“Without nature the human heart becomes hard’ [*original quote, ‘we knew that man’s heart, away from nature, becomes hard’*] ... that, I think, is what I’ve been trying to get to the heart of. That’s, fundamentally, one of our aims is from the heart isn’t it, the connecting [*of*] people, improving wellbeing” (interview 26, researcher italics).

At the same time, participant organizations (mostly charities, social and community enterprises) often have low reserves and are very vulnerable to changes in funding or to an inappropriate mix of short and long term funding. This is exacerbated by minimum reserve rules for charities (and the nature of project-led funding, which is sometimes restricted, thus reducing unrestricted reserves). In short, participant organizations (particularly the smaller ones) are strongly focused on survival (chapter 4, section 4.10.4). The role of strategic planning is, however, broader than funding needs alone. Participants also see it in terms of ensuring efficient and effective resource allocation, an essential check on financial health, a key part in the process of prioritizing objectives and projects and operationalizing strategy (Heracleous, 1998). The ability to leverage their resources effectively is not an optional add-on for participating organizations, it is a *way of life*.

5.4.1 Contribution

The ability of participant organizations to leverage their limited resources is linked directly to the way in which the organizations manage different stakeholder needs and perspectives and is closely integrated into the overall strategic process, in particular, the relationship between the strategic thinking and planning processes and other key strategic processes (governance and consultative processes). The contribution of the second research question is thus closely linked to the first research question (section 5.3.1) although it has a more practical orientation. A simplified summary of the research contribution in relation to research question 2 is integrated into figure 11 (section 5.2).

The participants’ story is a valuable illustration of the way in which a purpose driven organization leverages its limited resources. This includes managing, resolving and holding the different needs,

perspectives and worldviews of different stakeholder groups, the relationship of this process to the strategic thinking and planning processes (including the formal, and often, informal coordinating processes that integrate them) and wider strategic processes including governance and the *specific* way in which the different languages or modalities are employed to communicate with different stakeholders in order to achieve the organization's purpose, financial survival and long term sustainability. Underpinning these broad areas are the specific insights that enable the participating organizations to do what they do, for example, the way in which they hold, rather than necessarily resolve, opposing and contradictory perspectives and worldviews. These contributions are important at a conceptual theoretical level, in terms of the praxis literature and for professional practice within the sector.

The individual themes also provide their own narrative and a wealth of detail on the practical day-to-day activities that underpin these broad processes. Theme 7 (extended communities of interest; chapter 4, section 4.9) and theme 8 (effective strategic planning; chapter 4, section 4.10) are key, although themes 6 to 9 are closely integrated as a whole (section 5.3.1).

5.5 Purpose driven organizations (RQ3)

Research question 3: How does a more relational approach to strategic thinking, based on a sense of connection, challenge our existing understanding of strategic thinking?

The connection to nature is of the utmost importance to participants. Throughout the research process, in all the data collection methods, they returned to this topic whenever they could. As a group they live and breathe their connection with the natural world and it is what binds them together. It is for this reason that the participants' story is best read from the bottom up. It is this connection, which ultimately drives the strategic processes. Much of the insight from the research study, from a praxis perspective, is found here. Participants expressed their thought and feelings passionately and sometimes emotionally. There were times when they were close to tears, sad and grieving, exasperated, frustrated and disillusioned and yet, as a group, they remained stubbornly hopeful:

"It sounds a bit pretentious to say it's my lifetime work ... but that's how I see it" (interview 10).

"You don't come [*here*] to earn lots of money. You come here to make a difference ... people do it because they're passionate about the environment. They actually want to make a difference" (interview 21).

Participants are deeply connected to nature, both as something beyond them and something deep within. They have a multiplicity of forms of connection to nature (perspectives) including 'hearts and minds' and a deeper, more holistic sense of connection. They also have a diversity of specific entry points into this relationship but they share a common experience of that connection process. Although participants resonated with nature in many diverse ways but they all felt a sense of wholeness, being a part of nature not apart from it, and they recognised the interconnectivity that permeates the natural world; that without 'them' there is no 'us'. Many talked of an inherent sense of oneness with nature (Kals, Schumacher and Montada, 1999; Clayton, 2003; Dutcher et al., 2007).

The participants' connection to nature is complex. It encompasses a full range of human sensibilities or intelligences (Gardner, 1993, 1995, 2003, 2011; Robinson, 2011) including mind (cognitive, mental, rational and analytical; Porter, 1991, 1996), body (intuition, gut feelings, the senses; Mintzberg 1994; Minocha and Stonehouse, 2007; Shapiro, 2011, 2019), heart (emotional, affective, relational; Goleman, 1996, 2004) and spirit (a deeper sense of knowing; Zohar and Marshall, 2001), and the life perspectives of participants, born from experience and professional training (ecological and scientific worldviews). Critically it also encompassed a shared *experiential* process of connection (Mayer and Frantz, 2004) that is *both* specific and universal (Rohr, 2016, 2018; Cameron, 2017), one that binds the participants strongly together. In short, it provides meaning and is part of their identity; "This is my way of life" (interview 25).

This strong connection with the natural world (Schultz, 2002; Bragg et al., 2003; Mayer and Frantz, 2004; Schultz et al., 2004) is intensely felt by the participants and includes a strong attachment to nature by and of itself (intrinsic) as well as recognising the benefits that it brings (extrinsic), most importantly, its role as humanity's life support system. The nature of connection is diverse and specific (personal) but it is also universal, shared and understood at a deeper level by the participant group as a whole (collective). It is thus deeply meaningful to the participants (expressed in terms such as 'we get it', 'the thing', 'the spark' and 'the trigger') and bonds them together, creating a strong sense of mutuality inside their workplaces and communities. It also makes them feel different (theme 1, we are outsiders) as their connection stands in sharp contrast with the belief in separation from nature widely shared in the outside world (Vining, Merrick and Price, 2008). This makes them passionate, committed and sometimes obsessive in what they do:

"Why do I do it? I don't know, because I can't do anything else, because I don't *want* to do anything else. I feel the benefits of what I do so why would I want to stop doing it? ... it's like a magnetic pole" (interview 24).

"I've never, until now, had a job where, and this is no joke, I wake up in the morning and I think, 'great, I've got to go into work'. And I love coming in, and I love being here and I love being in my job and it just makes me feel so happy and just lucky really. And that's the honest truth" (interview 25).

Participants do what they do because of their intense connection with nature. They also believe that environmental issues are complex, turbulent and uncertain (Neugebauer, Figge and Hahn, 2015) and that the world is in crisis, a deeper and more existential crisis than is widely perceived by the outside world, one which affects both the natural world *and* people. This taps into deeper values, which underpin a broader sense of connectedness, such as empathy, compassion, fairness, justice and support for others, especially the disenfranchised, the underdog. These foundational values were widely held within the participant group, who often talked in terms of moving the world, bit by bit, from separation to a state of connectedness:

"I want to be remembered for making a positive impact on wildlife worldwide ... part of what I do ... involves not just helping animals ... but also people ... it's all linked together, it can't be separated" (interview 29).

These strong foundational beliefs and experiences, focused on their connection to the natural world, bring participants together to make a difference in the world through shared values and collective

purpose (section 4.11.6) by reaching out and engaging others, including through partnerships, projects and other forms of collaboration. These deeply shared underlying values, beliefs and experience (Goldman and Casey, 2010; Schein, 2010; Mitroff, 2016) and a common sense of purpose and mission (Drucker, 1989; Collins and Porras, 1996, 2005; Stead and Stead, 2000; BoardSource, 2005; Beng Geok, 2018; Cardona, Rey and Craig, 2019) are the glue that binds them together internally and underpins their ability to engage with the outside world and create extended communities of interest (research question 2, section 5.4).

For participants this sense of aligned purpose and shared values is very rarely a theoretical construct, but instead one that is intensely practical and grounded. It brings together staff, volunteers, members and communities around a common sense of purpose, mission and goals, founded on a deeply shared values, and forms the basis of working collaboratively with others. It is this intensity of connection that underpins the relational and purpose driven nature of participant organizations and drives the strategic process (research question 1, section 5.3) and enables them to leverage their limited resources successfully (research question 2, section 5.4). Purpose, or mission, drives strategy rather than the other way around (Drucker 1989).

5.5.1 Contribution

The participants' story is a valuable illustration of an integrated relational model of strategy, which includes the key role that connection to the natural world plays in developing a shared sense of purpose that underpins, and drives, the strategic process in small and medium-sized environmental organizations. It contributes to the literature on purpose driven organizations and on connection to the natural world by providing a wealth of detail on the complexity that underlies these areas. It highlights the role that different sensibilities or intelligences (mind, heart, body and spirit or inner knowing) play within the participants' personal connection to the natural world and how a shared sense of the *experience* of the connection process binds them together in collective endeavour, which becomes the foundation for their purpose driven organizations. Participants are connected in diverse ways but share a common experience.

The participants' story is also underpinned by key insights into how this process works in *practice*, which includes the importance that participants place on intrinsic as well as extrinsic value, the role of specificity in the connection process, which brings a universal sense of meaning to the participants, the links to broader societal values that integrate nature and people (justice, equity, compassion, empathy) and the importance that being outsiders plays in forging the determination, commitment and drive of the participants. The broader societal values play an important role in binding the participants together in collective endeavour and underpinning the purpose driven organizations at a deeper level. These contributions are important at a conceptual and theoretical level, in terms of the praxis literature and for professional practice within the sector.

The individual themes that underpin research question 3 (themes 1 to 5, chapter 4, sections 4.12 to 4.16) also provide their own narrative and a wealth of detail on the practical day-to-day activities and

relationships that underpin the participants' relational model of strategy. Theme 1 (we are outsiders), themes 2 and 3 (connection to nature), theme 4 (what and why participants do what they do) and theme 5 (how they do it) *together* provide the relational foundation for the purpose driven nature of the participant organizations. However, they are also interconnected in more complex ways, often directly to the individual strategic themes (themes 1 to 9), for example, theme 7 (extended communities of interest) has its roots in themes 1 to 5.

5.6 Research limitations

The use of an inductive, ethnographic research methodology, supported by a multi-method triangulated research design allows the capture of rich, deep data that mirrors the complex and holistic quality of strategic thinking. This provides a solid methodological foundation for generating practical as well as theoretical insights, which other researchers may be able to build upon outside the context of this research study, thus mitigating the lack of generalisability inherent in inductive and case study research (chapter 3, section 3.7.3).

The research study is focused on small and medium-sized environmental organizations and the analytical story that has emerged is contextually bound. The environment sector is "poorly understood" and a "marginalized object of analysis" (Clifford et al., 2013, p.243) and there are no directly comparable research studies for comparative purposes. In addition, there is a paucity in the literature in many of the key areas highlighted by the research findings (the environmental sector, governance within small and medium sized organizations, strategic thinking in not-for-profit organizations, including purpose driven organizations and stakeholder management). As a result, it is appropriate to adopt a cautionary approach to the assessment of the research contribution both inside and outside the focus of research study.

Within the environmental sector, the rich, deep data makes a direct contribution to practitioners in the field (including some of the participant organizations, chapter 4, section 4.4) and to the praxis literature on strategic thinking (Goldman, Scott and Follman, 2015). The participants' story contains many important, and sometimes surprising, insights in relation to strategic thinking and the broader strategic processes that have emerged within the participant group. These may lead to the development of new theory as a result of further research in these specific areas.

5.7 Conclusions

The aim of the research was to explore the nature of strategic thinking from a broader and deeper perspective focusing on small and medium-sized environmental organizations and explore whether there is a link between the participants' connection with nature and the strategic thinking process. What has emerged from the participants' story is a deeply relational model of strategy, one which is full of surprises and unanticipated insights. The participant organizations' strategic processes have emerged from their deep desire to make a difference. This includes a different way of seeing the world, based on multiple sensibilities or intelligences but this is not the full story. What has emerged is deeply layered, interconnected and, above all, complex.

The participants' world that has opened up through the research process is paradoxical. It is relational, strongly purpose driven (often described as a mission), underpinned by deeply held values and accompanied by long-term visions, sometimes very long indeed. Yet participants can be intensely practical, focused on day-to-day activities and many confessed being happiest when engaging in simple, practical, connected tasks. They are capable of thinking big but paying a lot of attention to the detail. They have developed the capability to simultaneously use different modalities. They think, feel, sense, intuit, create and know their way to strategic decision-making, yet they value effective strategic planning and the key role that it plays. They have trained themselves to speak different languages to different stakeholders, who may hold contradictory views, yet they hold very strong views and consider themselves to be outsiders.

Most participants did not refer to strategic thinking by name but the process they described was fluid, often informal, and interconnected with other key strategic processes. Participants referred to a different way of thinking (Liedtka, 1998, Mintzberg, 1994), one that keeps the organization on track, linked back to its core purpose and deeply held belief systems, which is embedded, most often informally, within the organization's overall decision-making process. The language used by participants differs from standard academic terminology but the scope of the strategic thinking process they described did not (Heracleous, 1998; Liedtka, 1998; Bonn, 2001, 2005; Graetz, 2002; Goldman and Casey, 2010). In particular, the participants echo much of Mintzberg's process view of strategy and strategic thinking. The process is complex, often emergent, sometimes planned, sometimes not, with thought and action changing roles in their shifting interplay. It is holistic and systems-based but human elements are also important; intuition, creativity and commitment all have an important role to play (Mintzberg, 1987a, 1987b, 1994; Mintzberg et al., 1998).

There is, however, a difference. The strategic processes within participating organizations have emerged to ensure that organizations are able to meet their purpose, survive day-to-day and are sustainable in the long term. The ability to husband resources effectively, attract additional funding, ensure a place in policy discussions and communicate with those who hold resources and power, all of these require some form of effective strategic and financial planning. But it is strategic thinking, as a different, more holistic, way of thinking, that keeps them on track, keeps them 'on beam' with their core purpose and deeply held values. It was best recognised by its quality; a place where current decisions (strategic and sometimes operational) could be questioned and evaluated against a simple embodiment of the organization's purpose.

For the research participants it doesn't really matter what it is called. It is interconnected with the other key processes within the organization and it is intertwined with their practical and action orientation; the need to get things done. Participants did not always feel they succeeded in achieving the right balance. For some it was a constant struggle to make ends meet, resource limitations are often very real and the need to resolve or hold the opposing views of stakeholders has arisen from necessity rather than by design. However, when important decisions need to be made, it is to the 'fundamentals' to which they inevitably return.

5.7.1 Conceptual and practitioner pathways

The inductive, qualitative methodology enables the underlying participant storyline to emerge through ever increasing levels of abstraction but these are often best evidenced by citing individual participant data at a very specific level. The underlying data is deep and rich, often prosaic, but of great value in understanding how *each* participating organization manages the interconnected nature of the strategic decision-making process so that they can meet their purpose and survive financially. Individual participant organizations are also characterised by other factors including strong personalities (founders, executives and trustees), issues of power and control, cultural dynamics (for example, founder legacies) and a host of other factors that are experienced in organizations of very different structures, sizes and orientations. This complexity, like the organizations themselves, is best understood from the bottom up rather than the top down.

The rich, deep data has provided similarly rich findings, and these have important implications for theory development and for the practitioner in the field (figure 11, section 5.2). The specificity of the participants' story is, most immediately, of value to practitioners in the field of the study, small and medium sized environmental organizations. The inductive nature of the research study also positions it more closely to the praxis literature (Whittington, 1996; Regnér, 2003; Jarzabkowski, 2004; Goldman, Scott and Follman, 2015). This is reinforced by the paucity of literature in the research area; the environmental sector (Kendall and Knapp, 1996; Clifford et al., 2013), strategic thinking, governance, stakeholder management and the nature of purpose driven organizations in small and medium-sized not-for-profit organizations.

As a result, the research study makes a valuable contribution to the praxis literature in the field, particularly in areas such as the nature of strategic thinking in the sector, its relationship with strategic planning, the impact of purpose driven organizations on strategic thinking and the role of governance and other key factors and insights. It helps to build a bridge between conceptual understanding and empirical observation. The participants' analytical story suggests that whilst strategic thinking is not formally recognised or labelled, it is deeply embedded within the participants' organizations at those points where key decisions need to be evaluated against core purpose and/or the expression of that core purpose in terms of mission, vision, underlying values and proxies such as principles, guidelines and the 'fundamentals' that were often referred to by participants as the organizational ethos and remit.

5.7.2 Implications

The research findings have important implications for theory development, managerial practice and for policy that extend beyond its immediate contribution. The study helps to open up new research opportunities to look further at the framework underlying the participants' analytical story, and the individual components and insights within, and explore whether they can be applied elsewhere to enhance the literature within these multiple areas, providing a good base for future theory development. For managers and practitioners, individual insights and the holistic framework for strategic decision-making process adopted by participant organizations may fruitfully be applied to day-to-day decision-

making where appropriate. In some areas, for example, the participants' ability to leverage limited resources, there may be important policy implications for funders and other bodies that work with small and medium-sized not-for-profit organizations, particularly within the environmental sector.

The combination of the deep and rich participants' story *in association with* the diverse literature in the field (fragmented in parts and supplemented where necessary outside the core strategic and organizational literature) provides a wealth of insight for future research across multiple areas, including strategic thinking, purpose driven organizations, governance, stakeholder management and the nature of our relationship with the natural world.

The key implications of the research study are found both within the overall framework for decision-making within the participant organizations (purpose and deeply held values precede and drive strategy, but both strategic thinking and planning processes are critical to *achieve* purpose and sustainability) and at the level of individual insights. The complex nature of the process of participant connection to the natural world (the more embodied nature of that process, the importance of intrinsic as well as extrinsic value, the specific yet universal experience of that connection) plays a crucial role in providing the foundation for the purpose driven nature of the participant organizations. The shared sense of this *process* of experience, specific yet universal, provides the normative glue that underpins the purpose and deeply held values of participant organizations and the ability to come together to make a difference in the first place.

At this level there are implications for the strategic process (including its relationship with extended communities of interest) collaborative working, funding and in the governance process. In addition, however, there are less obvious yet potentially significant insights. The research study suggests, for example, that the relational foundation of participant organizations is often broader and deeper than the nature-based organizational purpose would suggest, and more universal values, such as justice, compassion, equity and fairness, play a key role in binding the organizations together, both internally and externally. This is a key finding for practitioners and may make a valuable contribution to the literature, and potentially to policy, if the finding is replicated elsewhere.

Above all, the research study provides a clear example of a relational model of strategy, but one which has evolved complex processes to combine multiple thinking modalities that enable participant organizations to speak different languages to different stakeholders and manage the tensions and conflicts between their often opposing objectives, perspectives and worldviews, sometimes by *holding* rather than necessarily resolving these tensions. This ability, discussed within fragmented strands within the literature, plays a fundamental role in enabling the organizations to leverage their limited resources. This may have profound implications (funding, resources, collaborative working and policy), particularly if further research is able to replicate this finding elsewhere.

The participants' story paints a picture of a complex and holistic process that is focused on the big picture, which in the case of participants, is to achieve their core purpose and to make a difference in the world that is aligned to their strong values and beliefs. It also mirrors the complexity of the natural world,

the interconnectedness of all things. That is satisfying as it suggests that the internal strategic thinking process is aligned to the nature of the external environment. Aldo Leopold (1887-1948; one of the father figures of ecology and conservation) put it much better nearly a century ago:

“The last word in ignorance is the man who says of an animal or plant, ‘What good is it?’ If the land mechanism as a whole is good, then every part is good, whether we understand it or not. If the biota, in the course of aeons, has built something we like but do not understand, then who but a fool would discard seemingly useless parts? To keep every cog and wheel is the first precaution of intelligent tinkering” (Aldo Leopold, published posthumously, 1953).

It is a lesson we have still yet to learn.

5.8 Personal reflection

It is a common practice to say that becoming a researcher is a learning process and for me it certainly was. It was not linear, it often seemed as if every step forward was accompanied by a couple of steps backwards but, thankfully, it was generally the other way around. I learned much about inductive research, the iterative process (sometimes intentionally, sometimes not) and about the enormous value of typing out each transcript myself. Those transcripts became my best friends and the analytical story emerged out of the constant interplay between them and the coding process. I also learned the essential lesson in holding that thin line between establishing the trust that allows participants to speak openly and freely, yet maintaining an appropriate boundary and a level of professional detachment.

Finally, the research process was a lesson in humility. I took me beyond what I thought I knew and it surprised me. At times it was stressful and frustrating, but when I look at what has emerged I am quietly amazed. It is my hope that in some small way this thesis will help us learn the lesson that Aldo Leopold so clearly elucidated so many years ago.

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BANGOR BUSINESS SCHOOL

The Value of Connection to Nature: Strategic Thinking in Environmental Organizations

APPENDICES



Penrhyn Gardens, Gwynedd

Appendix A: Individual Interview Template

INTRODUCTION (5 minutes)	
Personal introduction	Thank you for taking part; Brief personal overview of research objectives and questions.
Interview process	Style, relaxed, open, semi-structured and qualitative; Structure, 60 minutes, recorded (with permission), 5 minutes notice from end; There are no 'right' or 'wrong' answers; Confidentiality and data safeguards and follow up.
Personal information	Name, position, age (discretionary).
Organizational information	Formal name, legal structure, approximate annual income/revenue.
Hygiene factors	Comfort needs, any questions, ready to begin?
CORE INTERVIEW (60 minutes)	
MAIN QUESTIONS	ADDITIONAL QUESTIONS (probing, clarifying, going deeper) if appropriate
Icebreaker – Describe yourself in three words	
1 - Why did you agree to participate in this research?	<p>Why is this research important to you?</p> <p>What expectations or desired outcomes do you have, if any?</p>
2 - What is the story of your organization?	<p>What brought you to your organization? Or, why did you found your organization?</p> <p>What is unique about your organization?</p> <p>How does this contribute to its success?</p> <p>What stories are shared or celebrated within the organization?</p> <p>How are these stories shared?</p> <p>What makes you proud to work for, or have founded your organization?</p> <p>Where do you hope that your organization will be in five years?</p>
3 - What does it mean to you to be connected to the natural world?	<p>What is connection with the natural world?</p> <p>Why does it matter?</p> <p>What are the key elements or different components of this sense of connection for you and/or for others within your organization?</p> <p>Why is it important to you and/or your organization and in what ways is it manifested?</p> <p>How does this relate to your personal story, your journey and/or that of your organization?</p> <p>How does it relate to the success of your organization?</p>
4 - How are decisions made in your organization?	<p>What is the key purpose of decision-making in your organization?</p> <p>What factors are considered in this process?</p> <p>How do you make decisions? What kind of process do you go through?</p> <p>Can you provide some practical examples of the above, either at personal or organizational level?</p> <p>How is the decision-making process in your organization structured?</p> <p>Who is involved and what key factors influence them?</p>
5 - How does a sense of connection with the natural world impact on your daily working life and decision-making within your organization?	<p>What difference, if any, does a sense of connection to the natural world make to decision-making?</p> <p>In what ways, if any, is it recognized formally?</p> <p>In what other ways, if any, does it influence decision-making in less formal ways?</p> <p>How does this differ at different levels of decision-making within the organization?</p> <p>In what ways, if any, is this sense of connection shared and/or celebrated within the organization?</p> <p>Can you give examples of the above?</p>
6 - Is there anything else that is important to you, which we have not discussed as yet?	An opportunity for the participant to discuss matters that are important to them, but have not been covered by the 'formal' questions above.
Finishing Up	5-minute notice; Summarize key points of the interview; Any further questions?
END (5 minutes)	Thank you for participating; Permission to contact again; Workshop (preliminary location, timing and structure); Summary of research results (including likely timing).

Appendix B: Group Interview Template

INTRODUCTION (5 minutes)	
Introduction	Role of group interview within the research process and within the structure of the workshop as a whole.
Interview process	Style - relaxed, open, semi-structured and qualitative; Structure - 90 minutes after introduction, recorded (with permission), 5 minutes notice from end; There are no 'right' or 'wrong' answers; Confidentiality and data safeguards; Follow up.
Personal information	Confirmation of name, position, age (discretionary) of all participants.
Hygiene factors	Comfort needs, any questions, ready to begin?
CORE INTERVIEW (90 minutes)	
INDICATIVE QUESTIONS	ADDITIONAL QUESTIONS (probing, clarifying, going deeper) if appropriate
Icebreaker – Describe the work that you do in three words	
1 - How would you describe to somebody who knows nothing about you why you choose to do what you do?	<p>What are your key influences in life?</p> <p>Who are your heroes and/or heroines?</p> <p>What events have shaped the person you are and the work that you have chosen?</p> <p>Who has inspired you this morning?</p>
2 - What do you feel you share in common?	<p>Which stories from other participants resonate with you or contain aspects of your own narrative?</p> <p>What shared experiences do you feel you have as a group?</p> <p>In what ways is your organizational decision-making similar to, or different from, other participants?</p> <p>What common issues, challenges and problems do you face as a group and what are the similarities in how you are choosing to resolve them?</p>
3 - Which themes that emerged this morning impacted you the most?	<p>Which themes had the most impact on you? Why was that?</p> <p>What themes were the most prevalent and why do you think this is the case?</p> <p>What, if anything is missing?</p> <p>What surprised you?</p> <p>How are you/your organization addressing these themes?</p> <p>What will you take away with you from today?</p>
4 - How would you define success for yourself and for your organization?	<p>What are your hopes, aspirations and dreams for yourself and for your organization?</p> <p>What would success look like?</p> <p>What difference would you most like to make in this world?</p> <p>What are the critical success factors for environmental organizations today?</p> <p>Where do you hope that your organization will be in 5 years' time?</p>
5 - Why does a connection with nature matter in your work and how does it impact on your organization and on you personally?	<p>What is a connection with nature?</p> <p>How is it shared and/or celebrated within your organization?</p> <p>How is it integrated into the decision-making processes within your organization?</p> <p>What, if anything, makes your organization different from others within or outside the sector?</p> <p>In what ways does a sense of connection enhance or detract from making your organization successful?</p> <p>How does this connection manifest in day-to-day working life?</p> <p>What practical examples can you give that evidence why a connection is important?</p>
6 - Is there anything else that is important to you, which we have not discussed as yet?	<p>What is it about a sense of connection that makes a difference?</p> <p>How does this impact the way in which your organization functions?</p> <p>What is the ONE thing that will make the most difference to your chances of success?</p>
Finishing Up	5-minute notice; Summarize key points of the interview. Anything further to add or further questions?
END (5 minutes)	Thank you for participating; Permission to contact again in the event of further questions or clarification; Next steps and summary of research results (including likely timing).

Appendix C: Participant Feedback on Preliminary Findings (Theme 10)

Title	This means everything to us
Subtitle [<i>Brief overall description of coding material</i>]	Key themes, insights and patterns of preliminary findings meetings [<i>screen shots of coding groups in Appendix A</i>]
Broad category	Feedback on preliminary findings (selective participant meetings representing three key workshop events in Wales, Scotland and England).
Date	October 3 rd 2019
Coding groups [<i>and descriptors</i>]	<p>We are practical people [<i>We do stuff and are using the research in practical ways</i>].</p> <p>We leverage resources through connection [<i>The value of connectivity through networks, collaborative working and partnerships (extended communities of interest)</i>].</p> <p>This means everything to us [<i>We are different, passionate and committed and connected through intrinsic as well as extrinsic value, through inner knowing (embodied through heart, body and spirit) as well as cognitive understanding (through the mind)</i>].</p> <p>Truth tellers – we suffer, we communicate from the coal face [<i>We see environmental changes first, we suffer from this knowledge and it drives us harder to do what we do</i>].</p> <p>Two strands of the strategic process [<i>Environmental organisations have both cognitive/rational and more embodied strands in their strategic process</i>].</p> <p>Personalities and leadership, power and control [<i>Other human facets of the management process</i>].</p> <p>Governance is critical [<i>The importance of the governance process in holding and reconciling tensions and conflicts</i>].</p>
Sub-codes within groups [<i>and descriptors</i>]	None
Colour code	Brown

Appendix D: Workshop Itinerary and Agenda (Example)

PhD Research: Bangor University: Connectivity With Nature and Strategic Thinking

Workshop Event: Friday 1st December 2017 at Treborth Botanic Gardens

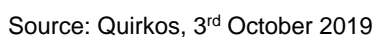


Penrhyn Gardens, Gwynedd

Itinerary/Agenda for the day

- 9.30** Arrival (tea and coffee)
- 10.00** Welcome, objectives and research summary
- 10.10** Getting to know each other (two brief exercises)
- 10.30** Making a difference: visions, challenges and issues (exchanging stories)
[Including 15-20 minutes for coffee mid-way]
- 11.45** Brief overview of afternoon activities
- 12.00** Lunch (modest catered lunch) and Reflection: Exploring the gardens
- 13.00** Group interview – recorded semi-structured debate
- 14.15** Questions, feedback and formal wrap-up (10 minutes)
- 14.25** *Those who need to leave early at this point are welcome to do so*
Or: Tea and coffee
- 15.00** The research going forward: A brief summary of (some) findings to date
- 16.00** Close

3 – Grouped codes after 2nd cycle review (incorporating feedback data, separately coded)

[illegible]

Source: Quirkos Coding Software, June 30th 2019

Appendix F: Analytical Memo Template (Example)

Analytical Memo 1	
Title	We are outsiders
Subtitle [Brief overall description of coding material]	We are different, passionate, committed and value driven by a strong moral duty of care [screen shots of coding groups in Appendix A]
Broad category	'Who are we?'
Date	July 24 th 2019
Coding groups [and descriptors]	<p>We are different [We are odd, different and we see things differently]</p> <p>Passionate: Highly motivated and committed [We carry the torch - we are passionate about what we do and why we do it]</p> <p>Moral duty of care – We are values driven [Our values are at the core of what we do - we seek meaning]</p>
Sub-codes within groups [and descriptors]	<p>We are different</p> <p>We are odd [We are odd, obsessive, different - sometimes I feel like I live on an alternative planet]</p> <p>We do things our own way [We are independently thinking and act in our own way, true to our beliefs]</p> <p>Why me? [I do not fully understand why I have a sense of connection with nature that is not shared by others]</p> <p>Struggle to be understood or noticed [Others do not 'get' what is fundamental to us so we cloak it a language they understand]. Also includes the sub-codes, Powerlessness [We are disempowered: We're all 'pissing into the wind'] and Preaching to the converted [We preach only to the converted: our world is at a crossroads, that most people cannot or will not see]</p> <p>We speak different languages to different people [Different language between communities of interest who 'get it' and those on the 'outside']</p> <p>Passionate: Highly motivated and committed</p> <p>Angry, frustrated and suffering [Angry and frustrated (or suffering, in pain and/or grief)] by what people are doing to our world and our inability to effect change]</p> <p>Moral duty of care – We are values-driven</p> <p>All beings matter [All people and creatures should be valued and given equal dignity and respect]</p> <p>Responsibility as stewards [Taking 'ownership' and responsibility as stewards, guardians or custodians of the natural world and we take responsibility]</p> <p>Right thing to do [Because it's the right thing to do. We have a moral and ethical perspective/imperative on nature]</p> <p>Justice, fairness and equity ['A sense of moral duty' both for people, nature and together]. Also includes the sub-codes, Support the underdog [Looking after those who are disenfranchised; physically, socially or economically] and Kindness, compassion and empathy [Kindness, compassion and empathy are a large part of what we do]</p> <p>We offer hope not fear [We are careful to communicate hope not fear and are ambitious about how we reach our objectives]</p> <p>Scientists at heart [Our identity as scientists is important to use and scientific principles guide us through our lives and careers] Also includes the sub-code, Evidence based conservation and practice [Conservation backed by evidence and scientific methods]</p> <p>We seek meaning and identity [We seek meaning in our lives - Our work is part of who we are]</p>
Colour code	Orange/Yellow

Appendix G: Definitions of Strategic Terms Used by Participants

The definitions of common strategic terms below are included for reference purposes, primarily for comparison with participant understanding of the terms. Not all terms have commonly agreed definitions or interpretation of their meaning. Indeed, participants used different definitions, some of which were contradictory. Few participants defined either strategic thinking or purpose driven organizations, both of which are discussed extensively in the main body of the text.

1.1 Vision

A vision statement is a picture of where the organization aspires to be in the future (Kenny, 2014) and it usually long-term. This differentiates it from an aim (section 1.5), which is broad but achievable. This vision encourages the organization to go beyond the current focus on day-to-day activities and strategies with a clear, compelling and memorable statement of what *could* be possible in the future (Kenny, 2014, researcher's italics) or *where* the organization would ideally like to be if it achieves its mission (section 1.4). This is as much a picture or image of that desirable future as a set of words. For some writers, this pictorial element is too close to a dream image and/or personal vision. Hamel and Prahalad, for example, use the term 'foresight' meaning a clear and compelling view of the future, which has a more external emphasis (Hamel and Prahalad, 1994).

1.2 Mission

A mission statement is a description of the essence of an organization. For a commercial organization this will include what business it is in and what the boundaries of that endeavour are (what it does and what it does not do). By its nature a mission it is not time bound and it is intended to focus an organization on its core reason for being (Kenny, 2014). For small and medium-sized environmental organizations a mission is very closely connected with their purpose and it is usually expressed in the long term. If mission is *why* an organization exists, vision often describes *where* it will be when it achieves its mission or at some place on the way to achieving its mission.

This begs a question, what is the difference between purpose and mission? There is no common consensus in the literature (they are both essentially expressions of why the organization exists) and there is a good deal of overlap between the terms. Some academics have suggested ways of differentiating the terms, for example, the idea that a purpose statement has a deeper emphasis on the customer or client perspective than a mission:

"Putting managers and employees *in customers' shoes*. It says, 'This is what we're doing for *someone else*'. And it's motivational, because it connects with the heart as well as the head" (Kenny, 2014, italics in the original, accessed online).

However, these arguments are not very convincing. The difference probably lies in context; purpose is more commonly used in everyday language and mission has, traditionally at least, been the preferred term in the academic literature.

1.3 Aim(s) and objectives

For commonly used words, there is a surprising amount of confusion between aim(s) and objectives. A useful definition, given its simplicity, is that the aim (and it is usually singular) is *what* is seeking to be achieved, whilst the objectives (and it is usually plural) is *how* this is going to be achieved (Thomson, 2014). The aim will be broad, achievable (within the realms of possibility) thus distinguishing it from a vision and mission, which are aspirational. The objectives set out the steps that need to be taken in order to achieve the aim and are thus necessarily more precise (Thomson, 2014).

In reality, those participant organizations that used the terminology, aim(s), which were a small minority, did not always interpret the terms in accordance with the definitions above. For example, one participant organization (interviews 20 to 26) has two main aims, which are then subdivided into objectives, one relates to supporting nature and the other is concerned with helping people through nature.

1.4 Fundamentals and (first) principles

Fundamental is defined as "forming the base, from which everything else develops", or something that is "more important than anything else." (Cambridge English Dictionary, 2020). A principle is defined as a

“basic idea or rule that explains or controls how something happens or works” and a first principle is “the basic and most important reasons for doing or believing something.” (Cambridge English Dictionary, 2020) or, alternatively, a principle is “a fundamental truth or proposition that serves as the foundation for a system of belief or behaviour or for a chain of reasoning” and a first principle is “the fundamental concepts or assumptions on which a theory, system, or method is based” (Google Dictionary, 2020). Note that word “foundation” in this definition, something on which everything else rests, which is a good summary of how participants used the term the term ‘fundamentals’ in the research process.

1.5 Remit

A remit is the “the types of activity that a person or organization has responsibility for.” (Cambridge English Dictionary, 2020). As such it is closely aligned to purpose, albeit more practically oriented in action.

1.6 Ethos

An ethos is the “characteristic spirit of a culture, era, or community as manifested in its attitudes and aspirations.” (Google Dictionary, 2020). As such it is closely aligned to the definition of mission above as the essence of an organization.

1.7 Connection to nature

Nature refers to “the phenomena of the physical world collectively, including plants, animals, the landscape, and other features and products of the earth.” (Google Dictionary, 2020). Although people often feel a part of nature (Vining et al., 2008) many common definitions assume that human beings and nature are separate:

“The phenomena of the physical world collectively, including plants, animals, the landscape, and other features and products of the earth, as opposed to humans or human creations” (Google Dictionary, 2020).

“The animals, plants, rocks, etc. in the world and all the features, forces, and processes that happen or exist independently of people, such as the weather, the sea, mountains, the production of young animals or plants, and growth” (Cambridge English Dictionary, 2020).

Sources: Dictionary definitions

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Appendix H: Research Participant Analysis

1.1 Sample size and composition and participant recruitment

In the majority of cases there was one participant for each participating organization (25). Four organizations fielded more than one person. This is summarised in figure H1:

Figure H1: Spread of Participants Across Organizations

	Number of Organizations	Total Participants
Single participants	25	25
2 participants	2	4
3 participants	1	3
6 participants	1	6
Total	29	38

Source: Participant data provided during individual interviews.

1.2 Participant selection process

The 38 participants, from 29 organizations, were drawn from small and medium-sized environmental organizations in Wales, Scotland and England, reflecting a broad range of organizational objectives including conservation and protection of the natural world, campaigning and advocacy, animal and people welfare (enhancing the lives of people through a connection with the natural world), in line with the definition of an environmental organization in chapter 3, section 3.8.2. Participating organizations covered all aspects of nature including landscape, flora, fauna and related areas (for example, a geopark, field centre, botanic garden and zoo) and were selected from organizations categorized as either 'environmental' or 'animal welfare' as both activities support the natural world.

The objective was to ensure a diversity of participants by selecting a broad range of organizations in terms of purpose, size, organizational structure, geographic location, role, age and gender (figures H1 to H6 below). Data was collected during the individual interviews and, when participants had not attended an initial interview, at the group workshop events.

1.3 Purpose

The core purpose of participant organizations was diverse covering all aspects of the natural world. The majority (20 out of 29) were engaged in nature protection and conservation but this is a very broad classification and incorporates nature reserves (ecological and wildlife habitats), a botanic garden, a friends society supporting a National Park and a zoo, as well as a wide variety of elements of the natural world including flora, fauna, landscape and a practitioner of natural agriculture. Other key areas included animal welfare (3), communication, advocacy and campaigning (2) and visitor centres, education and a field centre (4).

The classification is simplistic because all the participant organizations (including the smallest) had multiple remits within the context of an overriding purpose. In addition, for the larger participant organizations the expression of core purpose in a practical context is increasingly people-focused as well as nature focused (the ability to heal and transform people's lives *through* nature) and this is frequently expressed in their vision, mission and purpose statements. A summary of the core purpose of participant organizations is included in figure H2:

Figure H2: Summary of Participant Organizations' Principal Purpose (Focus)

Core purpose (focus)	Number of Organizations (Conservation/Restoration)	Number of Organizations
Nature conservation and restoration: <i>Of which:</i>		20
<i>of which</i> Nature reserves, wildlife habitat & ecology, flora & fauna)	12	
Botanic gardens, parks and zoos	4	
Landscape and land management (<i>Note 2</i>)	4	
Animal welfare		3
Communication, advocacy and campaigning		2
Education, training and Visitor Centres		4
Total		29

Source: participant data provided during individual interviews.

Note 1: Principal focus; participant organizations had multiple remits within the context of an overriding purpose.

Note 2: Category includes natural agriculture (one participant).

1.4 Size

The research focuses on small and medium-sized organizations with an annual income up to some £5 million. Only one participant organization had an income over £2.5 million (£4.3 million in 2018). This organization viewed itself as a leader in its field (with a significant profile within its county) but did not regard itself as large in national terms; 'we're a big fish in a small pond' as one participant observed at the group interview. The research group includes a small number 'micro' organizations, those with an income less than £10,000 (3).

The analysis of participant organization income was collected from participants during the 18-month interview process and is indicative as it was provided from memory and different organizations used different years as the basis for their estimate. It was reviewed and sense-checked to online annual reports where appropriate (for example, the timing of large legacies can significantly distort charitable income on a year-on-year basis). This is summarised in figure H3:

Figure H3: Summary of Participant Organization Income

Annual Income (2017 – 2019)	Number of Organizations
Income up to £10,000 (note 1)	6
Over £10,000 to £100,000	4
Over £100,000 to £1 million	9
Over £1 million to £2 million	8
Over £2 million to £4.3 million (highest income)	2
Total	29

Source: Participant data provided during individual interviews (based on accounting periods 2017-2019), sense-checked against online annual returns where significant fluctuations might occur year-on-year.

Note 1: One participant (government-based) had no relevant organizational income.

1.5 Organizational structure

Participants were drawn from a broad church of organizational structures, primarily charities and social and community enterprises (27 out of the 29 participating organizations, which included two hybrid organizations) all of which have a strong focus on supporting the natural world. None of the participants operated within a profit driven remit. For those organizations that contained a commercial dimension, the profits of that dimension were reinvested back into the concern. In addition, two participant organizations have alternative structures, one a landed estate with a very strong environmental ethos and the second a senior government official (who had previously had a substantial environmental remit). This is summarised in figure H4 :

Figure H4: Summary of Participant Organizational Structures

Type of structure	Number of Organizations
Charities	21
Social and community enterprises	4
Hybrid structures (partly charitable)	2
Family business (landed estate)	1
Government-based	1
Total	29

Source: Participant data provided during individual interviews.

1.6 Geographic locations

Research participants were located throughout the United Kingdom with an equal representation from Wales (9), Scotland (10) and England (10). One participant, who was based and interviewed in Scotland is classified as such even though the organization also has an office in London. Participating organizations selected were based throughout the regions, from Wiltshire in the South to Inverness in the North and from Anglesey in the West to Peterborough in the East.

1.7 Participant roles and involvement in the strategic process

Participants were selected on the basis of having a degree of involvement within the strategic decision-making process of their organizations but this was defined broadly in terms of *influence* to ensure that there was a full representation of participants from all levels of the participating organizations and to capture those in informal as well as formal leadership positions (Gardner and Laskin, 2011). Those in positions of formal power and authority represented the majority of participants (24 out of 29), with five participants each from the managerial and project-based categories. There were also three owner/proprietors from smaller organizations.

The senior nature of the participant group reflects not only the strategic decision-making criteria but also the willingness and interest of senior executives to engage in the research. Often the researcher engaged with staff below this level and an invitation to participate was referred upline to a senior executive, often a senior Board member, the CEO, Founder or Chairperson. In smaller organizations it was natural to direct the request straight to the person 'in charge'. A full analysis of participant roles is summarized in figure H5:

Figure H5: Summary of Participants' Organizational Roles

Primary role	Number of participants (Executive team)	Number of participants (Sub-totals)
Executive team: Chief Executives, Founders, Directors, General Managers & other Board members		24
<i>of which: Chief Executives</i>	6	
<i>Founders (Note 1)</i>	5	
<i>Chairpersons (Note 1)</i>	3	
<i>Other Directors, General Managers etc.</i>	10	
Managers: Line managers, departmental, section & function heads		5
Project leaders: Project-based responsibility and authority, reporting to others		5
Owner-proprietors: Small organizations & landed estate		3
Other: Government-based		1
Total		38

Source: Participant data provided during individual interviews. In certain cases participants have changed roles and/or departed from the organizations since the interviews were conducted.

Note 1: Founders were also most often in a CEO role. Chairpersons were in smaller organizations but also operated at CEO or General Manager level.

1.8 Age and gender

The research group included a broad mix of age groups and was fairly evenly divided between male and female participants. The comparative absence of any participants in the 18-25 age group and the significant number of men over 65 (5) reflects the criteria to select participants with some degree of involvement in strategic decision-making. The youngest participant was 25 (female) and the oldest was 77 (male). A summary of the participant age and gender is included in figure H6:

Figure H6: Summary of Participant Age and Gender

Age Range	Male	Female	Total
18-25	-	1	1
26-40	3	5	8
41-55	9	5	14
56-65	5	5	10
65+	5	-	5
Total	22	16	38

Source: participant data provided during individual interviews.

Appendix I: Research Participant Forms

Participant Invitation Letter

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College of Business, Law, Education and Social Sciences, Bangor University

Hen Goleg, Prifysgol Bangor
Hen Goleg, Bangor University

Gwynedd LL57 2DG
Ffon/Tel: (01248) 383879
Elusen Gofrestrig Rhif/Registered charity 1141565



January 2017

Dear

Re: The Value of Connectivity: How and Why Connection Enhances the Ability of Small and Medium-Size Environmental Organizations Supporting the Natural World to Think Strategically

We are writing to invite you to take part in a research project assessing the role that connectivity plays in small and medium-size environmental organizations in shaping the way that they think strategically. The research is being carried out by Mr. Robert Gorzynski, a PhD student at Bangor Business School, Bangor University, as part of his doctoral thesis under the supervision of Dr. Azhdar Karami and Dr. Siwan Mitchelmore. An information sheet about the project is enclosed to this letter.

Robert Gorzynski is sending you this letter and information sheet to invite you to take part in this study. This would involve an interview at your workplace (or an alternative location that is convenient to you) and attendance at a one day workshop on strategic thinking within environmental organizations, which will include the researcher taking memo notes during the morning session and a group interview in the afternoon (*see participant information sheet for more detailed information*). Any information you share would be treated as **strictly confidential** – you **would not** be identified in any reports or outputs arising from this work.

Your participation is very important and essential for the success of this research project. If you decide that you would like to take part, please complete the consent form and the questionnaire and return it to Robert Gorzynski at Bangor University using the freepost envelope. You do not need to use a stamp.

If you have any questions or would like to know more about this work, please contact Robert Gorzynski by email (abp746@bangor.ac.uk).

We would like to take the opportunity to thank you in advance for your participation in this research. We look forward to hearing from you.

Yours faithfully,

Robert Gorzynski
Researcher
Bangor Business School
Bangor University
College Road, Bangor
LL57 2DG

Dr. Azhdar Karami
Supervisor
Senior Lecturer in Strategy and Management
Bangor Business School
Bangor University
College Road, Bangor
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Appendix I: Research Participant Forms

Participant Information Sheet (1 of 2)

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PARTICIPANT INFORMATION SHEET

The Value of Connectivity: How and Why Connection Enhances the Ability of Small and Medium-Size Environmental Organizations Supporting the Natural World to Think Strategically

Introduction:

You are being invited to take part in a research project entitled "How and Why Connection Enhances the Ability of Small and Medium-Size Environmental Organizations Supporting the Natural World to Think Strategically". Before you decide whether or not to participate in this study, it is important for you to understand why the project is being done and what it will involve. Please read the following information and discuss it with colleagues and/or with the senior executive within your organization if you wish.

What is the purpose of the study?

The overall purpose of this research is to assess the role that connectivity plays in small and medium-size environmental organizations in shaping the way that they think strategically. This is important not only in practical matters such as funding, advocacy, campaigning, building and maintaining profile, shared resource allocation and project management but also in establishing a fundamental shared sense of purpose (mission, vision, values) that underpins sustainability in all senses of the word. Specifically, this research seeks to answer the following questions:

1. How and why does a sense of connection with the natural world contribute to the ability of small and medium-size environmental organizations to think strategically?
2. How does this sense of connection contribute to the organizations' ability to achieve key strategic and operational objectives with limited resources?
3. What contribution does this research make to the theoretical body of knowledge on strategic thinking?

Why have I been chosen?

You have either met the researcher at an environmental event or your organization fulfils the research selection criteria. Participants are being drawn from small and medium-size environmental organizations within the United Kingdom. Although organizations will have a diverse range of structures (for example, charities, social enterprises, proprietary concerns) they are aligned through a strong sense of social purpose focused on supporting the natural world (both environmental and animal welfare). All participants have an influence on, or are involved within, the strategic decision making process within their organization.

Do I have to take part?

It is up to you to decide whether or not to take part. If you decide to take part you should contact the researcher at Bangor University by completing the consent form and returning it in the freepost envelope provided. **If you are willing** please **also** complete the consent form for recording the interviews and enclose it in the envelope. Please remember to keep this information sheet.

What will happen if I decide to take part?

Initially you will be interviewed individually within your workplace (or an alternative location that is convenient to you). The interview will take approximately 70 minutes (60 minutes for the core interview and 5 minutes each for introduction and wrap up sessions). If you have given your permission the interview will be recorded. Alternatively, the researcher will take written notes at the interview.

Appendix I: Research Participant Forms

Participant Information Sheet (2 of 2)

You will then be invited to take part in a one-day workshop on strategic thinking within environmental organizations as one of 8 to 12 participants. The research workshops will be designed to allow participants to forge new relationships and learn from each other (on both practical and strategic matters) as well as a place in which to share their experiences and stories. The researcher will play a purely facilitative role and conduct two further research activities during the day. Firstly he will observe the morning's activities and take memo notes where appropriate. Secondly, the researcher will conduct a group interview in the afternoon lasting some 90 minutes. This will be recorded with the consent of all participants or the researcher will take notes during the process. **All information that is shared with the researcher during the day will be confidential.** All interviews will be conducted in English.

Will my taking part in this study be kept confidential?

Yes. Your contact details will be stored on a **confidential** database. The information you share will be treated in **confidence**. You **will not** be identified in any reports or publications.

Data storage

All data collected (both electronic and physical) will remain confidential and stored safely. Data with personal details (consent forms, individual and group interviews and participant observation) will be saved securely as follows:

- Electronic - On secure servers at Bangor University, which are password protected.
- Physical - in a locked cupboard in a secure location with access strictly limited to the researcher and other key individuals involved in the research process.

As the research is being conducted off campus, all devices used will be password-protected and data will be transferred as quickly as possible to secure university servers. Copies of signed paper documents will also be stored securely in a university location. Recording devices used for individual and group interviews will be erased securely as soon as information has been transcribed and coded and is no longer needed for research. For additional security the individual names of participants will **not** be used in recorded sessions and transcription documents. Instead, the researcher will code all research data using a 14-character system for research identification processes.

What will happen if I don't want to carry on with the study?

You are free to withdraw from the study at any time without giving a reason. If you decide to withdraw, your decision **will not** affect any services or support that you may receive.

What will happen to the results of the study?

The findings from this study will be the subject of academic analysis and inform a doctoral thesis which will be submitted towards a PhD degree at Bangor University. The findings may be published in academic journals and presented at national and international conferences.

Who is organising and funding the research?

The project is being organized and self-funded by the researcher as a part of the requirements of a doctoral degree.

What happens if I have any concerns about this project?

If you are concerned about any aspect of this project and would like to speak to someone please contact Dr. **Azhdar Karami**, Project Supervisor, by email (a.karami@bangor.ac.uk) or by telephone on 01248 388 350.

Contact for further information:

If you would like more information, please contact **Robert Gorzynski** by email (abp746@bangor.ac.uk).

Next steps:

If you decide that you would like to take part, please complete and return the enclosed **consent form and consent to record form** to Bangor University in the freepost envelope provided. You do not need to use a stamp.

Thank you for kindly taking the time to read this information.

Appendix I: Research Participant Forms (Consent Forms - Interview and Recording)

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PARTICIPANT CONSENT TO INTERVIEW FORM

The Value of Connectivity: How and Why Connection Enhances the Ability of Small and Medium-Size Environmental Organizations Supporting the Natural World to Think Strategically

Please tick the boxes that apply to you.

I confirm that I have read and understand the information sheet for this study ☐

I understand that my participation is voluntary and that I am free to withdraw at any time without giving a reason ☐

I understand that my details will be stored on a **confidential database** ☐

I understand that all information I provide will be treated as **strictly confidential and will be used** for the stated purpose ☐

Name: _____

Address: _____

Post code: _____

Telephone number: _____

Signature: _____

Date: _____

**Please return this form in the freepost envelope provided.
Thank you.**

Coleg Busnes, y Gyfraith, Addysg a Gwyddorau Cymdeithas, Prifysgol Bangor
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PARTICIPANT CONSENT TO RECORD RESEARCH INTERVIEW

The Value of Connectivity: How and Why Connection Enhances the Ability of Small and Medium-Size Environmental Organizations Supporting the Natural World to Think Strategically

To be completed prior to interview.

Please tick the boxes that apply to you.

I agree for this research interview to be recorded and for the recording to be used for the purposes that have been explained to me. ☐

I understand that all the information I provide will be treated as strictly confidential. ☐

Name: _____

Signature: _____

Date: _____

Interviewer signature: _____