Sensemaking to Define Organizational Values and Assess Organizational Performance

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Dedication

To the memory of my mother, Dr. Evelyn Davis, who always supported me in my academic pursuits, and who was right to occasionally remind me, “you can always become a doctor.” Your spirit was with me on this path.

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Many individuals deserve thanks for guiding me and encouraging me over the length of this Capstone Project. To you, I will be eternally grateful.

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To my professors for always challenging me to think differently, to try a "provisional self", to add one more visualization, to be "rightfully indignant" in the face of injustice, and to find two more (or four fewer) articles. Thank you.

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Lastly, to my dog. Your unwavering devotion to those you love is a model we all should strive to achieve. Thank you.

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Executive Summary

Jewish Middle School of Nashville (JMS) is a young micro school operating in a competitive independent school market in Nashville, TN. Founded in 2015 initially as a school serving to extend Jewish education into adolescence, it has evolved into a small school with a large purpose: to provide excellent Jewish education to the city's Jewish families and to provide excellent education to adolescents of all backgrounds and beliefs. While the school has evolved rapidly over the past few years, quadrupling their student body and hiring new faculty, they have also evolved their governing body by doubling their Board of Directors and have experienced pitfalls like faculty attrition, COVID-19, and relocation to a different facility to allow for social distancing. These factors may have clouded over the values that the organization states that it espouses. A misalignment of values could be a cause of conflict as JMS continues to develop.

This capstone project sought to uncover the core values at JMS that underlie both daily operations at the classroom faculty level and longer-term perceptions of values and behaviors at the Board and administration level. Based on the literature on organizational and school climate and culture, values statements, sensemaking, and organizational performance measures, I chose two theoretical frameworks to guide data collection and subsequent data analysis. The first framework is Sensemaking (Weick, 1995) to create an understanding of events and cues from an organization's past and present. The second framework is from Denison and Mishra's (1995) theory of organizational effectiveness. This framework is based on organizational culture and identifies organizational traits related to

organizational performance. From these I developed the following project questions to address through surveys, interviews, and document analysis:

1) What core values are important to different stakeholder groups at JMS?
    a. Who are the stakeholder groups?
    b. Do core values differ across stakeholder groups?
2) How does JMS currently measure organizational performance?

Through a mixed methods study design comprised of two quantitative surveys to the two major stakeholder groups of classroom faculty and Board/administration, three qualitative interviews with classroom faculty, and a document analysis of mission/vision-related Board-level documents, I uncovered the following four findings:

1) The following values are either stated or implied as having importance to the stakeholders of the organization: collaboration/cooperation, communication, community/community building, humility, inclusivity/involvement, independence/autonomy, Jewish values, and relationship building.
2) Stakeholder groups have a high level of involvement in the organization.
3) The underlying values are similar across stakeholder groups, except for perceptions of organizational consistency, adaptability, and mission. Here, the data indicates a discrepancy among members of the Board/admin about organizational mission, and

the Board/admin believes less strongly than the faculty that the organization is adaptable.

4) JMS assesses organizational performance through more contemporary, community-centered measures in addition to traditional input-output measures.

Based on the findings from the project questions and data analysis, I recommend that JMS employ the following three improvements:

- Clearly differentiate between the espoused Jewish values and universal community values to promote the dual mission of the school. Revisit the values list periodically as the organization develops.
- Create a parent/family council to assess new programming recommendations and their relationship to JMS's core values.
- Include clear values measures at the student, faculty, and organization-wide level in organizational performance measures.

This capstone project operated during COVID-19 and has limitations based on the uniqueness of the organization. However, insights discovered during the values-definition process may be useful for JMS for some time as the organization undergoes an accreditation process.

Introduction

This capstone project is a partnership with Jewish Middle School of Nashville (JMS) a young, religiously-affiliated independent school that has evolved significantly since its inception in 2015. Located in the suburbs of Nashville, TN, JMS's history dates back over a decade of wishing and planning by prominent members of the city's Jewish community (Rabbi Saul Strosberg, personal communication). The leader of this planning has been the school's founder and co-head of school, Rabbi Saul Strosberg.

The organization has evolved due to both external and internal factors. The first evolution was the organization's purpose. Members of the Jewish community in Nashville regretted an absence of Jewish education during adolescence, since the city's local Jewish independent school, Akiva, ends in 6th grade (Rabbi Saul Strosberg, personal communication). So, what started as a singular wish to extend Jewish education into grades 7-9 has evolved into a dual-mission middle school serving students of all background in grades 5-8 and continuing Jewish education into adolescence.

When asked in an early interview about the school's purpose and mission, Rabbi Strosberg declared it still in the developmental stage. The founder's words often include visionary language. An example description by Rabbi Strosberg of the evolving mission and purpose includes, "we're halfway there, our mission. We seek to serve the best and the brightest Jewish families and to also be a model for all middle school kids" (Rabbi Saul Strosberg, personal communication). Their model stands out as a unique education offering in the city in many ways. As a significant differentiator in a diluted independent school market, JMS stands alone as solely a middle school, the sole Jewish education offering for

adolescents in Middle Tennessee, and the sole micro school in Nashville openly promoting a values-based education model.

The organization's second evolution was that of its pedagogy and programming. Initially, JMS offered a blended learning environment for grades 7-9 by hosting both in-person and virtual learning opportunities in partnership with Metro Nashville Public Schools "Virtual School" program. This served JMS's small, inaugural class of six students, but the organization decided that model and grade range was not a good long-term fit for attracting and retaining students. JMS then began moving to an in-person grades 5-8 model, as 5th grade is a transition year between elementary and middle schools in Metro Nashville Public Schools, thus it is an entry year for many Nashville independent schools. By its third year, JMS offered solely in-person classes on campus in West Nashville and promoted itself as an affordable independent school educating the whole adolescent child. In addition to moving from blended-learning to all in-person learning, JMS added a part-time student option, further differentiating itself from other local independent schools. Offering part-time learning opportunities for homeschool families or families with alternative schooling needs helps include more diverse families and students to the JMS community.

The third evolution was in governance and finances. Between the spring of 2020 when I began talking with Rabbi Strosberg and the end of that summer, the organization doubled the size of its Board of Directors to eighteen individuals. Also during this time, the organization secured a significant donor to bolster finances and continue to keep tuition lower than other independent schools in the city.

The organization's fourth and final evolution has been in its student body, staffing, and premises. Due to COVID-19 and social-distancing guidelines, JMS had to move from its original location in West Nashville to Rabbi Strosberg's synagogue and reinstate a blended-education model to facilitate virtual learning for when remote learning would be mandatory. This offered more space for health reasons and it allowed JMS to meet in-person, but it did disrupt the establishment of routine in the school's history. In the summer of 2020, JMS hired two new faculty members and more than doubled the student body from around a dozen students to over thirty. Then, in the winter of 2021 during this capstone project data collection phase, the organization suffered the departure of one educator integral to daily operations. This required repurposing personnel to different roles.

The Organization's Problem

These recent changes in size, location, staffing, and governance may have clouded over what core values drive both the short-term, daily operations and long-term goals of the school. As a young micro school, JMS operates in an ever-expanding independent school market in Nashville and must compete for families and students with larger, more traditional schools. In its short history, its success is due not only to serving the local Jewish community via providing Jewish education, but also through creating an inclusive environment through enrolling students with diverse religious backgrounds and learning needs. However, standing out in a diluted market requires clear communication of organizational uniqueness and offerings to ensure healthy enrollment. There are dozens of independent schools in Nashville all seeking to tap into the growing diversity of the city, so for JMS to reach a goal of fulfilling both its missions of providing excellent Jewish education and a rich learning

experience for adolescents of all backgrounds and beliefs, it will need to be able to clearly express its core beliefs and how they differ from competitors.

Since organizations strive to be effective, and the number of independent schools in Nashville has grown rapidly in the past two decades, JMS wishes to promote its niche and attract the right families who will add to the community and benefit from values-based education.

Purpose of the Capstone

The purpose of this capstone project is to identify the underlying, espoused core values of different stakeholder groups in the organization. Through uncovering values exhibited in day-to-day operations and in long-term goalsetting activities, consistencies might be found that the organization can use internally and externally. Discrepancies between stakeholder groups on core values can provide the organization with areas of growth. Also, as a values-based organization, identifying core values espoused by the stakeholder groups of the organization can help determine not only how effective it is at delivering on its intended purposes, but also help guide the future direction of the organization as it continues to evolve and grow in a saturated independent school market.

Why it is Important to the Organization

As a values-based organization centered around educating the whole child and catering to both Jewish and non-Jewish families in Nashville, there are a lot of potential sets of conflicting values that could cause conflict and disagreements in the organization as it develops. In addition, recent significant changes in organizational structure, size, and governance mean that “mission drift” is a real possibility that could steer the organization

off course. As an organization that at its core wishes to promote Jewish values and honor the values of other members of its community, it is imperative that JMS has a clearly defined set that it can use to promote itself, steer its course, and utilize as a tool for daily operations like curriculum design and student management.

Context of the Organization

What the Organization Does

JMS provides values-based education for adolescents from all religious backgrounds, but its primary purpose is to continue Jewish education through adolescence for Jewish families in Nashville. While it promotes diversity and inclusivity through statements published on its website, the school's current size of thirty-two students and three full-time faculty restricts its community in regards to diversity of culture, thought, and experience.

JMS fills a niche in the local independent school market, which is both a strength and a weakness for the future of the organization. According to the member organization Independent Schools of the Nashville Area (ISNA), there are thirty-four other independent schools in the city and surrounding area. The breakdown of which grades are served by which school is shown in **Figure 1:** ISNA local school populations by grade ranges.

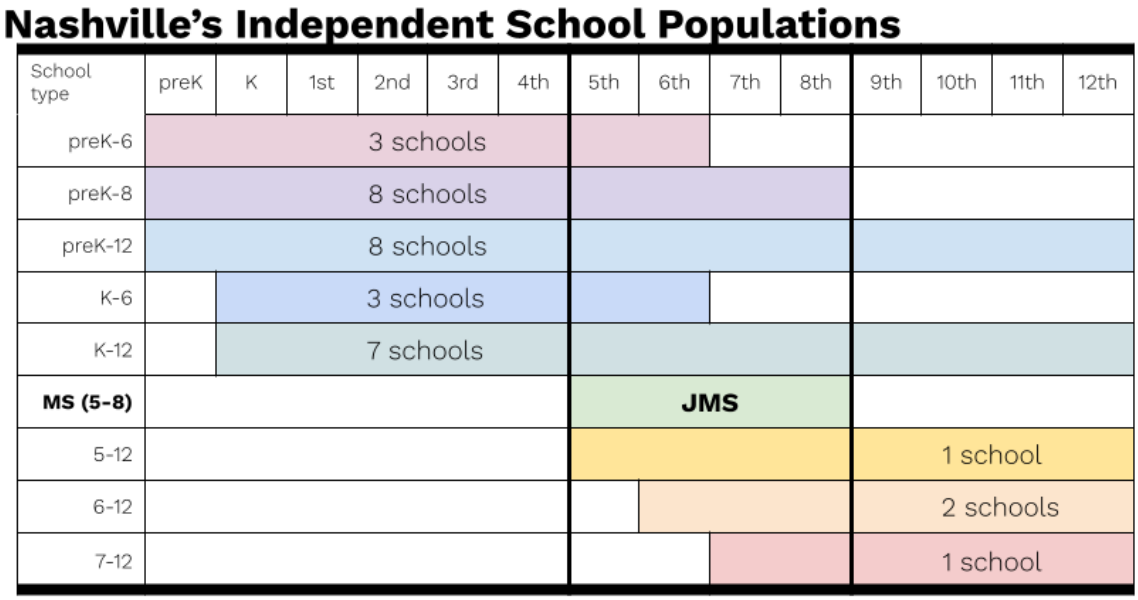


Figure 1: ISNA local school populations by grade ranges

With 100% of the city's independent schools serving at least some of the middle-level grades (6th-8th), JMS has a lot of competition for families seeking traditional independent schools for children in this grade range. However, it is only independent school in the city specifically tailored towards teaching just adolescents in the middle level grades, as most other independent schools which contain a middle school are either preK-12 or are middle schools attached to either high schools or extensions of elementary schools.

Who JMS Serves and Who it Employs

Students and families. JMS serves a small community of families with different religious backgrounds and educational goals. The majority of JMS families are Jewish, approximately 50%, and attend JMS as an extension of Jewish education at the elementary level. During the 2020-2021 academic year, the student body included 32 students, up from twelve the previous school year. Among these students, around one-half are only children,

so the social aspect of school is important to families (Rabbi Saul Strosberg, personal communication). To serve many different families' needs, whether they be educational, social-emotional, religious, or otherwise, JMS employs a structure novel to Nashville in that there are both full-time and part-time students. The full-time students follow a more traditional structure of separate classes throughout the day taught by different instructors, and this schedule includes social- and emotional-learning opportunities through courses taught by experienced instructors in religion, sociology, and philosophy. Part-time students may come to campus or join remotely for specific courses like mathematics, writing, or social studies and are often joining for socialization, homeschooling curriculum supplementation, or for other specific academic support needs. Approximately 20% of the student body attends part-time, and this is an offering that JMS intends to develop further in the future (Rabbi Saul Strosberg, personal communication). This program allows for student to enter during the year at any time for Jewish education programming and social-emotional programming, and this further differentiates JMS in the Nashville independent school market.

Employees. JMS is a small employer and is differentiated as a relatively flat organization compared to traditional, highly-structured independent schools in the city. JMS currently employs around one dozen individuals in total, which includes full-time and part-time staff. These employees encompass the Jewish education courses, academic core classes, office staff, and those who assist students with learning needs in the classroom. Traditional independent schools are hierarchical with one head of school, individual division or department heads, and teaching faculty and support personnel spread widely at the same

functional level. Around these are traditional superstructures of business offices, advancement offices, and technology support. JMS, as a micro school, operates under a different structure that was described by one employee as being flat but effective. Its structure is flat due to its small size and its use of role-sharing. Full-time faculty have decision-making abilities regarding daily operations, curriculum, and programming. The co-heads of school perform classroom observations and occasionally co-teach with the other full-time faculty for supervision. No formal observation mechanism currently exists but teachers frequently consult with the co-heads for guidance on student management, lesson planning, parent communication, and more when necessary.

As for the teaching faculty who interact with the part-time and full-time students daily, JMS employs the smallest number of full-time teachers of any of the local ISNA schools. At the beginning of the 2020-2021 school year when I began discussions with JMS about data collection, the organization employed three full-time teaching faculty, two of whom were also co-heads of school, plus one full-time teaching assistant. The teaching assistant and one of the full-time faculty members were recent college graduates, and JMS was their first full-time employer. Both of the co-heads were veteran teachers with decades of experience both in the classroom and in administration at previous schools. However, in early 2021, one important member of the organization left for an employment opportunity at another organization, and this required major changes at JMS in a short period of time. JMS adapted immediately, promoting the full-time teaching assistant to the vacant full-time classroom faculty position. Also, this required reorganizing leadership roles as this individual who departed was also one of the co-heads. Rabbi Strosberg again took on the role of one

of the co-heads of school and normalcy was reestablished in a short period of time. This did have an impact on the school's climate and culture, and details of this emerged during this Capstone project.

Stakeholders of the Capstone project. This project employed direct contact with two major stakeholder groups, faculty and administration, and through the Sensemaking process the project indirectly identified two additional stakeholder groups during qualitative interviews. These two additional, indirectly analyzed groups are JMS parents and JMS students. Together, these four stakeholder groups provided rich information into the daily operations of the school and into the future planning of the organization.

Problem of Practice

JMS is an organization that was recently conceived, has continually developed at a rapid pace, and has adapted to both internal and external forces that may have clouded over the core values which underlie its daily activities and long-term goals. Beyond its recent inception in 2015, JMS has withstood frequent faculty change, administrational restructuring, and a global pandemic with the onset of COVID-19 in the spring of 2020. These occurrences all have had an impact on how daily operations are carried out and what the organization is able to plan for the future. To help establish itself as an institution in the Nashville independent school market, JMS wishes to uncover what core values are important to different stakeholder groups not only to understand itself in a clearer way, but also to be able to communicate these values to prospective families and students.

One way JMS is seeking to do this is through solidified values statements that can clearly communicate these underlying core values in the organization. Values statements are public projections of an organizations' purpose and values (Daniel & Blount, 1992; David, 1989; Driori, & Landau, 2011; Moore, 2000), and these statements are now ubiquitous in contemporary for-profit and non-profit organizations (NPOs). As NPOs, including schools, continually progress towards business-like management and seek to promote themselves in competitive markets, it is natural to use the mission statement as the first line of strategic planning (Hopkins, Stringfield, Harris, Stoll, & Mackay, 2014) and as a tool aligning programming with organizational values. A drawback of many values statements, such as mission statements and vision statements, is the density of complex concepts contained within (Cady, Wheeler, DeWolf, & Brodke, 2011) that are difficult to measure and are not used in organizational performance measures. With many subjective values and claims asserted in mission and vision statements, many schools struggle with staying consistent with aligning practice with mission (Cho, Hamilton, & Tuthill, 2019).

JMS has published values statements on its website and on promotional materials, but as the school has developed radically in just a few years, it is important to the school that it understand how the organization's values are developing and which underlying values exist in the daily actions of its members and activities. These may differ from what values were stated as the organization took shape upon its inception.

Literature Review Guiding the Capstone Project

From Organizational Climate to Organizational Values

Organizational climate to school climate. Research on school climate originated in organizational climate research in the 20th century (Anderson, 1982; Van Houtte, 2005). In a survey of organizational studies on climate and culture, Denison (1996) defines organizational climate as "aspects of the social environment that are consciously perceived by organizational members" (p. 624). Schulte, Ostroff, Schmulyian and Kinicki (2009) agree stating that organizational climate is an "abstraction of the environment" (p. 618), emphasizing that members within an organization actively construct their understanding of the climate through social interactions and through participating with the organization's policies and practices. School climate, then, is the set of perceptions that organizational members have about their environment, yet this environment is the specialized setting of a school (Anderson, 1982). This level of inquiry in a school setting is important for understanding what the faculty and staff perceive of the policies, social environment, and traditions in the workplace.

Organizational culture to school culture. According to Denison (1996), the culture within an organization is the "deep structure…which is rooted in the values, beliefs, and assumptions by organizational members" (p. 624). Schein (1985) labels assumptions as the primary, root level of how an organization relates itself to its environment. Assumptions are the unquestioned beliefs that build the core of the organization (Schein, 1985). Other researchers echo these constructs of organizational culture and add additional points of inquiry like unquestioned organizational norms (Anderson, 1982; MacNeil, Prater, & Busch,

2009) and the arc of an organization's evolution over time (Denison, 1996). In the case of Schein's (1985) classification of cultural levels, part of organizational culture also includes specific artifacts and practices that the organization exhibits. Identifying what the artifacts and practices are within the organization is shining a light on its underlying culture and what it values as worthy of perpetuating or in what direction the organization is evolving.

School culture, then, is the set of assumptions, norms, values, and beliefs that organizational members hold in the specialized setting of a school (Anderson, 1982; MacNeil, Prater, & Busch, 2009). School culture research evolved through sociological, psychological, and anthropological lenses (Daniel & Blount, 1992; Schein, 1985) to focus on the symbolic elements at play within a school (Wren, 1999). These symbolic elements of a school are the meanings behind the practices, rituals, and policies. Tagiuri (1968, as cited in Anderson, 1982) located school culture as a subset of school climate, creating a theoretical link connecting the two concepts. Shann (1999) showed a similar theoretical connection specifically between school culture and school climate, stating the organization's culture manipulates its climate. This means that underlying assumptions and beliefs impact the perceptions faculty and staff have about the school environment and practices. This point of view is critical for developing a methodology for measuring the values in a school since a school's culture manifests itself outwardly as its climate (Schein, 1985).

What is important to this improvement project is that both climate and culture are rooted in values (Denison, 1996), even though there is confusion in the literature about the two terms of school climate and school culture (Anderson, 1982; Denison, 1996; MacNeil, Prater, & Busch, 2009; Van Houtte, 2005). Independent schools capitalize on aspects of their

culture that differentiate them from competitor schools to attract families, but without an understanding of the values organizational members hold, it is difficult to link school effectiveness measures to values-based educational goals. Furthermore, if different stakeholder groups within the school hold different core values as important, conflict will arise. This type of conflict is inevitable, and it should be proactively managed through clarification of purpose and vision and through clear lines of communication between stakeholder groups.

Hyper-focused school culture: micro schools. Micro schools are a relatively new phenomenon in the United States education landscape, and they exist to solve problems that their organizers have identified in the current educational offerings in their contexts. Micro schools usually contain fewer than 100 students and may operate as one-room schoolhouses (Horn, 2015) with multi-age groupings, or they may operate more traditionally with separated ages and classes but "unorthodox settings" (Cohen, 2017) such as technology labs, commercial spaces, or individuals' homes. They often focus around a central theme or value set, and the culture is tightly focused on community. Among the problems with modern independent schooling that they aim to solve include the unaffordability of large, traditional independent schools, traditional education's growing irrelevance to technology-centered society, society's movement away from structured systems, and traditional education's slow pace of growth and diversity (Cohen, 2017; Horn, 2015).

Many micro schools provide informal educational opportunities such as makerspace-centered activities (Tan, Jamaludin, & Hung, 2019) and problem-based learning (Cohen, 2017), both forms of informal learning systems that augment formal, core-curriculum classes

such as language arts, mathematics, and science. Many popular, technology- and problem-based micro schools are in high fashion in certain education markets such as in Silicon Valley, Austin, and New York City, and the names of these schools are becoming more familiar in popular media. Some example boutique micro schools include the Kahn School (of Kahn Academy origin) and NuVu. While micro schools offer something different from traditional schools, it is not clear whether they are offering something better for everyone. A major indicator of this is the lack of research on micro schools and their effectiveness. There are no peer-reviewed articles researching the long-term effects of micro school culture on organizational effectiveness or student outcomes. This is due in part to the novelty of micro schools and the short period of time in which they have been popular in the United States since the 2000s (Cohen, 2017; Horn, 2015).

While micro schools do serve a purpose and an audience, they are vulnerable to change, underscoring their hyper-focused school cultures and their tight operation. A staffing change of two individuals in a large school has much less impact than the same staffing change in a micro school, for example. Also, a dip in enrollment at a large school can be offset by endowment funding or additional fundraising, whereas a dip in enrollment at a micro school can cause financial ruin.

Assessing Organizational Values Using Mixed Methods

As mentioned above, school culture is the set of values that are taken for granted and go unquestioned, however, identifying school culture is the critical first step in many school improvement theories (Hopkins, Stringfield, Harris, Stoll, & Mackay, 2014). Culture

can manipulate school climate because school practices and policies will either align with or differ from an organizational member's values.

What is important methodologically is that measuring the values organizational members espouse at the school should be done both quantitatively and qualitatively. Denison (1996) summed organizational climate research as quantitative and organizational culture research as qualitative. School climate assessments, for example, are often surveys that question organizational members about their perceptions of what is going on in a school but they often fail to uncover underlying values (Maslowski, 2006; Schoen & Teddlie, 2008). Researchers should combine surveys with qualitative measures of school practices to uncover values in organizational members' actions (Van Rekom, Van Reil, & Wierenga, 2006). Since schools are complex social systems involving numerous stakeholders each with his or her own assumptions, expectations, and interpretations of behaviors, norms, and rituals (Fidan & Balci, 2017), school culture can be difficult to measure quantitatively. Qualitative methods, however, can create narratives of the organization and document its evolution and uncover the assumptions and beliefs that organizational members hold (Meyer, 1995).

Organizational Performance and School Effectiveness

School effectiveness research originated in the mid-20th century as researchers began to study organizational performance (Hopkins, Stringfield, Harris, Stoll, & Mackay, 2014; Van Houtte, 2005). A model of assessing or viewing organizational performance that dominated the last century was the input-output model (Anderson, 1982; Van Houtte, 2005). This model ties organizational output measures such as financial performance or student

achievement scores to some measurable input such as marketing dollars or teacher experience through a linear relationship (Anderson, 1982).

School effectiveness in independent schools requires more measurements than academic achievement alone, as the success of modern independent schools relies heavily on tuition dollars from supporting families. Attracting those families to the school takes more than traditional output measures like academic achievement as families gravitate towards programs promoting social and emotional learning (SEL), project-based learning, collaboration (Cohen, 2017; Horn, 2015). In the latter part of the 20th century, however, school effectiveness research evolved to investigate other factors such as organizational culture (Van Houtte, 2005). Researchers such as Main (2009) and Schoen and Teddlie (2008) found that school effectiveness has ties with school culture, stating that effective schools embrace change through their culture accepting and promote the change as part of its values.

Research in school effectiveness mirrors this move towards focusing more on social development as equal in importance to student output performance. Recent studies investigating the relationship of student achievement to pro-social behaviors (Estelle, Farmer, Cairns, & Cairns, 2002; Shann, 1999; Wentzel, 1991), motivation (Ahmed, Minnaert, Van der Werf, & Kuyper, 2008), peer acceptance or perceived social value (Galván, Spatzier, & Juvonen, 2011; Oberle & Schonert-Reichl, 2012), problem-solving (Wentzel, 1991), and social competence (Rabiner, Goodwin, & Dodge, 2016) show an evolution from the view of schools as sites of simply academic achievement towards a view of schools as sites with a wide range of achievement outcomes. Recent school reforms target social aspects of

organizational performance at the building-level versus district-level unit of analysis (Anderson, 1982; MacNeil, Prater, & Busch, 2009), emphasizing that it is important to look within the school at its culture and its social interactions to find areas for improvement, as output measures like end-of-year student achievement or financial performance miss important mediating factors of organizational performance. This view of reforms targeting social interactions and for improving organizational members', including students', experiences in the school environment calls for questioning the values at play in the organization. Despite these reform movements and legislation, however, the predominant measures of school effectiveness remain traditional measurements of school effectiveness such as academic achievement, safety, student growth-over-time, and accountability to standards (Zvoch & Stevens, 2008).

Sensemaking as Theory and Process

Sensemaking is the act of creating a narrative of a situation through a retrospective analysis of that situation (Weick, 1995). Sensemaking intends to explain through the narrative process *what happened* in a situation so that an individual or organization as a whole may understand *why something happened* in a situation. While sensemaking is often employed by individuals or an organization to understand crisis situations (Weick, 1993; Weick, 1995), it is a universal theory useful for analyzing anything from the context of a decision or situation to an evolution of a whole organization over time. Sensemaking relies on plausibility, meaning that the created narrative of a situation attempts to explain what *may* have contributed to the outcome (Weick, 1995; Weick, Sutcliffe, & Obstfeld, 2005). In this way, Weick, Sutcliffe, and Obstfeld (2005) summarize sensemaking as "the ongoing

retrospective development of plausible images that rationalize what people are doing" (p. 409).

Sensemaking in the literature means something different depending on the industry, the data, and the intended use of the constructed understanding of what happened in an organization. Starbuck and Milliken (1988, as cited in Weick, 1995) consider sensemaking as a theoretical framework for understanding perceived stimuli. Others consider sensemaking the name of the process itself of using information to create a narrative of what happened, and it has developed into a research methodology to study information through communication (Dervin, 1999; Weick, 1995; Weick, Sutcliffe, & Obstfeld, 2005). A consensus in the literature about sensemaking as a methodology is that individuals perceive and experience various stimuli in some context, for example during a house fire, and in turn they create multiple interpretations of what actually occurred, like someone noticed an acrid smell just before the fire started, and in retrospect they understand it to have been an electrical fire.

Sensemaking as a methodology, the creation of rationalizations by looking at past events or stimuli, can apply to types of information along a continuum from trying to understand raw data in computing (Pirolli & Russel, 2011), to the role emotions play in decision-making in organizations (Dougherty & Drumheller, 2006), to whole social situations and their lasting effects (Dervin, 1999; Weick, 1995) like elections, sporting events, wars, or stock market crashes. Because concepts such as culture, school culture, values, and organizational performance have multiple interpretations, sensemaking will be a valuable

qualitative research methodology to gather and assess different stakeholder perceptions of core values at JMS.

Values Statements and their Role in Organizational Performance

School culture is fundamentally about the values adopted by the school and its organizational members, and values statements have become the standard medium through which organizations express those values to the community. While values statements are public projections of an organization's purpose and values (Daniel & Blount, 1992; David, 1989; Driori, & Landau, 2011; Moore, 2000), there is no consensus in the literature as to how and why a company develops, uses, and measures a mission statement. This variety in opinion of the purpose and use of values statements shows the difficulty in studying them.

Further complicating the study of values statements and an organization's alignment with them, is that there are multiple categories of values within any organization. In the broadest categorization, there are values that originate from the organization and are projected outwards, and then values individuals interpret as employees of the organization (Allison, 2019). Either of those two broad categories may have different meanings at different points in an organization's development. In an analysis of 611 values statements across multiple industries and firm sizes to better define and categorize organization values, Allison (2019) identified four specific categories of values, or values sets. For clarity, I name them *espoused historical, espoused actual, management perceived,* and *external image* (See **Figure 2:** Four Categories of Organizational Values).

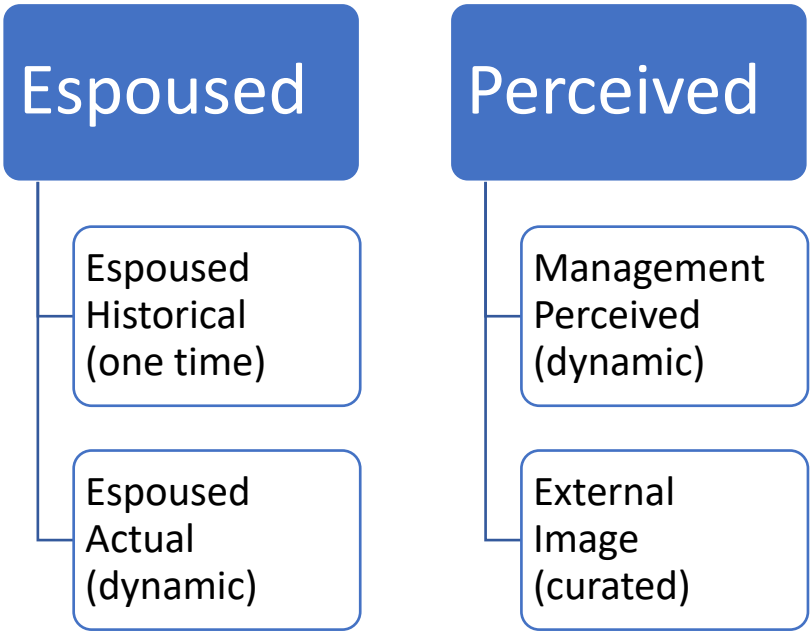


Figure 2: Four categories of organizational values (Allison, 2019)

The first category is the *espoused historical* values set which the firm identifies when creating the values statement. Those are the organization's stated values at that specific point in time, and these immediately begin to undergo change over time as the organization develops (Allison, 2019). This leads to the second values category, *espoused actual*, which is the set of values that underlie the day-to-day operations. The third values set, *management perceived*, is the manipulation or reinterpretation by management in an organization for a specific purpose, for example creating consensus around a value like "commitment" by demonstrating persistence or completing a task.

The final values category is *external image* and that is the values set the organization curates and projects to external stakeholders to position itself relative to its context. Allison (2019) describes the purpose of this final set as "a reaction to social issues to ensure the firm

is positioned socially to have a particular stance" (p. 668). Organizations communicate this fourth set through digital media outlets such as websites, Twitter, Facebook, and Instagram, and through traditional print media such as publications like flyers, magazines, and advertisements. All of the above four categories are open to interpretation, but Allison (2019) stated that the greater the alignment of the four categories, the greater a firm will be able to have "positive organizational effects" (p. 668) such as employee motivate, organizational effectiveness, and employee perception of the organization.

Values statements go by many names, the most common title being "mission" (Cady, Wheeler, DeWolf, & Brodke, 2011). Many values statements are densely packed with concepts, and many companies have more than one values statement (Cady, Wheeler, DeWolf, & Brodke, 2011). Organizations create these values statements in different stages of their development, and they include non-administrative stakeholders at various degrees. Alegre, Berbegal-Mirabent, and Guerrero (2019) studied two different methods of mission creation, a mission formulation strategy and a content strategy. After assessing performance according to mission, they showed that organizations that develop a mission through practice and reflection, and through gathering input from multiple stakeholders (mission-formulation), will have stronger mission statements than organizations that created one before the organization's founding and use it for guidance over time (content strategy). David (1989) concluded that merely the process of creating a mission statement may be more valuable than the product.

The process being more valuable than the product has implications for whom is involved in the mission-statement creation process. Most members of an organization have

no role in creating the meaning behind the mission statement, leading to a disconnect between organizational vision and performance of mission-centered tasks (Alegre, Berbegal-Mirabent, & Guerrero, 2019; Babnik, Breznik, Dermol, & Sirca, 2014; Mas-Machuca, & Marimon, 2019).

The consensus in the literature is that organizations create values statements for multiple purposes. After surveying 20 empirical studies of mission statement research, Desmidt, Prinzie, and Decramer (2011) identified that mission statements are commonly established for four purposes: providing organizational direction and purpose, resource allocation, communicating with internal and external stakeholders, and naming and describing core organizational values. Other researchers add more purposes for values statements, such as creating organizational climate, and promotion or deterrence based on adherence to values (David, 1989). There is also disagreement in the literature as to whether a mission statement directly leads to increased organizational performance. David (1989) concluded that there is no direct link between a comprehensive mission statement and organizational performance. On the contrary, Desmidt, Prinzie, and Decramer (2011) concluded that there are five ways to assess whether a mission statement impacts performance. Even when values statements contain measurable concepts, they may not align with the standards in an industry or organization. Wilkerson and Evans (2018) noted few common key words between standards and mission statements, showing that programs aligned with mission statements may not be following appropriate guidelines.

Frameworks for the Project

Sensemaking as a Theoretical Framework and Methodology

This capstone project utilizes two theoretical frameworks, the first is methodological and the second analytical. I used Weick's framework for sensemaking in organizations (1995) to create a narrative of Jewish Middle School of Nashville's organizational culture that informed the Introduction, Methods, and Findings section of this project paper. Weick's framework includes seven aspects for identifying the reality of the organization.

- **Identity construction** – sensemaking involves the creation of an identity, in this case "creating" JMS's identity as a school and what they perceive their school culture to be
- **Retrospection** – sensemaking looks back to actual events the organization has experienced in the past to identify evidence of both perceived and underlying assumptions, beliefs, and values
- **Enactive of Sensible Environments** – sensemaking seeks to create an understanding of the socially constructed, enacted, situation since people are all agents and actors in an organizational context
- **Social** – sensemaking focuses on how individuals work within a social context to create meaning or make decisions, and these meanings or decisions are based on interpretations of what others are doing in the organization
- **Ongoing** – sensemaking begins when an individual or organization chooses to look back at what has happened, and the process of sensemaking continues in time as participants construct meaning

- **Cue extraction** – sensemaking looks at cues, which Weick (1995) describes as "familiar structures that are seeds from which people develop a larger sense of what may be occurring", and these cues may lead to identifying patterns of beliefs, assumptions, and values that had not yet been questioned by the organization
- **Plausibility** – sensemaking gathers enough information to construct meaning but does not seek to gather all the information

These elements of Weick's framework for sensemaking assisted in developing both the data collection methods and the initial data analysis phase of this capstone project. See **Figure 3:** Sensemaking framework for data collection and initial analysis.

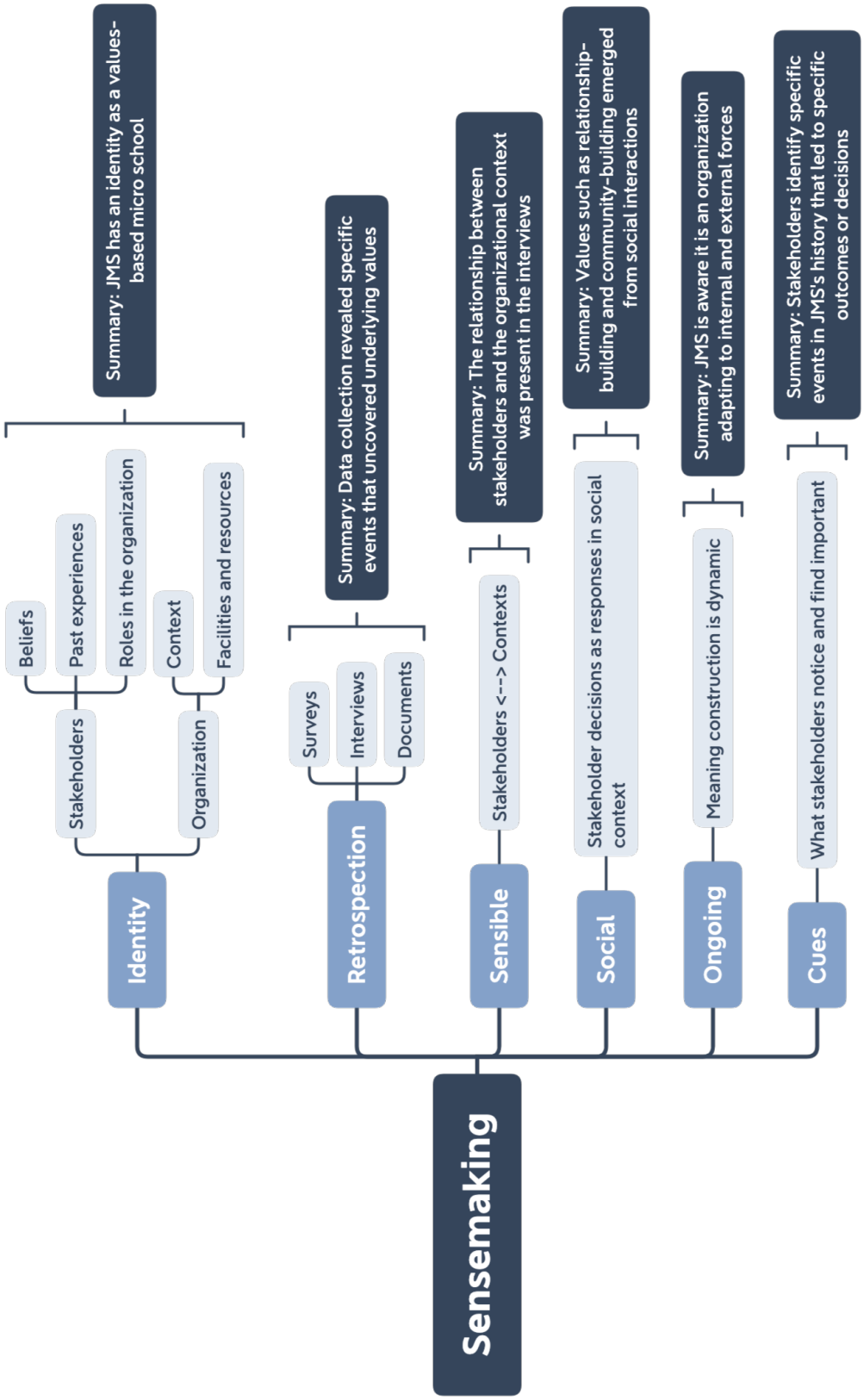


Figure 3: Sensemaking framework for data collection and initial analysis.

Data Analysis Framework

For analyzing JMS's perceived values and any values identified during sensemaking, I employed a four-part framework for organizational culture created by Denison and Mishra (1995). This framework identifies elements of an organization's culture that act as predictors of organizational effectiveness. The four elements of organizational culture include the following: involvement, consistency, adaptability, and mission. See **Figure 4:** Organizational culture predictors of effectiveness.

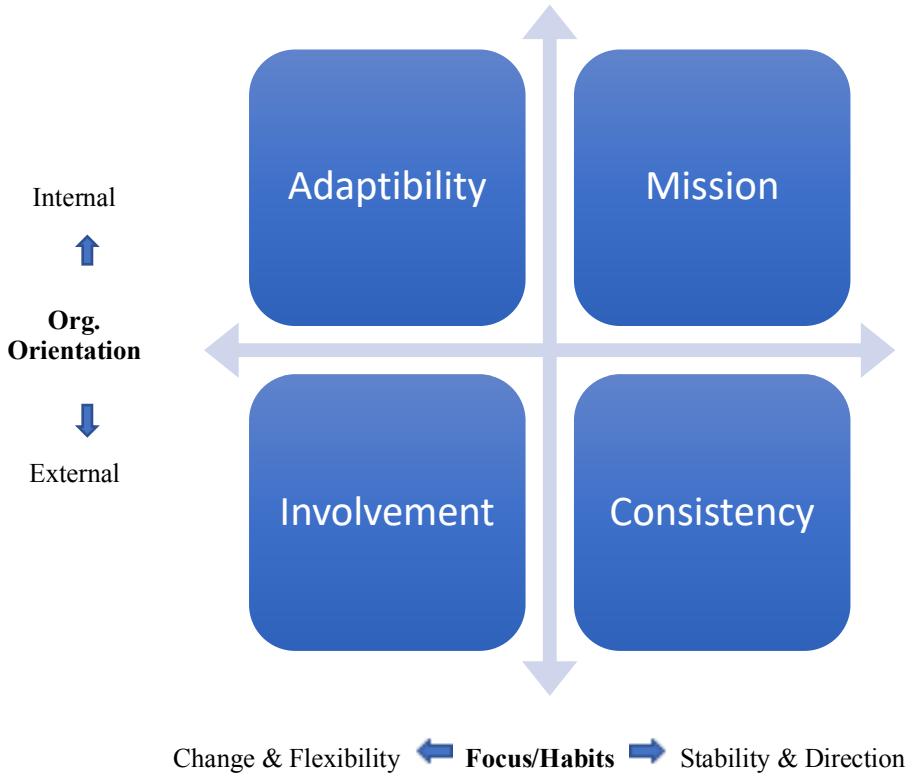


Figure 4: Organizational culture predictors of effectiveness.

According to Denison and Mishra (1995), elements related to organizational members' *involvement*, such as having a sense of ownership in practices, and elements

related to an organization's *adaptability* to external factors all highlight the organization's capacity for "flexibility, openness, and responsiveness" (p. 204). The researchers found that involvement and adaptability traits are the greatest predictors of organizational growth. Elements demonstrating *consistency* in an organization, the normative integration within an organization, and an organization's understanding of its *mission* highlight the organizational "integration, direction, and vision" (p. 204). The researchers found that these two elements are the greatest predictors the organization's profitability.

Since JMS is an educational, non-profit context, I will replace "profitability" with the concept of *enrollment-growth* as non-profits, especially schools, rely on different sources of revenue than for-profit businesses (Moore, 2000). JMS's core values may fall into categories that align with this four-part framework for organizational culture and effectiveness, especially the categories of adaptability and mission, as the school is a young school undergoing many levels of change concurrently with a global pandemic, COVID-19, which has complicated organizational operations across the globe.

Capstone Project Questions

There are two main questions guiding this capstone project, and each has its roots in the Sensemaking process. Using a guiding set of concepts, such as the project questions in this capstone, can help participants in the Sensemaking process create collective understandings of what is going on in an organization (Weick, 1995). The first question sought to identify the stakeholders in the organization and what underlying values guide their understanding of how the organization operates and what the meaning is of cues that

they perceive. Stakeholders had the chance in interviews to elaborate on events that they recalled from their experience at JMS, pointing out cues and attaching perceived outcomes from the events. By looking back at what happened at the organization, stakeholders identified who makes choices in the organization, who participates in decision making, what the consequences are of organizational members' choices, and what the impacts are of those choices on the organizational members and the organization as a whole.

Project Question #1
What core values are important to different stakeholder groups at JMS?
Question 1a – Who are the stakeholder groups in the organization?
Question 1b – Do core values differ across stakeholder groups?

This first question has two sub-questions to help define the values in the organization and what stakeholder groups espouse what values. It is reasonable to think that the different stakeholder groups would espouse different values since the organization caters to Nashville's Jewish and secular communities, it has doubled its governing body, and it employs both Jewish and secular faculty and staff. The three full-time classroom teachers, one of whom is co-head of school, and an office staff member are secular while the educational support teacher, two part-time Jewish education teachers, and the other co-head of school are Jewish.

Sensemaking also identified additional stakeholder groups during the qualitative interviews. While the qualitative interviews were directed at a known stakeholder group, the full-time classroom teachers, protocol questions that asked for explanations or examples of events or choices that the organization has made identified additional stakeholder groups.

Project Question #2
How does JMS currently measure organizational effectiveness?

The second question is designed to identify how JMS views its effectiveness at delivering on its mission and fulfilling the wishes of its stakeholders. As both a young school and a school that has had to adapt yearly to significant changes, identifying how the organization measures effectiveness will be important for helping the organization measure growth and performance over time. By establishing an understanding of its culture, stakeholder expectations, and success at reaching those expectations, JMS may better proceed in values statement construction and the accreditation process this coming academic year and in the future.

Methods

Participants

This capstone was a mixed-methods design project involving qualitative and quantitative methods to investigate both perceived and underlying values at JMS. I performed a sensemaking investigation through both quantitative surveys and qualitative interviews, and then I supplemented these data collection activities with a qualitative document analysis. Engaging two major stakeholder groups in the organization, Board-of-Directors/administration-level members and classroom faculty, the surveys, interviews, and document analysis collect data on the culture of and underlying values of the organization.

During the sensemaking process, these two major stakeholder groups had chances to voice both current and future beliefs of the true purpose and intent of the organization.

I employed purposive sampling due the small population size of each stakeholder group to collect data from the entirety of both populations. The population of each stakeholder group was small: Board/administration, n = 18 individuals; faculty, n = 3 individuals. This limited the quantitative analysis but provided a thorough review of those stakeholder groups' perspectives. Both project populations represent major stakeholders in the organization and represent the majority of members involved in directing the day-to-day and long-term goalsetting in the organization. I recruited the survey and interview participants via email sent to Rabbi Strosberg who then forwarded the email to the target members in the organization. All target individuals agreed to participate, which initially included four classroom teachers and eighteen Board/administrative-level individuals. After one faculty member left the organization in the early spring of 2021, the resulting participant population included three classroom faculty and the eighteen Board/administrative-level individuals.

Materials

Quantitative Data Collection via Surveys. For the sensemaking stage at JMS, I began with two surveys, each specifically designed for the two different stakeholder groups at JMS. The reason I used two different surveys is three-fold. First, there is no single survey in school effectiveness or school culture research intended to assess all levels of the organization from frontline employees to governing members. Some example formal surveys (ones not created in-house by an organization) that assess school culture include the *School Culture*

Survey by Saphier and King (1985, as cited in Edwards, Green, & Lyons, 1996), the *Organizational Health Inventory* (OHI-E; Hoy, n.d.), the *Middle School Description Survey* (Daniel & Blount, 1992), and the *Revised School Culture Elements Questionnaire* (RSCEQ; DeVaney, Adams, Hill-Winstead, & Trahan, 2012). Each of those surveys is designed specifically to be taken by classroom teachers and to be used by administrators or researchers. Second, the two different stakeholder groups, Board of Directors and classroom faculty, in most independent schools do not regularly interact, therefore their purpose and contexts are different, requiring different assessments of organizational culture. The classroom teachers are frontline employees who engage with the day-to-day work in the organization in a dynamic context, whereas the members of the Board of Directors are tasked with long-term planning and organizational governance, tasks which align with stability and hierarchy (Hartnell, Ou, & Kinicki, 2011). And third, by using two different surveys, each tailored to the specific stakeholder group, I could assess the alignment of underlying organizational values across different categories such as stated, implied, and perceived values.

For the first stakeholder group, the Board of Trustees and school administrators, I administered a short survey developed by Denison and Mishra (1995) which has been successfully used by organizations to understand its culture, its focus or habits, and its orientation in relation to the markets in which it operates (See **Appendix A:** Board- and Administration-Level Survey of Organizational Values). The survey included 8 questions in pairs per each of the four areas of interest identified in Denison and Mishra's (1995) theory of organizational effectiveness: involvement, consistency, adaptability, and mission. Each

answer was a four-point Likert scale: 1 “Strongly Disagree”, 2 “Disagree”, 3 “Agree”, and 4 :”Strongly Agree”. A four-point scale was used to avoid a neutral response. With the population size equaling only 18 individuals, I was interested in strength of opinion as to these four areas of the theory of organizational effectiveness relative to stakeholder perceptions organizational culture.

For the second stakeholder group, classroom teachers, I administered the Revised School Culture Elements Questionnaire (RSCEQ; DeVaney, Adams, Hill-Winstead, & Trahan, 2012). This survey contains twenty questions and has two different sets of responses: the first set gathers what the teachers perceive about cues at the school *actually as it is now*, and the second set of responses gathers opinions of the school that the teachers would *prefer*. Again, the survey used the four-point Likert scale to avoid a neutral response. See **Appendix B:** Teacher-Level Survey of Organizational Values. This survey has been used to capture both current perceptions of school culture and capture teachers’ wishes or preferences. This is critical for adding to the Sensemaking process, for the survey can identify through disparities between *actual* and *preferred* responses which cues or activities teachers place value in or feel strongly about.

Qualitative Data Collection via Interviews. Following the survey research, I conduct individual interviews via Zoom with the three classroom teachers. Each of the interviews lasted between 30-50 minutes, and the focus of the interviews remained uncovering underlying values of the organization, but the exact questions differed slightly as the role of the faculty members differed as the progression of the interviews developed. I recorded the

interviews and transcribed them verbatim for coding in the data analysis phase. See **Appendix C:** Interview Protocol for Individual Faculty Interviews.

The interview protocol follows the conceptual framework for organizational effectiveness from the Board/administration survey, an adaptation of Denison and Mishra's (1995) theory of organizational effectiveness. The questions were designed to find cues related to stakeholder *involvement*, organizational *consistency*, organizational *adaptability*, and *mission*. These four areas also served as initial codes for data analysis. The questions often followed a laddering process (Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006), meaning that interviewees' responses may have noted a cue or specific event, then I asked a follow-up question for them to elaborate on that cue or event, and if their response allowed, I then asked for an option or feeling about the cue or event. Using this laddering process allowed different interviewees space to potentially include organizational- and personal-values to the Sensemaking process.

Qualitative Data Collection via Document Analysis. Finally, I analyzed two documents provided by JMS regarding organizational purpose and mission. These documents were intended to drive the creation of organizational values statements and define the organization's purpose at the Board-of-Directors level. Again, the document analysis followed the conceptual framework for organizational effectiveness from the Board/administration survey, an adaptation of Denison and Mishra's (1995) theory of organizational effectiveness. The text was coded initially with stakeholder *involvement*, organizational *consistency*, organizational *adaptability*, and *mission*.

Procedure

After I received notice in October of 2020 from each Board- and administration- level participant of their agreement to participate in the capstone project, I set up a date with Rabbi Strosberg to administer the Board- and administration- level survey. The survey was administered via Qualtrics to preserve the confidentiality and anonymity of each participant, and the survey window was open from November through February for a total of 12 weeks. During this time, I sent bi-weekly reminder emails to Rabbi Strosberg to forward to the Board in its entirety. The total number of possible participants was 18 and by the close of the survey 17 responses were recorded, for a total participation rate of 94%.

During this time, I also initiated the faculty survey. Administered via Qualtrics as well to preserve participant anonymity and confidentiality, the faculty survey window was open from mid-December through the second week of February for a total of 8 weeks. During this time, I sent bi-weekly reminder emails to Rabbi Strosberg to forward to the faculty. By the end of the faculty survey window, the three full-time faculty responded, for a participation rate of 100%.

After the surveys were complete, I set up individual qualitative interviews with the three classroom faculty via email. These interviews took place over Zoom videoconferencing software, and the average interview length was 38 minutes, 43 seconds. The survey responses were helpful in identifying that *involvement*, *adaptability*, *consistency*, and *mission* were cues that the faculty and Board/administration perceive, and the interviews were important for building a deeper understanding of those concepts.

Data Analysis

Answering the project questions was a three-step process beginning with quantitative analysis, followed by qualitative analysis of the individual interviews, then triangulation via document analysis. See **Figure 5:** Data analysis flow. The quantitative surveys served as discreet data resources but also informed the qualitative interviews and document analysis through confirming initial codes and confirming that discrepancies existed between stakeholder perceptions of what values were important at JMS.

Figure 5: Data analysis flow

The qualitative interviews served to create additional codes and identify specific values that the faculty stakeholder group perceive as important to the organization. These then were analyzed along with the Board/administration-generated documents. Codes were compared across all three data sources, and discrepancies or differences of opinion or belief were noted during the memoing process.

Quantitative Surveys. To begin to answer the project's research questions, the qualitative surveys were analyzed first in Qualtrics to find the mean, standard deviation, and

variance of each question's responses. Since the questions in the Board/administration survey were grouped into four initial code categories (*involvement, consistency, adaptability, mission*), I compared the responses to the Board/administration survey to the relative faculty survey responses for questions relating to the same four codes (See **Appendix D:** Board/admin and Faculty Question Matrix). Each of the four initial codes was subdivided by question, two subcodes per initial code. This resulted in a total of 12 codes (4 initial and 8 subcodes) to use when coding the faculty interviews for response comparison (See **Figure 6:** Code relationships, Board/admin and faculty surveys).

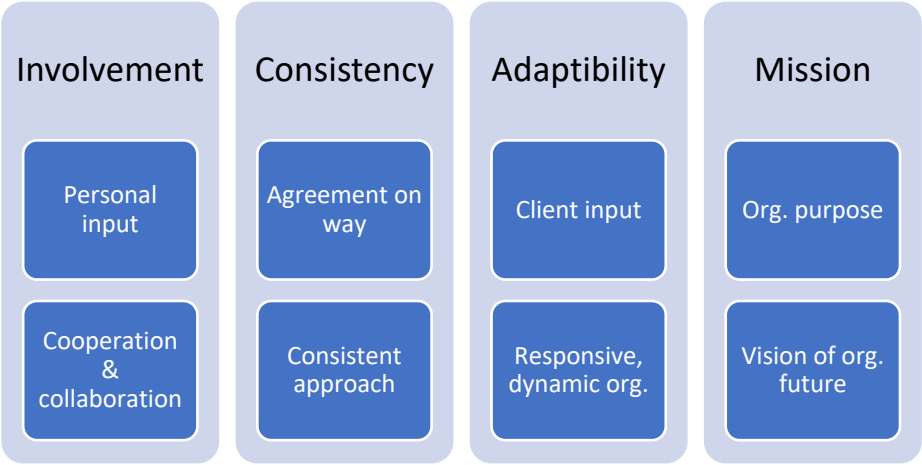


Figure 6: Code relationships, Board/admin and faculty surveys

All four initial codes relate to Denison and Mishra's (1995) theory of organizational culture and effectiveness. The subcodes attached to each helped delineate any differences in opinion between faculty and Board/administration per initial code.

Qualitative Interviews. The recorded interviews were transcribed using Zoom's automatic transcription and then the audio carefully edited at a later date using Audacity to remove background noise, isolate the interview participant's voice, and clarify any difficult

to understand portions from the transcriptions. The transcriptions were then compared against the audio files for accuracy.

Analyzing the qualitative interviews began with axial coding using the 12 codes generated during quantitative analysis. Additional codes emerged during this coding stage, resulting in the creation of six new parent codes: faculty development, organizational effectiveness, school size, stakeholders, student development, and student discipline. These were not found to relate to questions from the quantitative surveys but did relate to elements from document analysis, which will be described below in that data analysis section. For a complete qualitative code chart, see **Appendix E:** Code Chart from Qualitative Analysis.

The themes that emerged from coding the qualitative interviews were community building, relationship building, autonomy/independence, flexibility, inclusivity, and core values as stated or implied beliefs. Frequently respondents described specific events or behaviors that strengthened or created a sense of community in the organization through common practices, common beliefs, or common understandings of what had happened in the organization for JMS to have developed over time as it had. Respondents also mentioned relationship building activities and frequently excerpts described how the formation of new relationships strengthened the organization. The faculty described many instances of making personal decisions or having the independence for choice-making. Also, each respondent described specific events that showed organizational flexibility and resulting positive outcomes. Many of the cues related to interactions with student or parent stakeholder groups included language indicating inclusive practices in the organization,

referring often to *including others* or *taking others' needs into account*. Often, others' needs or interests went unquestioned before decisions were made, indicating high levels of faculty and organizational flexibility. Finally, specific values were mentioned frequently and coded as discreet values. The resulting list included the following values as either stated or implied beliefs: cooperation and collaboration, communication, community, humility, autonomy/independence, Jewish values, and relationship-building.

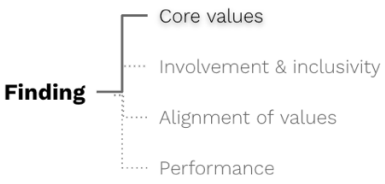
Document analysis. The two documents that JMS provided were coded using the same code set created during quantitative analysis and elaborated upon during qualitative interview analysis. Additional subcodes for "Org. purpose" emerged and are as follows: affordability, alternative schooling, child-centered education, flexible programming, Jewish education (different from "Jewish values" code), and supporting adolescents/adolescence. I re-coded the qualitative interviews using these new codes and each interview showed evidence of each new subcode of "Org. purpose".

Triangulation. After re-coding the interviews for codes created during document analysis, I compared codes across all three data collection methods and found evidence of each code in both qualitative data types and the initial quantitative codes across all three data collection types. After this I felt confident at reporting findings from the analysis.

Concerns About Data Analysis. One significant concern of the quantitative analysis is the low number of participants in the faculty survey and the resulting variability in the data. The faculty survey population consisted of three individuals, and the small number of respondents makes any discrepancy in response significantly affect the quantitative results. For example, one faculty survey respondent indicated on 12 out of 20 total questions

(questions 1-8 and 13-16) that they "strongly disagreed" with the question—a result that did not match the consistently positive responses to related questions from the interview protocol with the same participants. That their responses were consistently opposite to the other two respondents, and also were in groups of 4, leads me to question whether the respondent misunderstood the 4-point Likert scale or how to respond according to their opinion correctly using the Qualtrics web survey interface. Since each question had an "Actual" versus "Preferred" response, the individual may have become confused and incorrectly chosen a 1, "Strongly Disagree", versus a 4, "Strongly Agree". Due to the inconsistency of the survey data across faculty participants, I discuss these data but rely more on the results from the qualitative interviews. The interpretation of the quantitative findings relied more on identifying discrepancies between the Board and faculty surveys regarding the four codes of involvement, consistency, adaptability, and mission. This is further addressed in the Discussion and Limitations section below.

Capstone Project Findings

Finding 1 The following core values were either stated or implied during surveys, interviews, and document analysis: • Collaboration & cooperation • Communication • Community (community-building) • Inclusivity • Humility • Independence & autonomy • Jewish values • Relationships (relationship-building)	
Related project question #1: "What core values are important to different stakeholder groups at JMS?"	

After gathering input from stakeholders at different levels of the organization, the data show consistent underlying values at JMS that are universal values the organization can promote alongside its religious values.

Survey data: Involvement. The Board/administration survey shows the highest ratings on the 4-point Likert scale under the subcode "cooperation & collaboration" (*M* = 3.56, *SD* = 0.51) followed by "personal input" (*M* = 3.38, *SD* = 0.62). Involvement was also the highest rated initial code category for related questions on the faculty survey, although the order of subcode ratings was reversed from the Board/administration survey. For faculty, "cooperation & collaboration" (*M* = 3.25, *SD*= 0.45) was rated slightly lower than "personal input" (*M* = 3.32, *SD* = 0.76). Recalling that there was anomalous data from one

faculty survey respondent, the faculty survey data still shows involvement to be a meaningful value to organizational members. See **Figure 7:** Quantitative data chart.

		Board / Admin Survey		Faculty Survey	
Coded Question Category	**Preliminary Subcode**	**Mean**	**Standard Deviation**	**Mean**	**Standard Deviation**
Involvement	Personal input	3.38	0.62	3.32	0.76
	Cooperation & collaboration	3.56	0.51	3.25	0.45
Consistency	Agreement on way	2.94	0.44	3.05	0.46
	Consistent approach	2.88	0.62		
Adaptability	Client input	3.06	0.44		
	Responsive, dynamic org	3.19	0.66	3.67	0.75
Mission	Org purpose	3.19	0.98		
	Vision of org future	2.81	0.83	3.00	0.00

Figure 7: Quantitative data chart

The lowest rated responses on questions shared between the Board/administration and faculty surveys include the set of responses related to mission, subcode "Vision of org. future" (Board/admin *M* = 2.81, *SD* = 0.83; faculty *M* = 3.00, *SD* = 0.00). The second lowest rated responses are related to consistency, subcode "Consistent approach" (Board/admin *M* =2.94, *SD* = 0.44; faculty *M* =3.05, *SD* = 0.46). These two low-rated responses were compared to the qualitative interviews, and those findings are outlined below.

Qualitative interviews: Involvement and Faculty Development. In each of the three faculty interviews, instances of role-sharing and giving personal input into programming and day-to-day operations was noted and mentioned frequently. Some example responses from faculty interviews are as follows and relate involvement via collaboration and cooperation, and communication:

"I think it's easy to collaborate because…there's only three core teachers, so we're eating lunch together. We're talking all the time."
"…it's sometimes that I'm like, 'Okay, I have this idea for this unit, let's talk about it, because when you're doing that unit, let's group together to figure out something…'"
"…especially when we were tiny I really did run…all the day to day operations, and [co-head] was always right there…So, I mean, we probably talked three or four times a day, and so they are a collaborative leader..."
"So, parents are actually receptive and communicative when it comes to making sure their students are able to overcome some those challenges."
"I think that that's really important and that can take some real individual time. And so just investing that individual time, but I don't mind it. I think it's…a humongous return on investment. I spend a lot of time talking to families. I think that's part of who we are. If I didn't do that…the community piece just wouldn't feel like it does."

Employee participation in decision-making (PDM) is an often-studied phenomenon in organizations, and studies show the higher the level of involvement and participation of the employees in the organization's decision-making higher the performance of the organization overall. Brown, Reich, and Stern (1993) state that high employee involvement leads to high levels of situated learning in the organization, therefore to higher productivity and a desire for more training. Noah (2008) and Hewitt (2002, as cited in Das & Baruah, 2013) found that organizations with higher levels of employee PDM also have higher levels of employee retention, an important point for small organizations where employee turnover has

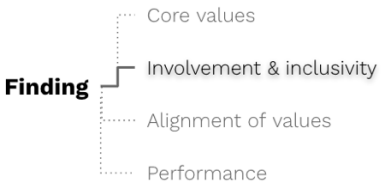
significant effects on operations. Alsughayir (2016) found a positive correlation between employee PDM and firm performance, stating that the relationship may be due to employee feelings of appreciation and authority in the organization. All of these are important for JMS as it is a small organization that has seen recent employee turnover negatively affecting its community, a desire by the faculty for training, and the collaboration leading to role-sharing and innovation.

Humility was an interesting finding, and respondents to the qualitative interviews conveyed humility in the form of forgiveness for mistakes, of downplaying one's own ability while highlighting positive effects of JMS's community, of an openness to express the need for help or guidance, or through discussions of organizational growth in size from only a few to many students:

"I don't want to say my own ability, but the natural…flexibility of the curriculum made it so that teaching felt very natural and very instinctual. And it surprised me how much…instinct you can have for teaching once you're in the classroom…maybe the way JMS contributes to that instinct is that they let teachers act on that instinct. It's about making the school work for the students, not the students work to the school. It's the same for the teacher."
"Yeah, we are not trying to save people. We are meeting them where they are and helping them celebrate wherever they are…"
"…and so there's times I'm running ideas for lessons by [coworker]. I also make a phone call, 'hey, can I do this in my lesson? Can I do that in my lesson?'"
"…so we're trying to fight that urge and just keep ourselves small and humble. And so, for me, a successful JMS in five years is going to be humble, and the right size, and what that size is I really can't say yet."

The implications of humility being an underlying value at JMS relate to job security, community, and innovation. The faculty may feel secure enough in their positions to express

failures or dissention with one another. This supports the organization's claim of a community feel and underscores its "clan culture" (Hartnell, Ou, & Kinicki, 2011). The willingness to express mistakes, ask for help, and stay small and focused may help JMS stay a dynamic organization. Clan cultures and tight organizational communities can suffer from group think (Hartnell, Ou, & Kinicki, 2011), and humility may aid JMS in promoting a culture where expressing disagreement or recognizing mistakes promotes innovative thinking and programming.

Finding 2 There are high perceptions of stakeholder involvement or participation in decision making at JMS.	
Related project question #1a: "Who are the stakeholder groups (at JMS)?"	

As stated above under Finding 1, involvement was the highest rated response category overall for both the Board/administration and faculty surveys, indicating a high level of role-sharing, and vertical collaboration between administration and faculty, and high horizontal collaboration and involvement between faculty. It was noted, however, that horizontal involvement and collaboration is informal and not necessarily pre-planned.

Through analyzing qualitative data, each stakeholder group (Board/administration, faculty, student, and families) has significant input into the daily operations and long-term

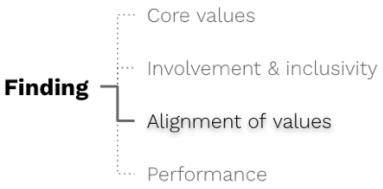
goalsetting at JMS. Families and students are not only sources of income for JMS, they are also sources of ideas for programming and curriculum. Two faculty note this as follows:

"…[a student's] mom said, 'gee, I really think he needs more of a math community as well.' And I thought, 'math community, that's a great idea.' So what I've done is I've taken…some kids out of my independent level math class one day a week to have a math collaborative…and it'll be truly advanced math projects for those kids."
"…for example, parents were asking for an after school program…so me and [coworker] just started an after school program. So…we sat down on the first day and we said to the students, we want this to be your after school program."
"So it started as a parent said, 'okay, can we have any after-school care,' and also from Saul wanting to have this…then it occurred, and then we wanted to sit down with the students and say, 'what do you want to see in this after school program; what do you want it to be?' So we've kind of had input from all around."

The literature on school culture indicates that the underlying values express themselves through the activities and actions in the school and the normative behaviors of the organization's members (Maslowski, 2006; Schoen & Teddlie, 2008). Here, teachers openly note how natural it is for families and students not only to provide input on programming, but also to be consulted by the faculty about wants and needs. This openness towards external input is a part of JMS's school culture. This finding ties in with the value of community as well, as having input from all stakeholder levels is one of the core values at JMS.

High stakeholder involvement has been linked to increased effectiveness, but other researchers tie this increase to the organization's context. Denison and Mishra (1995) state the more that involvement in ingrained in an organization's culture, the more effective it will be. Stakeholder involvement creates, according to Denison and Mishra (1995), "a sense of ownership and responsibility (p. 214), a good trait for a small independent school which aims

to retain loyal families. According to Allison (2019), in a dynamic market environment, such as the Nashville independent school market, an adaptive culture is necessary for organizational effectiveness, and the implication from this second finding that stakeholders perceive a high level of involvement means that JMS is adaptive.

Finding 3 Most values were consistent across stakeholder groups except for notable differences in perceptions of organizational consistency, adaptability, and mission.	
Related project question #1b: "Do values differ across stakeholder groups?"	

Quantitative analysis support. The data for this finding comes from document analysis and quantitative analysis. The data from quantitative analysis shows a discrepancy between feelings of adaptability and mission in the organization between the Board/administration and faculty (See **Figure 8:** Discrepancy of means: organizational adaptability). For questions related to adaptability and flexibility, the Board/administrative results are a mean of 3.19, closer to "Agree" with a standard deviation of 0.66. For the faculty survey questions related to a responsive, dynamic organization, the mean is 3.67, closer to "Strongly Agree", with a standard deviation of 0.75. This discrepancy of mean

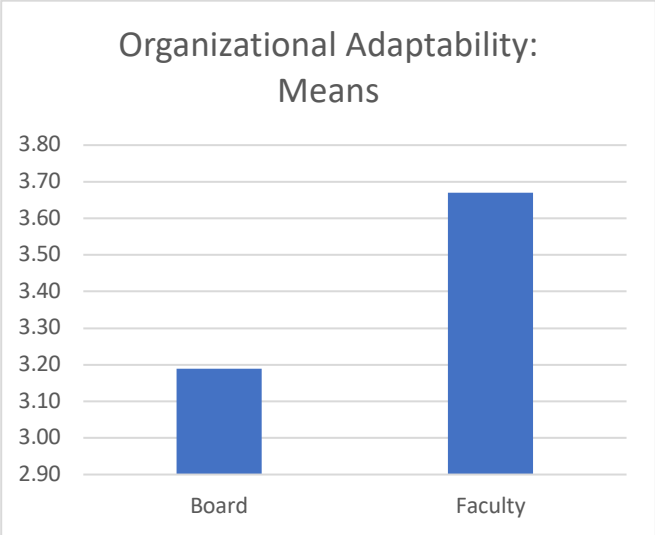


Figure 8: Discrepancy of means: organizational adaptability

responses to organizational adaptability may be due to the faculty understanding the effects of externalities and internalities on daily operations at the school while the Board of Directors does not have daily contact with the organization and would not have the same experiences. In Figure 9, the high standard deviation is due to the variability between the survey data. This quantitative result is affected by the inconsistency between one survey respondent (choosing 0, "Strongly Disagree") but no such sentiment present in the qualitative interviews. What is important is the standard deviation of the Board survey responses, as the high value (0.66) indicates a wide range of beliefs among the Board whether or not JMS is an adaptive organization.

The data also indicate that within the Board/administrative level there is a large discrepancy between opinions about the mission of the organization. For both questions under this category, the standard deviation is close to one whole response value. For question 7 related to long-term purpose, the mean is 3.19 ("Agree") with a standard deviation of 0.98. And, for question 8 related to shared vision of the future, the mean is 2.81 (below but close to "Agree") with a standard deviation of 0.83. See **Figure 9:** Discrepancy of means of Board responses to Mission.

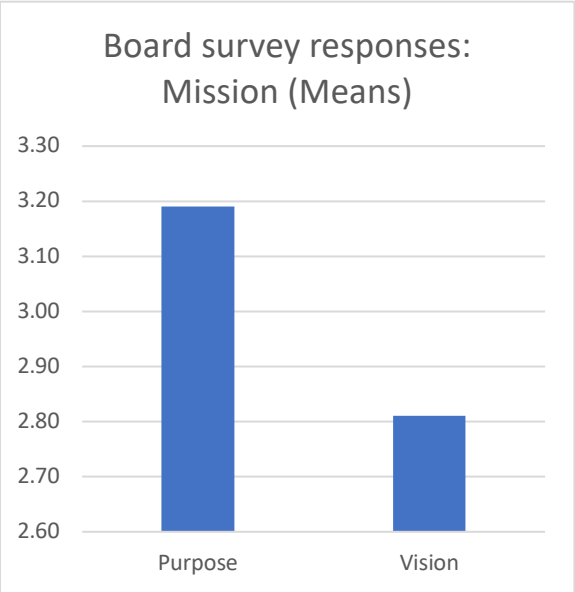


Figure 9: Discrepancy of means of Board responses to Mission

With a doubling of the size of the Board of Directors in the span of one calendar year, there may be a lack of consensus about elements of the organization that respondents relate to these questions about mission. This is reflected in the distribution of the Board members' and administrators' responses to questions 5-8 on the Board/admin survey. See Figure 10: Code Frequency: Board Documents and Faculty Interviews. Dissension among governing members is not uncommon, and in fact, shows that JMS does not suffer from group think (Hartnell, Ou, & Kinicki, 2011). Callaway and Esser (1984; as cited in Hartnell, Ou, & Kinicki, 2011) actually state "moderately cohesive groups" (p. 681) instead of tightly or loosely cohesive groups were better at decision-making, a key aspect of organizational governing bodies. Denison and Mishra (1995) make a similar claim that the presence of different opinions or needs within an organization is a trait of "excellent managers and organizations" (p. 217).

Document analysis support. During document analysis, the discrepancy between the Board- and administration-level stakeholders and faculty emerges when examining organizational purpose statements. On those two documents there were 54 discreet statements related to mission and/or organizational purpose. The most common phrases

used to describe JMS's purpose from the Board- and administration-level brainstorming documents versus faculty mentions of the same concepts in interviews is as follows:

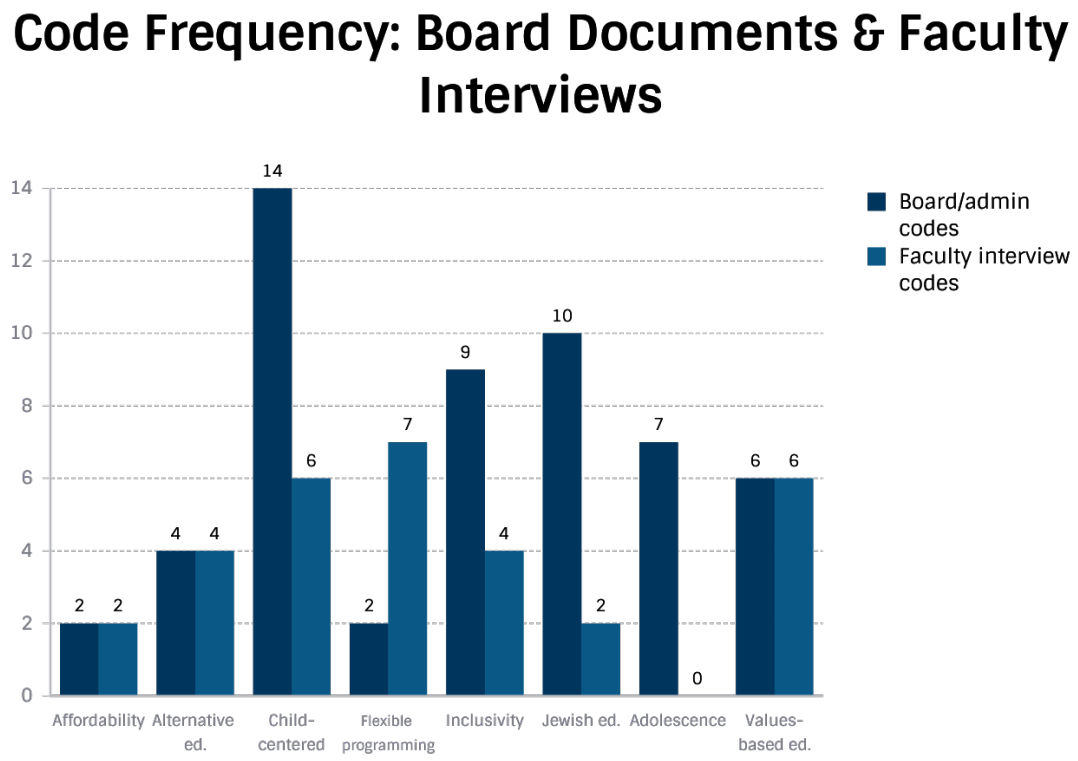
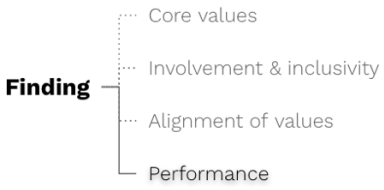


Figure 10: Code Frequency: Board Documents and Faculty Interviews

The discrepancies seen in Figure 10 between values and beliefs such as the organization being child-centered, the programming being flexible, and the focus on Jewish education stems from two possible points: the Board/administration are predominantly Jewish whereas the faculty are not Jewish, and the purposes of the two stakeholder groups is different within the organization. The Board/administration focuses more on long-term operations and with communicating the vision of the school, but the faculty focuses more on

daily-operations. A Board-level document stating the school as being adolescent- and child-centered is a fact for the teachers while it is a strategic vision for the Board. Also, Jewish education is an important aspect for the Board members who are Jewish while the school's non-Jewish families are more interested in an inclusive, community-centered school (Rabbi Saul Strosberg, personal communication).

Conflict of this type is not uncommon in organizations. In fact, Denison and Mishra (1995) found that effective organizations have internal conflict around culture and values. The literature on the values definition process indicates that the process itself is important for stakeholders in an organization (David, 1989), and that conversations about vision, values, and goals are healthy for strategic planning and for the establishment of routine (Allison, 2019). JMS has had to undergo many changes in the past 18 months, and these findings related to internal discrepancies in opinion are not surprising, but they do need to be managed actively to promote the organization's values of communication and collaboration.

Finding 4 JMS measures organizational performance in more contemporary social/community measures in addition to traditional input-output measures.	
Related project question #2: "How does JMS currently assess organizational performance?"	

Traditional output measure of organization size. The most significant response in the qualitative interviews regarding performance measures was related to the organization's size, especially the size of its student body. This type of performance measure is an input-output measure easily quantified and related to the organization's input. In the three faculty interviews there were 11 excerpts related to school size, the majority related the growth of the student body to organizational performance. Admitting a greater number of students than previous years, moving to a larger facility to accommodate social distancing guidelines, and other factors would be contributing to the natural growth in size of this output measure.

Contemporary social/community measures. A different output measure of organizational performance is relationship-building, and this type of effectiveness measure correlates with a contemporary view of effectiveness tied to pro-social student behaviors. In all three faculty interviews, the teachers mentioned student-peer, student-teacher, and teacher-parent relationships as evidence of JMS following its purpose. Some excerpts below show this underlying correlation amongst the faculty between relationships and organizational purpose:

"I can't imagine [JMS] ever being a much bigger school because so much of its philosophy and its mission works on the fact that teachers really get to know their students, and students really get to know their teachers…and it's a, it's a warm nurturing special environment."
"If they're willing to work with us and be part of our Community and step up and be good parent partners, which also includes trusting us…"
"I think it's great that the students are able to really open up about previous challenges in different schools and… didn't fit in a public school environment, didn't fit in the homeschooling environment, or grew out of those environments, let's say, and finding their spot…"
"…it's actually very interesting because one of the students I don't have for social studies, but we still have this great relationship. And now all of a sudden, he's in one of my classes, because we're doing a project with English, and I'm like, I'm just so happy to have you in my class right now…"

Currently, JMS does not employ a formal method of tracking student and faculty pro-social behaviors. The school does not employ a traditional discipline method, either, relying on communication between a co-head of school and the offending or disruptive student. One interviewee stated that they had never had experience in a school without a formal discipline system, the implication of this being that there may be concern among the faculty about this lack of formal tracking and maintaining protocol around student behavior infractions.

The literature on contemporary measures of organizational performance indicate that pro-social behaviors are measurable and do indicate external projections of organizational climate and culture (Ahmed, Minnaert, Van der Werf, & Kuyper, 2008; Galván, Spatzier, & Juvonen, 2011; Estelle, Farmer, Cairns, & Cairns, 2002; Oberle & Schonert-Reichl, 2012; Shann, 1999; Wentzel, 1991). Students feeling understood, parents partnering with teachers, students finding their voice in the classroom or making new friends, all of these are

measures that could be aligned with the core values of the organization to create output measures for long-term tracking of organizational performance aligned with its organizational values.

Recommendations from Findings

The following three recommendations are based on the findings from quantitative and qualitative analysis and are designed to meet the needs of JMS as it continues to develop as an organization in Nashville's independent school market.

Recommendation 1

Clearly differentiate between the espoused Jewish values and universal community values in clear values statements to promote the dual mission of the school. Revisit the values list periodically as the organization develops over time.
Stating in a list or clear values statement the underlying, community-centered values identified in this capstone project in conjunction with clearly defined Jewish values the school wishes to foster will make prospective families more informed of the dual mission of the school and how they as potential members fit into the community. Currently, there are statements published on the JMS website, and there are definitions of Jewish values espoused and promoted by the organization, but adding clarity to universal, community-centered values could assist non-Jewish families in finding their place in the learning community. Creating this list and resulting statements should include at minimum both of the two key stakeholder groups from this Capstone project: Board/administration and classroom faculty. Including multiple stakeholder groups will allow for more voices in the organization to be heard and more buy-in from participants' increased "ownership and responsibility" (Denison & Mishra, 1995, p. 214). Involving at minimum the Board/administration and the classroom faculty would allow JMS to address the discrepancies in opinion regarding adaptability and mission/vision.

One novel way of co-authoring values statements comes from the literature on effective mission statements and stakeholder involvement. Martin, Cowburn, and Mac Intosh (2017) describe a procedure in which a college sports team underwent a writing and presenting cycle, staring with small groups and growing towards whole-group consensus. See **Figure 11:** Example values statement coauthoring process.

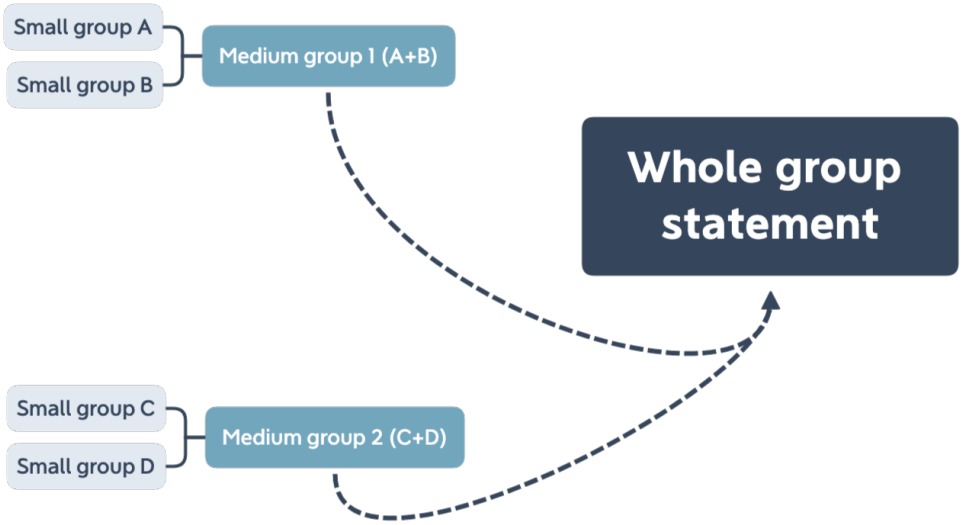


Figure 11: Example values-statement coauthoring process (adapted from Martin, Cowburn, & Mac Intosh, 2017)

Initially, the small groups allowed each member to have one voice, then they chose the best representative statement for the next step. Then, small groups joined to create medium groups and a space for collective discussion and co-authoring. The medium groups then presented and the final stage of co-authoring took place to create the final statement representing a bit of each member's input.

Connection to Finding #1 – Core values

The majority of stated and implied values from document analysis and qualitative interviews resulted in listing universal, community-centered values not related to

Jewish values. Also in the two mission/purpose-related documents and during qualitative interviews, "Jewish values" were mentioned as a contained set, not listed as specific values.

A concise list of Jewish values alongside universal, community-centered values could not only serve the organization as a guidepost for strategic planning and daily operations, it could also more clearly define for prospective families the dual mission of Jewish education and education for all adolescents in a values-based, community-centered micro school.

Connection to Finding #3 – Alignment of values

Based on qualitative analysis results from the faculty survey and data from interviews, the faculty strongly agree that JMS is a responsive, dynamic organization. However, the Board/administration survey results suggest that there is agreement this is true, but to a lesser extent than the faculty. Two faculty responded "Strongly Agree" and one responded "Agree" that JMS is adaptable, and among the Board/administration results the majority chose "Agree".

As noted earlier in this paper, frontline workers, such as classroom faculty, will have a better understanding of daily operations and may be representing their perception at this operational level. Board members will not have a close understanding of daily operations but will be considering market conditions and longer-term goals. Since communication is important to the organization as a core value, there should be opportunities for these two stakeholder groups to communicate and clarify how adaptable the organization is and how this can be seen as an asset for long-term planning and promotional content.

In relation to mission, the faculty all "Agree" (*M* = 3.00, *SD* = 0.00) that JMS has a vision of the future, however this was not the case amongst the Board/administration responses. This stakeholder group, being charged with long-term strategic planning and goal setting, should address this discrepancy, as the average response was between "Disagree" and "Agree" (*M* = 2.81, *SD* = 0.83). Those members at this stakeholder level should feel validated and their contribution to the JMS community heard, and this open communication can be a strong exercise in community development, mission clarification, and resiliency to conflict.

Connection to literature – Values statements and their purpose

The literature on values statements indicates that values statements are tools frequently used in strategic planning, but they are also tools for projecting organizational purpose and values (Daniel & Blount, 1992; David, 1989; Driori, & Landau, 2011; Moore, 2000). As JMS continues in its path towards accreditation, and as the organization continues to grow, a defined list of values that it can use as a guidepost can serve multiple levels of stakeholders in the organization and inform practice from the classroom to the Boardroom.

Connection to literature – Reactions to market conditions and change

As a micro school operating in a competitive independent school market, JMS should maintain adherence to adaptability based on Denison and Mishra's (1995) matrix of organizational culture and effectiveness. Organizations that are highly adaptable and that see high levels of stakeholder involvement are more like organizations that value growth over profitability. Since schools typically do not

measure profitability as an output measure, financial stability could be adapted instead.

JMS has secured donors to promote financial stability, so maintaining high levels of involvement and adaptability should be a priority if organizational growth is the long-term goal of both the Board and faculty stakeholder groups.

The literature on values statement creation suggests that the process itself is beneficial to any organization, possibly more so than the resulting values statements themselves (David, 1989). Open communication from each member of the Board/administration regarding the future of JMS is an opportunity for community building, problem solving, and growth.

Recommendation 2

Create a parent/family council to assess new programming recommendations and their relationship to JMS's core values.

Promoting stakeholder involvement and inclusive practices is at the core of what JMS does both on a daily basis and in programming. To foster stakeholder participation and maintain a close sense of community as the organization continues to develop, creating a community-within-the-community where parent and family voices can be heard in an official manner could be important for many reasons.

As the organization develops, adherence to community values should be a priority to maintain adherence to mission. The Board, administration, and faculty should remain involved in developing and assessing programming, but if JMS wishes to

continue to develop in size and in diversity, these stakeholders will eventually be taxed as a resource for hearing stakeholders' voices or gauging the relevance and adherence to mission of programming or curricular ideas. Additionally, as the parent-body grows along with the growth of the school, there is a risk that parents will be less involved or have fewer chances for having their voice heard by the faculty or administration. Therefore I recommend that JMS have a small team of veteran JMS families who understand the organization's development over time and who have a line of communication with all of the stakeholder groups can serve to receive external input, gauge alignment with current programming, past programming failures and successes, and organizational values.

With the co-heads of school engaged in both administrative and teaching duties, having a front line of individuals who hold the organization's best interests close can relieve some stress from JMS administration while promoting stakeholder inclusion and involvement. If this parent council succeeds in maintaining alignment between new programming or ideas with JMS's core values, then this recommendation could extend to a similar student council in the future.

Connection to Finding #2 – Involvement and inclusivity

Rated highly by both the faculty and the Board/administration, involvement is a value that is important to JMS. With a small community and a highly-engaged administration, it is important that JMS continue to promote stakeholder involvement at all levels to adhere to community-centered values.

Faculty indicated that role-sharing is important, with faculty development through increased responsibility being seen as an indicator of trust and growth. Extending this sense of trust and expected growth to the parent/family community through

developing a parent council would be similar: a deeper and routinized engagement of a key stakeholder group.
Connection to literature – Change and School Culture Micro schools are vulnerable to change as the size of the community is small, so change is amplified when compared to larger, more traditional organizations. Parent input is important, but so also is adherence to organizational values. If suggestions arise for programming that detracts from community-centered values, factions could arise within different stakeholder groups and cause tension or conflict. Organizational values change over time (Allison, 2019; Denison & Mishra, 1995) through many processes, one being the inclusion of externalities like new individuals with varying perspectives and opinions. As JMS adapts to these externalities and a dynamic independent school market, it can use its values as a strategic tool (Allison, 2019) to monitor and mediate its change. If new ideas fit with the values of the school, then they will complement the culture of the school. If new ideas do not seem to fit the values, then the organization can revisit what it feels is important and adapt or maintain its stance. Desmidt and Prinzie (2008) surveyed research on mission statements and through sensemaking identified that there is an assumption in most organizations that once a mission statement is crafted then individuals and organizations adhere to it. Their research showed that is not the case, and organizational members do not reflect on how programming or practices adhere to the mission. Having a trained, experienced group of parents/family who understand the narrative history of JMS and can engage in sensemaking when presented with new ideas could act as a buffer for school administration, a guiding stakeholder group for new families as

they enter the JMS community, and an additional line of support for the organization as it concretes mission and values during the accreditation process.

Recommendation 3

Include clear values measures at the student, faculty, and organization-wide level in organizational performance measures.

JMS measures student academic performance and organizational financial performance in mostly traditional ways, but it also informally measures its core values such as high stakeholder involvement, collaboration/cooperation, engagement in the community, and others. Creating clear ways to measure these espoused and enacted values will assist JMS in assessing organizational performance as a values-based school.

Connection to Finding #4 – Measures of performance

JMS measures organizational performance through traditional, input-output measures of student achievement and financial stability. These traditional measures linked to student achievement include grading student work, communicating academic progress to families, and leveling students by ability levels akin to traditional schools. Other organizational measures include tracking student body size, monitoring facilities (size/capacity), and monitoring the organization's budget. The inputs of these output measures are traditional in that they are related to admissions, donations, and exercising the organization's budget.

However, JMS also informally measures and emphasizes more contemporary elements like relationship-building, stakeholder voice, stakeholder involvement in

decision-making, and more. These social/community-related measures are evidence of development and relate to the organization's values of community, values-based education, involvement, and cooperation/collaboration.

Creating measurable benchmarks for these values and social behaviors can help JMS assess program and curricular effectiveness over time. Therefore, I recommend that JMS begin formally measuring student, faculty, and organization-wide development over time.

Student development

One example relates to student discipline. All three interviewees mentioned student discipline in relation to individuals' behavior within the community or in relation to daily operations at the school, however there is not a formal discipline system at JMS. The school should decide on a system that promotes its core values.

There are many programs available today that formally introduce students to social-emotional learning (SEL) skills, train them, and then track students' development over time. Programs such as Committee for Children's *Second Step* are popular package programs that JMS can tailor to its value set and needs.

Faculty development

Two of the three faculty interviewees mentioned a desire for training, both expressions of interest were related to community building, student discipline, and classroom management. Providing faculty development opportunities geared towards values and classroom community can train faculty to develop, monitor, and measure aspects of their classrooms that are pro-social, pro-mission behaviors.

Organization-wide development

As a values-based school, JMS should center activities around specific values to keep them in the minds and practices of its stakeholders. Choosing ways to center events around specific core values should be not only at the Board/administration level, but also at the faculty and family levels to encourage participation by its community members. Other independent schools host special events for bringing new families on campus as well as host community days for their own stakeholders to promote school values, and JMS should do the same. Reaching out to peers in the micro school network, *Micro School Coalition*, and reaching out to fellow small, values-based schools in the Nashville area such as local Montessori or religiously-affiliated schools could be a resource for learning about effective school value-promoting events.

Connection to literature – Contemporary measures of organizational effectiveness

The literature shows that school effectiveness measurements are moving towards measurements of student social development and pro-social behaviors (Estelle, Farmer, Cairns, & Cairns, 2002; Shann, 1999; Wentzel, 1991) such as student motivation (Ahmed, Minnaert, Van der Werf, & Kuyper, 2008), peer acceptance (Galván, Spatzier, & Juvonen, 2011; Oberle & Schonert-Reichl, 2012), and problem-solving (Wentzel, 1991). This evolution from the view of school effectiveness as academic achievement towards a view of school effectiveness as social outcomes matches responses in qualitative analysis of values deemed as important at JMS, such as relationship-building, community, inclusivity, and collaboration/cooperation.

While output measures like student achievement or financial performance are necessary aspects of measuring organizational performance, since a set of aims of

the school includes student academic development and financial stability, the mission and vision relate more to community development and social development. These are measurable aspects of student and organizational performance, and tracking these measures over time can help JMS self-assess programming effectiveness and identify future needs.

Since all organizations have multiple levels of values, espoused and enacted (Allison, 2019), the more aligned the levels of values are the more effective the organization is in doing its work. It is not enough to publish strong values statements, regularly addressing variances in espoused versus enacted values through a sensemaking process can identify points of conflict before they become a problem and allow leaders to steer the organization towards an intended track (Desmidt & Prinzie, 2008).

Future Decisions this Capstone Project May Inform

This Capstone project sought not only to identify underlying core values of JMS, but also to serve as a guide for JMS for future decisions on organizational mission and promotional content. The Board of Directors and administration could review current values statements and revising them for relevance to the core values uncovered in this capstone project and to the dual-mission of JMS of Jewish education and education for adolescents of all backgrounds and beliefs.

Additionally, JMS has initiated the accreditation process and the results of this capstone will be useful to the organization. During the spring of 2021, I was contacted by the JMS and informed that they had begun the accreditation process. At that time, I had

completed data collection, so it became apparent that the capstone project completion timeframe would be beneficial as the accreditation process moved into a more formal stage during the 2021-2022 school year. For accreditation, JMS will benefit from the faculty survey data, the data analysis comparing and contrasting the Board/admin-level survey responses with the faculty surveys, and evidence of espoused core values that arise from the qualitative interviews. Since the interviews contain questions inquiring about daily operations at and long-term goals for the organization, JMS will be able to supplement their accreditation materials with results from analysis in this capstone project.

Discussion and Limitations

This capstone project directly engaged two major stakeholder groups at JMS, Board/administration and classroom faculty, in a sensemaking investigation of the organization's core values. The project was intended to shed light on what values drive the daily operations at the school and serve as underlying values during long-term goalsetting activities at the Board/administration level.

The stakeholders at JMS have seen the organization develop rapidly during its short existence, and through those changes they hold similar values as important. The first finding from data analysis of quantitative surveys, qualitative interviews, and document analysis revealed that stakeholders in the organization value collaboration/cooperation, communication, community/community building, humility, inclusivity/involvement, independence/autonomy, Jewish values, and relationship building. The second finding identified that stakeholders have a high level of involvement in the organization. The third

finding is that the underlying values are similar across stakeholder groups, except for perceptions of organizational adaptability and mission/long-term vision. And finally, JMS assesses organizational performance through traditional input-output measures and more contemporary, community-centered measures of student social abilities.

There are limitations to this study due to both the nature and context of the organization and the findings themselves. First, JMS is a boutique micro school serving a niche population in Nashville. It currently is capped by zoning restrictions from expanding significantly beyond its current student body, so it must remain small (fewer than 40 students). Also, its dual mission of providing excellent Jewish education as well as providing an excellent middle-school experience for adolescents of all backgrounds adds to JMS's uniqueness. These reasons, and that the school is unique in Nashville as being the only school designed only to cater to middle-level grades makes generalizability to other contexts difficult.

Project Limitations. Another limitation of this study is the small population of individuals available to study. As a small organization, the quantitative data population was three faculty for the faculty survey and eighteen individuals for the Board/administration survey. These small population sizes limited the statistical analysis possible for the study, and any difference from the mean in either survey significantly affected the statistical results. For example, on one faculty survey that seems anomalous due to no indications of negative feelings towards the organization during qualitative interviews, the survey response indicated strong disagreement on 12 out of 20 responses. Thus the importance of a mixed methods design when studying school culture and climate, as quantitative surveys may

assess surface perceptions or feelings, but qualitative studies can extract underlying values (Maslowski, 2006; Schoen & Teddlie, 2008).

A final limitation must be mentioned due to the context of this study, and that limitation is the restrictions imposed by the onset of COVID-19. This disallowed for observations of student behavior under normal circumstances and added significant uncertainty to procedures at JMS and all organizations across the country. As time progresses and JMS returns to operations as they were before social distancing restrictions, personal protection, and other safety precautions, daily operations will likely evolve and appear differently than they did during this capstone project. Thus the recommendations to routinize or establish social measurements for long-term tracking of organizational effectiveness.

Continued inquiry and project outcomes. As JMS is currently undergoing accreditation, results from this study may continue to be valuable to the organization for some time. Since values were uncovered that relate to universal, community-centered values, observations of daily operations and continued qualitative interviews with faculty could assist in uncovering JMS's development as the organization wishes to establish standards through accreditation. Additionally, as the micro school movement continues to develop in the United States, JMS is poised as a unique organization to provide evidence of that education model's success. JMS would benefit from joining a network of micro schools, such as the Micro Schools Coalition, for resources on sustainability, faculty development, community building, and more. Additionally, JMS would benefit from joining the Independent Schools of the Nashville Area association as an affiliate or member to receive

networking benefits from experienced schools who navigate the competitive market for independent school families.

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Appendix A: Board- and Administration-Level Survey of Organizational Values

I adapted the following survey of organizational culture from Denison and Mishra (1995). The original survey was intended for executive-level leaders in large corporations. I adapted the survey by substituting context-related words to align the questions with a school context while maintaining the intended purpose of the questions. A four-part Likert scale follows each question. The survey will be given on Qualtrics to maintain secure data and to facilitate survey administration during the pandemic of COVID-19. The survey took approximately 10 minutes to complete.

Adaptations

Where the original used "this company", I substituted "this school". Where it used "doing business" I substituted "doing our work in the organization". Where the original used "customers'", I substituted "families' and students'".

Survey of Organizational Culture at JMS

Involvement

1. Most people in this school have input into the decisions that affect them.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

2. Cooperation and collaboration across functional roles is actively encouraged.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

Consistency

3. There is a high level of agreement about the way that we do things in this school.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

4. Our approach to doing our work in the organization is very consistent and predictable.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

Adaptability

5. Families' and students' comments and recommendations often lead to changes in this organization.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

6. This organization is very responsive and changes easily.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

Mission

7. This school has a long-term purpose and direction.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

8. There is a shared vision of what this organization will be like in the future.

Strongly disagree	Disagree	Agree	Strongly agree
☐	☐	☐	☐

Appendix B: Teacher-Level Survey of Organizational Values

Revised School Culture Elements Questionnaire

This questionnaire contains a number of statements about things which occur in some schools. After reading each of the statements carefully, you are asked to judge each response according to two criteria: (1) *"how you and your school actually are…"* and *(2) "you would prefer that you or your school would be…"* You are to indicate the extent to which you agree or disagree with each of the statements. The "**actual scale**" applies to how "**YOU AND/OR YOUR SCHOOL ACTUALLY ARE**" and the "**prefer scale**" describes what you would "**PREFER TO BE OR WOULD PREFER YOUR SCHOOL TO BE LIKE**."

SCALE: 1=Strongly Disagree (SD) 2=Disagree (D) 3=Agree (A) 4=Strongly Agree (SA)

***"ACTUAL"* SCALE**					***"PREFER"* SCALE**			
SD	**D**	**A**	**SA**	**STATEMENTS**	**SD**	**D**	**A**	**SA**
☐	☐	☐	☐	Administrators provide visible, ongoing support for new school programs and ideas.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers are willing to help each other when problems arise.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers give priority to helping their students develop higher order thinking skills.	☐	☐	☐	☐
☐	☐	☐	☐	Administrators are sympathetic with problems and difficulties encountered by teachers in their work.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers share classroom experiences with each other to improve their understanding of students learning.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers incorporate the findings of educational research into their own teaching and learning practices.	☐	☐	☐	☐
☐	☐	☐	☐	Administrators work to ensure the cooperation of teachers.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers openly share problems with each other.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers believe that all students can learn.	☐	☐	☐	☐
☐	☐	☐	☐	Administrators visibly encourage teachers to be the best that they can be in the classroom.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers professionally share and learn from one another.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers are committed to professional growth to improve teaching and learning.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers and administrators work cooperatively in developing new school programs and policies.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers encourage each other to use professional judgment when making decisions.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers adequately plan teaching and learning activities to accommodate individual differences among students.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers receive the assistance they need from administrators and colleagues to enhance the quality of teaching and learning in their classroom.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers feel comfortable in providing suggestions to colleagues about ways in which to improve teaching and learning in their classrooms.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers spend time in professional reflection about their work.	☐	☐	☐	☐
☐	☐	☐	☐	Leadership roles are equally shared by teachers and administrators.	☐	☐	☐	☐
☐	☐	☐	☐	Teachers spend time together to informally discuss ways to improve the school.	☐	☐	☐	☐

DeVaney, Adams, Hill-Winstead, and Trahan (2012)

Appendix C: Interview Protocol for Individual Faculty Interviews

The following interview protocol is sensemaking (Weick, 1995) of the core values at Jewish Middle School of Nashville, and I have designed the questions to follow a laddering process (Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006) to allow for values to emerge from identifiable behaviors in the organization. Therefore, this interview protocol is a guide and the interview questions in the laddering process will vary as respondents reply with specific details. For example, a teacher new to the school may not have much of a response if they have not yet had experience collaborating at the school, but that information will be important for determining how collaborative the environment is overall at JMS

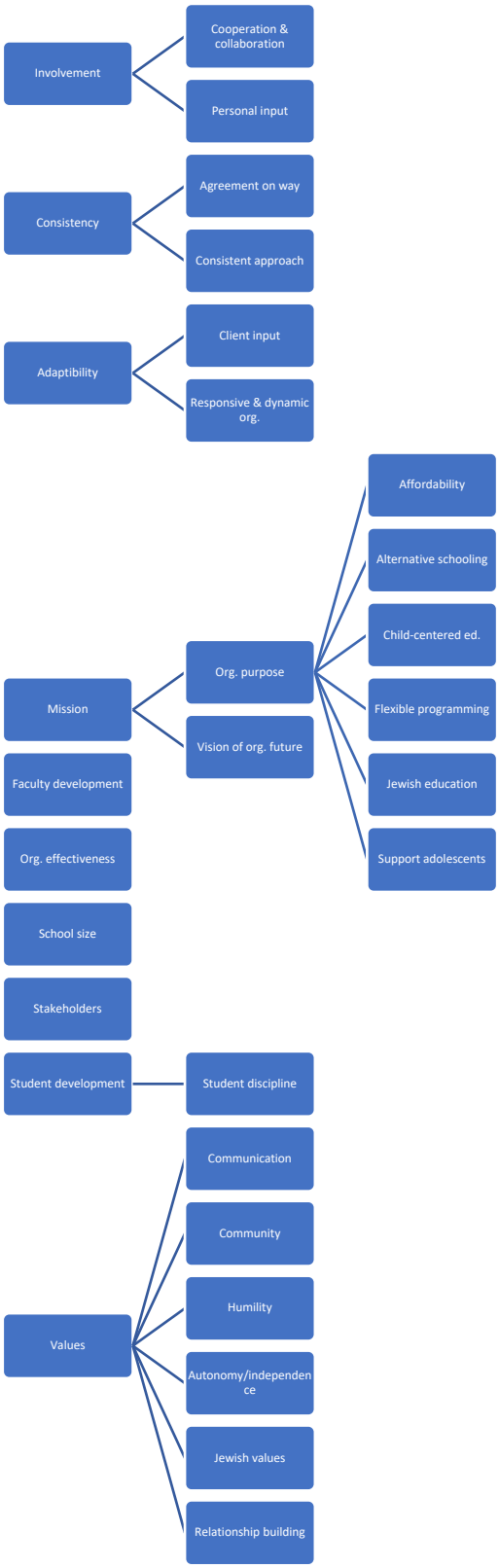
The interview questions are an adaptation of the survey items from Denison and Mishra (1995), which I am administering as a survey to the Board of Directors. The questions are predominantly open-ended so that the participant can name values he or she believes are relevant to the organization.

Interview question	Research question(s)	Theoretical framework	Literature
Tell me about your professional background. How did you get from where you started to where you are now at JMS?	1a. Who are the stakeholder groups?	Sensemaking: identity construction, retrospection	Weick, 1995
What interested you about JMS while you were searching?	1. What core values are important to different stakeholder groups at JMS?	Sensemaking: retrospection	Weick, 1995

How long have you been at JMS in your current position?	1a. Who are the stakeholder groups?	Sensemaking: identity construction	Weick, 1995
This question is about your day at JMS. What are some of the tasks or duties that you perform while at work? (if needed, use the following prompts to elaborate on daily tasks or duties) (a) First, think of daily tasks or duties. What might I see you doing if I were in school in the morning? Around lunchtime? What about in the afternoons? (b) Are any of the duties difficult or challenging? (c) Why is _____ difficult? *(include from part b)*	1a. Who are the stakeholder groups? 1b. Do core values differ across stakeholder groups?	Involvement, Consistency (Denison & Mishra, 1995) Sensemaking: identity construction, enactive of sensible environments, social, cue extraction Laddering	Denison & Mishra, 1995; Weick, 1995; Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006
Describe something at JMS that you had input in creating or changing in some way. (a) Who made the decision for you to work on it? (b) What is important to you about this? (c) Did you collaborate with others on this? (d) Why / why not?	1. What core values are important to different stakeholder groups at JMS?	Involvement (Denison & Mishra, 1995) Sensemaking: retrospection, enactive of sensible environments, social Laddering	Denison & Mishra, 1995; Weick, 1995; Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006
Has anything surprised you while at JMS? (if needed, use the following prompts to elaborate on daily tasks or duties) (a) Has a policy, procedure, or situation occurred that surprised you? (b) In what way? (c) Why do you think that is important to you?	1. What core values are important to different stakeholder groups at JMS? 1b. Do core values differ across stakeholder groups?	Consistency (Denison & Mishra, 1995) Sensemaking: retrospection, enactive of sensible environments, social, cue extraction Laddering	Denison & Mishra, 1995; Weick, 1995; Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006

Describe a way that family input or student input has led to improvement at JMS. (a) What was the situation and who was involved? (b) What was your / the organization's response? (c) Why did you / the organization respond that way?	1. What core values are important to different stakeholder groups at JMS?	Adaptability (Denison & Mishra, 1995) Sensemaking: retrospection Laddering	Denison & Mishra, 1995; Weick, 1995; Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006
Are there any other ways you have noticed JMS change since you started?	1. What core values are important to different stakeholder groups at JMS?	Adaptability, Mission (Denison & Mishra, 1995) Sensemaking: retrospection	Denison & Mishra, 1995 Weick, 1995
How have you seen the school enact its mission since you have been here? (if needed, use the following prompts to elaborate on daily tasks or duties) (a) Have there been any situations that the mission helped clarify what the right response should be? (b) What was that response? (c) What else could have happened instead? (d) Is it clear why the school did what it did?	1. What core values are important to different stakeholder groups at JMS? 2. How does JMS currently measure organizational effectiveness?	Adaptability, Mission (Denison & Mishra, 1995) Sensemaking: retrospection, enactive of sensible environments, social, cue extraction Laddering	Denison & Mishra, 1995; Weick, 1995; Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006
This question is about JMS's future. (a) What do you think JMS will look like in 5 years? (b) What will make it look that way? (c) Why will it look like that?	2. How does JMS currently measure organizational effectiveness?	Mission (Denison & Mishra, 1995) Laddering	Denison & Mishra, 1995; Reynolds & Gutman, 1988; Van Rekom, Van Reil, & Wierenga, 2006

Appendix D: Board/admin and Faculty Question Matrix

Involvement	B/A Q1: Most people in this school have input into the decisions that affect them.	F Q12 F Q13 F Q16 F Q19 F Q20
	B/A Q2: Cooperation and collaboration across functional roles is actively encouraged.	F Q2 F Q5 F Q8 F Q11 F Q14 F Q16 F Q17 F Q20
Consistency	B/A Q3: There is a high level of agreement about the way we do things in this school.	F Q1 F Q4 F Q7 F Q10 F Q13 F Q19
Adaptibility	B/A Q6: This organization is very reposnsive and changes easily.	F Q6 F Q12 F Q18
Mission	B/A Q8: There is a shared vision of what this organization will be like in the future.	F Q3 F Q4 F Q9 F Q15

Appendix E: Code Chart from Qualitative Analysis