

# Empowering Coherence

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An exploration of internal alignment and coordination of identity and service model in an education consulting firm

Authored by Kate Bracher and Victoria S. Pineda

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## *Abstract*

SchoolCo (a pseudonym) is a United States-based education consulting firm dedicated to providing technical assistance to states, districts, and schools across more than 25 states with the goal of increasing equitable support and outcomes for students. The firm entered a period of significant internal and external change that catalyzed a desire to reflect on how they cohered and conveyed the purpose and service model execution for their largest division. This project asked how aligned members of this division were in their understanding of their identity and how they coordinated their work, as well as how aligned other teams were in their understanding of this team's identity and coordination of work for purposes of calibration and comparison. This mixed methods case study used both statistical analysis and inductive qualitative coding on employee survey responses and focus group commentary to explore shared purpose and identity across employees, the frequency of collaboration routines, the quality of collaboration routines and behaviors, and systems for sharing and storing knowledge across team members. We found a high degree of alignment in the team's interpersonal trust and equity-driven purpose, but also misalignment in perceptions of service marketing, tension between customization vs. standardization of processes, and lack of coordinating systems to support collaboration. Drawing on findings and literature, we recommend the firm simplify its service delivery materials into more accessible language, layer in job-embedded supports for additional coaching and mentorship, and create effective linking mechanisms to improve the coordination of work, such as cross-functional team structures.

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## About the Authors and Dedication

**Kate Bracher** is currently a founding Executive Director for a K-8 charter network's expansion to a new state in Little Rock, Arkansas. Prior to this role, she worked at the Texas Education Agency on a new statewide initiative for K-12 superintendents and their teams in Austin, TX and previously served Title I school communities in Dallas, TX as a middle school teacher, assistant principal, and later principal. Prior to doctoral studies at Vanderbilt, she obtained her master's degree in educational leadership from Southern Methodist University.

*I am eternally grateful to my incredible Capstone partner Victoria who has been such a supportive research partner and became a lifelong friend throughout the course of this program. I also have so much gratitude for my wonderful family, particularly my husband Ben, who always created the space for me to fulfill this dream in our home and our son Luke, who made a number of unintentional guest appearances during classes.*

**Victoria Pineda** is a Certified Fundraising Executive (CFRE), with more than 20 years of professional development experience; fifteen of those years dedicated to fundraising for higher education. She has been responsible for more than \$96 million dollars of individual donations at various universities and nonprofits. Victoria has in-depth experience in strategic planning, stewardship and understands the giving climate within Texas and New Mexico as well as throughout the Western United States. Prior to doctoral studies at Vanderbilt, Victoria earned both an undergraduate degree and master's degree from St. Edward's University. Victoria says, "I believe that my love of people, philanthropy, community and a high-quality experience with a brand should be common practice in higher education."

*Thank you to my incredible partner, Kate Bracher; there is no one I would rather have shared the last three years with; you are the best kind of unexpected, wonderful there is! I love you from the bottom of my heart! To my precious hubby Richard and magical little girl Francesca, you all have been the most supportive ever; being part of the Pineda Trio is the best part of my life. To my beautiful tribe, thank you for loving and supporting me fiercely; you all make my world such a beautiful place!*

We would both like to extend our heartfelt gratitude to Dr. Jeanie Forray for being a constant support and Dr. Matthew Campbell for his candor and inspiration throughout our journey in this program. Your calming presence has molded us into the leaders we have become and will continue to guide us as we grow in our careers and impact organizations.

## **Introduction to SchoolCo**

### **Firm Structure and Services**

SchoolCo (a pseudonym) is a United States-based firm dedicated to providing educational research and technical assistance to states, districts, schools, and communities. Its goal is to increase equitable support and student outcomes. SchoolCo's work has impacted education in more than 25 states.

Their organization has two primary areas of focus for its consulting and capacity-building services, one of which focuses on school improvement efforts within schools and the state organizations and agencies that support them. Our area of inquiry focuses specifically on the school improvement side of their organizational structure.

SchoolCo has roughly 25 years of experience supporting state agencies, districts, and schools with school improvement initiatives and has conceptualized a theory of action that drives their service design and execution. At the center of this theory is a collective responsibility to focus on students, teachers, and content. Their school improvement team works directly with K-12 leaders to understand each layer of this theory of action for their unique context and needs, articulated through their commitment to design-based consulting. They do not believe in a “one size fits all” model and constantly respond to local needs, strengths, and community participation to build coherence, capacity, and broad network learning opportunities for the educational clients they serve. They also believe in the power of highlighting strengths over gaps or shortcomings to build confidence and narrow the focus for improvement efforts for organizations they partner with.

Beyond these elements of the school improvement vision within SchoolCo, the department generally operates services to clients in three workstreams: 1) Needs assessments and diagnostics, 2) Planning, and 3) Implementation (which captures school readiness assessments and connected district tools). For the current year, two key priorities for the school improvement team at SchoolCo are articulating and norming their client-facing services and supporting the new advancement office that was set to be operational in the 2023-2024 academic year.

### **Organizational Actors**

At the onset of our project, there were 58 members of the internal SchoolCo staff, generally broken down by the categories of senior leaders (3 roles), human resources, information technology and business (8 roles), advancement (1 role), research and impact (3 roles), school improvement and engagement (28 roles), external consultants (3 roles) and other consulting services (12 roles).

In our project, the key SchoolCo employees of focus were the senior leaders and consultants engaged in school improvement services. We also engaged key members of the marketing, research, and advancement teams, given how their functions depend on the information received from the school improvement team about their values and services.

### **Problem of Practice**

SchoolCo faced significant challenges both internally and externally before and throughout the duration of this project. In the fall of 2023, their CEO announced they would be stepping down from this leadership role in Summer 2024, which catalyzed a national search for their successor that spanned late fall 2023 to mid-spring 2024. The individual who had been named as the Chief Advancement Officer for SchoolCo in November 2023 was named as the

organization's new CEO in Spring 2024. The development of a redesigned office of advancement had been a strategic priority for the organization at the beginning of the 2023-2024 academic year, and leaders initially expected this could result in reorganization across several teams as well. These shifts came in the form of immediate and unexpected layoffs for 17 employees in early Spring 2024 due to financial constraints, which was a surprise to senior leaders on SchoolCo teams. The impact of promoting the leader who was initially chosen for a key leadership role in the office of advancement to CEO along with the significant layoffs that occurred just a week prior to this key succession announcement, remains unclear.

As these organizational transitions occurred within the organization, many of SchoolCo's clients in K-12 educational agencies and districts were also experiencing significant change and uncertainty. Legislative actions across different state political contexts dramatically impacted education policy (Jochim et al., 2022; Neuman, 2022), and the looming expiration of federal funding support from the pandemic years, known as Elementary and Secondary School Emergency Relief (ESSER) funds, forced scaled-back initiatives across many school districts (Bryant & Dorn, 2022; Silberstein & Roza, 2023; Barnum, 2023). As a firm dedicated to serving educational organizations through a lens of equity, this generated internal dialogue in the school improvement division about how to respond to shifting conditions in their field of clients. SchoolCo leaders felt that to have a unified organizational perspective on this response, there must be internal alignment and coherence on what they do (services and tangible project deliverables and outcomes) and how they do it (consultation, project management, and coaching).

The school improvement team at SchoolCo (SI team) shared that they are uncertain about the degree of internal alignment on their value proposition and service model delivery. Their

team operates with a consultancy model, but with new roles and shifting organizational structures, there is often limited insight into how each school improvement consultant talks about their organizational identity or executes the transfer of deliverables and coaching to clients. The external call for change in district feedback and service contract data is clear to them, but they have not yet systematically approached an in-depth way to understand to what degree they have internal consensus on their present values, the services they offer, or how the team or broader organization could be improved. Our area of inquiry focused on understanding the current state of internal communication and collaboration systems within SchoolCo that are specifically focused on the coherence of the school improvement team's theory of change and service model to district partners. By seeking to understand where there is evidence of alignment or misalignment within the school improvement team and across connected departments within the organization, we hoped to be able to illuminate areas for specific organizational improvement.

The organizational transitions and feedback from school improvement clients were two key developments that pushed organizational leaders to pause deeply and reflect. The feedback from existing educational clients, primarily senior leaders in school districts, all referenced financial and political constraints and a call for an adjustment in scale to existing projects. One set of client commentary referenced a desire to narrow project scopes and simplify the number of initiatives districts have in operation at any one point. Some districts had achieved the outcomes desired from their partnership with SchoolCo and had built enabling systems to sustain changes on their own (which is the primary outcome the firm strives for, so this feedback is celebratory and affirming for the organization).

A deeper dive into feedback data also highlighted some significant dissonance in processes across school improvement teams. While some degree of customization is expected in



their model of design-based consulting, several key leaders advocated for some core consistency in how their workflows initiate and develop over time, and the feedback highlighted some gaps in these core experiences for clients.

Feedback from stakeholders was one body of evidence to support the area of inquiry, but the ability of leaders on the school improvement team to honestly and openly reflect on these organizational problems was another critical source. Our team observed initial observational evidence that school improvement leaders at SchoolCo knew there were problems with their internal coherence on their services, and they were deeply aware of the challenges their clients have articulated. What remained unclear at the start of our project was how accurately they were diagnosing the root causes of these organizational gaps, which again reinforced the decision to focus our area of inquiry on the school improvement team at SchoolCo specifically.

We began this project with the following goals: (1) Deeply understand the organizational context within SchoolCo, specifically the function of the school improvement team, which constitutes the majority of the firm's field support to K-12 educational agencies and school districts, (2) Articulate project questions that will drive an analysis of strengths, problems, root causes, and improvement needs for the SchoolCo SI team, and (3) Generate recommendations that will help the SchoolCo SI team develop internal coherence on their vision for service design and execution that can be shared across the entire organization and inform future client workstreams.

## **Review of Literature**

As SchoolCo braces for structural transitions, leaders are also reflecting on the firm's broader organizational identity and how multiple divisions align on strategies and coordinate

current work. To help frame our central project questions, we first explore theoretical foundations in organizational identity, image creation and change. We then discuss the impact of the organizational structure in place at SchoolCo to understand context and enabling systems for knowledge management systems that enable broad strategy alignment. Finally, we outline relevant literature on organizational communication as it relates to knowledge sharing and transfer within an organizational context.

## **Organizational Identity and Image Projection**

### *Origins of Organizational Identity Conceptualization*

The concept of organizational identity was originally introduced as the attributes of an organization that members perceive as central, enduring, and distinctive (Albert & Whetten, 1985) that generally answers the question, “Who are we as an organization?” (Gioia, 1998; Stimpert et al., 1998). Identity claims, or explicit statements of what the organization is and what it stands for, are central to the development of these attributes and are used to craft identity beliefs that can represent a source of coherence and stability for the organization (Czarniawska, 1977; Albert & Whetten, 1985) or influence the strategic issues members attend to with varying levels of urgency (Dutton & Dukerich, 1991). Ideally, identity claims should reflect what organizational members and leaders envision as a desirable and attractive set of projected features—that is, their desired organizational image they wish to project (Gioia & Thomas, 1996; Price & Gioia, 2008).

The process of claim-making is socially constructed and evolves over time as influential members and groups try to persuade other internal and external actors to accept their conceptualization of the central, enduring, and distinctive features of the organization (Albert &

Whetten, 1985; Ashforth & Mael, 1996). Ultimately, an organization's beliefs influence its strategic investments, or the deliberate allocation of resources to address the needs and expectations of constituents by enhancing organizational capabilities, defining new product features, etc. (Rindova & Fombrun, 1999). Researchers have since expanded on Albert and Whetten's original conceptualization of organizational identity, noting that some organizational identities are more flexible, less central, and potentially even less distinctive than original definitions might suggest (Corley et al., 2000; Gioia et al., 2000). While a large body of research exists on the interdependence between organizational identity and its projected image, less is known about the specific gaps between organizational identity and a firm's alignment of strategies and investments (Elsbach, 2006).

#### *Organizational Identity Change and Discrepancy*

Over time, an organization's identity can shift based on specific processes or contexts, with identity drift and identity adaptation being the most cited processes. While identity drift is associated with the gradual and tacit loss of the salience of official claims for strategic investments in an organization (Albert & Whetten, 1985), identity adaptation is a periodic renegotiation of meanings but with unchanged official claims from the organization (Gioia et al., 2000). Furthermore, an organization can develop multiple organizational identities, which should be carefully managed, especially if they become problematic for a firm's strategic operations (Pratt & Foreman, 2000). These multiple identities can develop as the result of a "construed external image" where there is a disconnect between how the members of an organization perceive their organization with how they think outsiders perceive the organization (Dutton & Dukerich, 1991; Gioia et al., 2000). These discrepancies can emerge from an organization's media accounts, from client feedback on the organization, or simply from organizational

members interacting with the community within which the organization resides (Rindova & Fombrun, 1998). Another type of discrepancy in organizational identity is temporal identity discrepancy, where organizational members recognize a discrepancy between the organization's current identity and claims of what the organization would like to be in the future (Corley, 2004).

## **Organizational Structure and Knowledge Management of Consultancy Firms**

### *Consulting Firms as Knowledge-Intensive*

Scholarly literature directly addressing contracts between consultants and higher education institutions in the United States is scarce (McClure, 2017) and research on the role of education consultants in K-12 districts in the U.S. is even less prevalent. However, there is a body of emerging research on the trend towards increased privatization for public educational systems that are adopting operational norms associated with private enterprises, such as thinking of students and parents as consumers, aggressively marketing institutional brands, outsourcing and contracting out administrative services, commercializing research, and minimizing payroll expenditures (Berman, 2012; Gabriel & Lester, 2011; Schrecker, 2010; Slaughter & Rhoades, 2004). These efforts are all motivated by educational accountability being increasingly based on performance measures like graduation rates, learning outcomes, and job placement rates since the 1990s that many educational organizations have navigated through the support of a management consultant company (McClure, 2017).

Management consulting companies are commonly discussed as the archetype of knowledge-intensive firms (Alvesson, 1995; Starbuck, 1992), and within their organizational structures, consultants are often viewed as knowledge brokers between their client organizations (Bessant & Rush, 1995). The systems and resources that exist within a management consulting

firm are dependent on the type of knowledge the firm interacts with most, rooted in two different theoretical conceptualizations of knowledge (Hansen et al, 1999). One perspective conceptualizes knowledge as theory, which assumes that knowledge can be detached from a specific actor and situation and made easily available to others by means of written or spoken language. This view of knowledge also emphasizes the importance of abstract knowledge or general truths that can exist beyond a specific situation (Dunford, 2000). An alternative perspective views knowledge as practice, where abstract and articulate knowledge is always applied in a specific situation and requires a 'knowing subject' who can translate (Czarniawska & Joerges, 1996). A limited number of efforts have been made to unite these approaches and advocate for using both knowledge as theory and practice based on contextual realities (Werr & Stjernberg, 2003). Hansen et al. (1999) describe a contingency approach to explain which perspective on knowledge is most appropriate for managing an organization's knowledge. They argue that viewing knowledge as theory is appropriate in organizations that work with fairly standardized and repetitive tasks, where knowledge can be articulated, stored, and disseminated through a codification strategy. Viewing knowledge as practice is more appropriate in organizations focused on original and creative problem-solving, where the generation of new knowledge is prioritized over the reuse of knowledge through a personalized strategy for knowledge management.

Organizational knowledge can be further identified as either explicit (also referred to as tangible or articulate) or tacit knowledge, where explicit knowledge refers to a structured set of information that can be recognized, stored, and shared, and tacit knowledge refers to information gained through relationships and experiences. Similar to a proposed combined approach for knowledge as theory and practice, Hanson and Haas (2001) argue that explicit and tacit

knowledge may be viewed as complementary in the sense that knowledge transferred by personal means improves consultants' quality of work output, whereas codified knowledge mainly increases work efficiency. In turn, the knowledge management spiral circulates knowledge from tacit to explicit and through reflection creates new tacit knowledge (Nonaka & Takeuchi, 1995). In a knowledge management study of several management consulting firms that served institutions of higher education, Werr and Stjernberg (2003) found that management consulting companies did not treat their companies' methods (explicit knowledge) and their own and colleagues' (mostly tacit) experiences as separate entities; rather, explicit knowledge and tacit knowledge were described as two distinct aspects of the firm's knowledge base. Through their study of five large management consulting firms in the U.S., they highlighted the importance of direct sharing of both explicit and tacit knowledge across individual consultants and for the creation of shared experience in consulting assignment (Werr & Stjernberg, 2003).

### *Consulting Firm Structure*

Consulting organizations are often differentiated in terms of their structures and how they communicate their value proposition to prospective clients. Traditionally, consulting began with the concept of an expert giving advice based on knowledge or experience, also known as content-related consulting that involves advertising activities, direct information and knowledge transfer, as well as making suggestions for alternative actions (Kubr, 2002). This form of consulting evolved to include another form that shifted from advising to enabling, known as process consulting where the goal is to enable clients to solve problems and take decisions independently by making underlying processes and structures transparent and by facilitating their reflections (Broom & Smith, 1978; Grunig et al., 2002; Kubr, 2002).

Over time, researchers have observed that management consulting firms have generally evolved to prioritize more corporate and managerial modes of operation (Hinnings, 2005; Kipping & Kirkpatrick, 2013) with notable exceptions in firms that employ fewer consultants (Kennedy Information, 2003). Smaller consultancies increasingly adopt principles of the entrepreneurial adhocracy that values expert human capital above bureaucratic reporting lines (Lowendahl, 2005). Overall, the increased diversity of consulting firms in the field has led to increased diversity in organizational models, with no single model being dominant or fully institutionalized beyond the “one firm” partnership model (McKenna, 2006).

### *Virtual Consulting Firms*

Where there is a premium on human capital, there has also been the increased use of virtual team structures to give the firm agility to leverage the human knowledge and resources that older structures make difficult to use effectively and creatively (Fisher & Fisher, 1998; Bell & Elkins, 2004). Lipnack & Stamps (1997) offer a broad definition and simple system model of a virtual team as “a group of people who interact through interdependent tasks guided by a common purpose, that works across space, time, and organizational boundaries with links strengthened by webs of communication technologies.” Virtual teams can be advantageous in allowing a firm to respond quickly to competitive pressures or customers changing needs, and team composition can be engineered to ensure a team possesses the right combination of skills for a particular project (Grenier & Metes, 1995; Townsend et al., 1998). However, virtual teams face significant challenges in organization and communication. In virtual teams, the inability to frequently meet face-to-face, the temporal and geographic dispersion, and the significant reliance on communication technologies creates additional obstacles to effective communication, potentially damaging team effectiveness (Due to the ad hoc nature of these teams, group

members who are unfamiliar with each other may have gaps in language norms or may lack shared patterns and routines for divvying tasks, coordinating work, handling conflict, and formulating rules, which reinforces the importance of alignment in training and knowledge management systems for virtual teams (Cascio, 2000; Suchan & Hayzak, 2001).

### *Knowledge Transfer and Management on Virtual Teams*

In the literature, knowledge transfer is characterized as the “process where a complex, casually ambiguous set of routines is recreated and maintained in a new setting” (Szulanski, 2000). This definition has also evolved to be seen as a process through which one unit (group, department, or division) is affected by the experience of another (Argote & Ingram, 2000).

Szulanski goes on to suggest that knowledge transfers within an organization are laborious, time consuming, and difficult and may become even more daunting in situations where knowledge is being transferred across time and space, such as in virtual teams (Szulanski, 2000; Sarker et al., 2005). This is similarly acknowledged in Tagliaventi and Mattarelli’s work that asserts a functionally segmented structure like that of a virtual team can inhibit knowledge sharing across functions and communities of practice (Tagliaventi & Mattarelli, 2006). The transfer of knowledge on a virtual team can potentially be supported by strong leadership, effective communication systems and technology, and potentially most importantly, time to reflect and internalize new knowledge, particularly on dispersed virtual teams (Davenport, 2001).

Ultimately, team dynamics dictate how successfully knowledge transfers occur and how firm knowledge is managed and preserved over time. Hansen (1999) found that strong or direct ties between business unit subgroups facilitated the transfer of complex, tacit knowledge, whereas weak or indirect ties between business units help with the search for explicit, less complex knowledge. A lack of direct ties between business units slowed down the completion



time of projects involving the transfer of complex knowledge. Furthermore, change and leadership transitions impact a firm's ability to successfully manage its proprietary knowledge. Without codified systems and structures for knowledge management on a continuous basis- particularly in firms that rely on personalized strategies and services-an organization misses the critical relationships that departing employees take with them and can sustain long-term damage to organizational networks (Parise et al., 2006).

### **Organizational Coordination**

In general, coordination represents the degree of functional articulation and unity of effort between different entities in an organization (Georgopoulos & Mann, 1962) and the extent to which the work activities of organizational members are logically consistent and coherent (Cheng, 1983). In a well-coordinated organization, work activities are complementary and directed towards a common goal without duplication or fragmentation of effort (Cheng, 1983). When this coordination is applied to the level of an individual team within an organization, this can refer to how organized a team is in carrying out its mission (Janz et al., 1997). Organizational coordination is not a rigid alignment of structures, processes, and rules, but a dynamic, forming and reforming of social practices over time (Honig & Hatch, 2004; Jarzabkowski et al., 2012). When these practices are coherent, the result is improved organizational outcomes, such as shared understandings about the sequence of tasks, collective and individual accountabilities, and agreement around quality outcomes. The coordination of new improvement strategies often occurs simultaneously by enacting existing mechanisms and generating new ones that better fit with the strategy (Jarzabkowski & Feldman, 2012).

Coordination would not be possible without effective practices for knowledge transfer and management, as alignment in communication is the basis of organizational coordination (Gulati et al., 2012; Briscoe & Rogan, 2016). Initially, Sobrero & Schrader (1998) distinguished between contractual and procedural coordination that informed coordination research that came later. They defined contractual coordination as the “mutual exchange of rights among parties” and procedural coordination as “the mutual exchange of information among parties” (Sobrero & Schrader, 1998). This definition of procedural coordination is most in line with how organizations tend to conceptualize how information is shared and transferred to achieve common organizational goals within and across teams and remains an implicit aspect of coordination literature (Castaner & Nuno, 2020).

Communication structures within organizations have evolved rapidly as internal systems have adapted to changing work environments, such as the integration of teams working and communicating virtually. In 2010 in what came to be known as the Stockholm Accords, more than 1,000 public relations and communications professionals conceptualized the communicative organization as one that “requires timely information, knowledge and understanding of economic, social, environmental, and legal developments as well as of its stakeholders’ expectations” (Stockholm Accords, 2010). The proximity between organizational employees and their clients has made externally facing organizational communication efforts synonymous with branding strategies. Employees must have a thorough understanding of their employer’s strategies and values, of how their work fits into the bigger picture, and of how to communicate accordingly (Heide & Simonsson, 2011). Therefore, everyone in the organization needs to be able to communicate deep understanding of all aspects of the organization’s work effectively (Tench, Verhoeven, & Zerfass, 2009).

The structure of a consulting organization determines how it can continuously reinforce and shape its identity and execute essential communication functions both internally and externally. For internal teams within a consultancy to align on strategies and coordinate current work, clear systems and processes for transferring internal knowledge are essential to be able to project who they are and the services they provide to current and future clients.

## Conceptual Framework

The research presented in our review of the literature supported the definition of key variables and the relationships among them.

### *Key Conceptualizations*

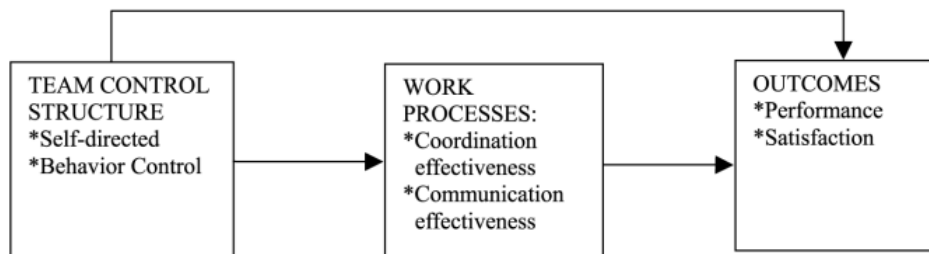
<b>Concept</b>	<b>Definition</b>
Organizational identity	The concept of organizational identity was originally introduced as the attributes of an organization that members perceive as central, enduring, and distinctive (Albert & Whetten, 1985) that generally answers the question, “Who are we as an organization?” (Gioia, 1998; Stimpert et al., 1998).
Knowledge	Information processed by individuals including ideas, facts, expertise, and judgments relevant for individual, team, and organizational performance (Alavi & Leidner, 2001; Bartol & Srivastava, 2002)
Explicit Knowledge	A structured set of documented, public information that can be recognized, stored, and shared (Nonaka & Takeuchi, 1995)
Tacit Knowledge	Information is gained through human perceptions, behaviors, relationships and experiences (Nonaka & Takeuchi, 1995)
Knowledge Transfer	The movement of knowledge between different units, divisions, or organizations rather than individuals” (Szulanski, 2000).
Knowledge Management	Knowledge management (KM) as a term has theoretical roots in intellectual capital (Roos et al., 1997) which refers to all monetary and non-physical resources that are fully or partially controlled by the organization and contribute to the organization’s value creation. Broadly, knowledge management has come to refer to how organizations design systems and processes to store this intellectual capital.
Coordination	The degree of functional articulation and unity of effort between different entities in an organization (Georgopoulos & Mann, 1962)

Our literature review also initially highlighted several conceptual models for communication in virtual organizations, knowledge management systems, and social network analysis as applied to communications, which informed our final conceptual framework for this project.

### **Virtual Team Structure and Communications**

Literature on virtual teams reflected the importance of organizational structure on ultimate team performance. Piccoli, Powel, and Ives (2004) found that employees on self-directed virtual teams reported higher levels of satisfaction and greater outputs in performance than virtual teams that were tightly controlled.

*Figure 1: Conceptual Model, Focus on Structure*

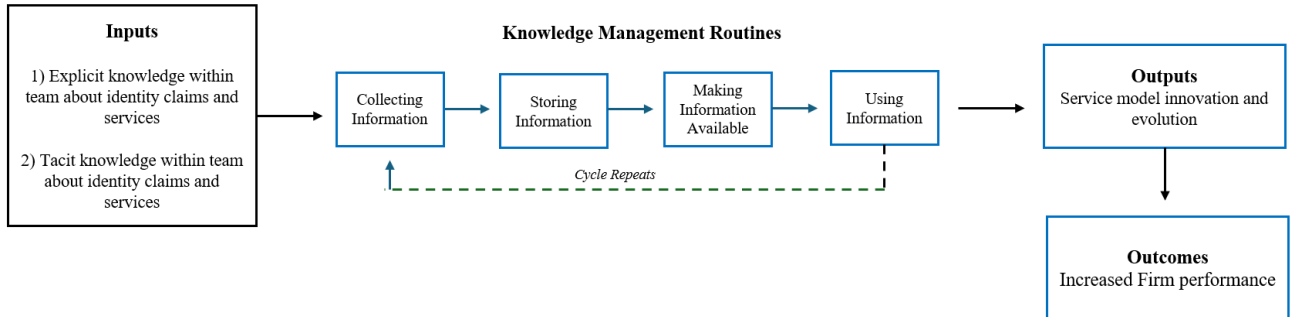


**Source:** Piccoli, Powel & Ives (2004)

### **Organizational Knowledge Management**

The literature on knowledge management emphasizes the importance of systems that support effective knowledge collection, storage, and transfer within a team.

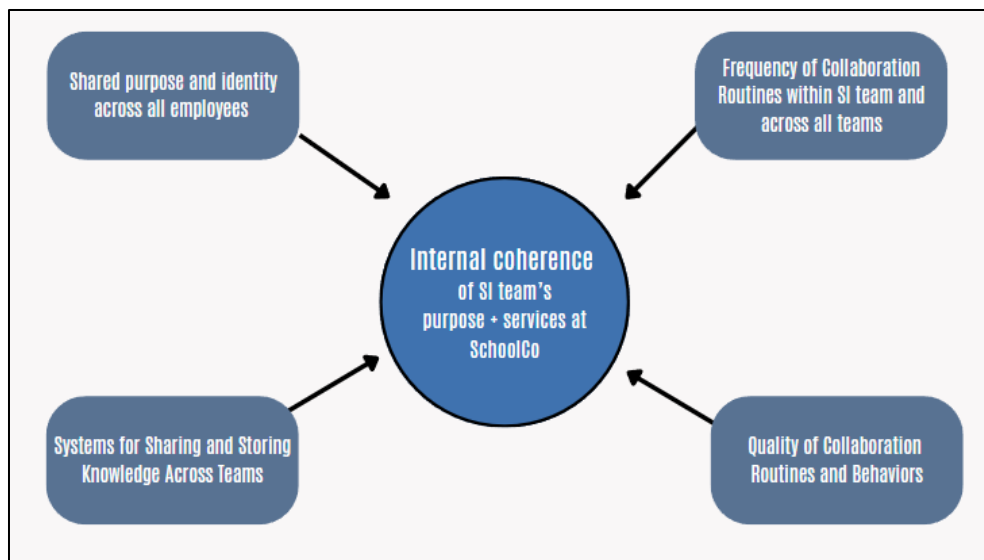
Figure 2: Conceptual Model, Focus on Knowledge Management Systems



Source: Darroch (2005)

While these models included many of the essential elements in our key conceptualizations, they explicitly focus on outputs and outcomes (i.e., firm performance), whereas our project focused on inputs for SchoolCo’s school improvement team. As a result, using literature and our survey instrument, we leveraged the following conceptual framework for our quality improvement inquiry:

Figure 3: Project Conceptual Framework



## **Project Questions**

To better understand how the SchoolCo school improvement team communicates their purpose and aligns on their service model internally, we asked the following project questions:

1. How aligned are the members of the SchoolCo school improvement team in their understanding and articulation of their purpose and service model?
2. How aligned are other teams within SchoolCo in their understanding and articulation of the school improvement team's purpose and service model?

## **Project Design**

The purpose of this project is to investigate the level of alignment within the school improvement team at SchoolCo in terms of individual team members' understanding of their purpose and services, as well as the understanding across other SchoolCo teams about the services the SI team provides to clients. This capstone project aims to provide the school improvement team at SchoolCo with a deeper understanding of their internal systems for communication and coordination of strategic work and provide targeted recommendations based on findings. The results of this project can be used for organizational improvement purposes at SchoolCo moving forward as their new CEO assumes their role in Spring 2024 and team leaders seek to proactively reflect upon and refine their service model. The unit of analysis is the SchoolCo employee, and the analysis explores the degree of alignment in school improvement services knowledge and how changes in existing knowledge are communicated internally.

### *Participant Recruitment and Sample*

The data for this project was obtained through an anonymous online employee survey and voluntary focus groups. The participants for both the survey and focus groups were

SchoolCo employees on the school improvement team, the advancement team, and the marketing, research, and communications team. As doctoral students at Vanderbilt University, we administered the survey directly to SchoolCo employees. A key leader within SchoolCo supported the administration of the survey with a personal message to SchoolCo employees. Our doctoral student team had direct access to survey results upon completion.

### *Survey Data Collection*

A total of 45 SchoolCo employees representing the three teams within the organization were invited by email to participate: one survey designed for the school improvement team and one survey for non-school improvement team members. The school improvement team survey was sent to 28 employees, and the non-school improvement team survey was sent to 17 employees. Our team used Qualtrics to administer each group-specific survey.

Employees in both respondent groups received a pre-survey email to encourage candid responses and to assure participants of the confidentiality of their responses. This email communication was written by the doctoral student team administering the survey. The email was sent from a SchoolCo leader to introduce the partnership with the Learning and Leadership in Organizations program at Vanderbilt University and ensure prospective participants would receive the information. Participants were informed that the survey would take about 15 minutes to complete and that participation was voluntary. At the conclusion of the survey, SchoolCo agreed to share only aggregate data with teams to implement improvements in organizational communication and coordination.

The doctoral student team sent a follow-up email to the identified participants at SchoolCo with the survey link and recommended timeline for completing the survey. For each respondent group, the survey tool was located on a secure cloud-based survey platform that

could be used by any internet-connected device to capture responses. The survey window was originally communicated to be for two weeks beginning April 1, 2024. Two email reminders were provided before the survey window closed.

In the final week of the survey window, SchoolCo communicated an unusual organizational disruption to survey collection that necessitated a premature closure of the survey window. 17 SchoolCo employees were unexpectedly laid off from their full-time positions effective immediately due to organizational budget cuts. Senior leaders were not given advanced warning of these layoffs. Our doctoral team ensured that no survey response was collected after the news of the layoffs was shared with the employees impacted. SchoolCo leaders confirmed that 7 respondents who received our school improvement team survey were laid off, and 10 respondents who received our non-school improvement team survey were laid off.

#### *Contextualized Survey Response Rates*

Our surveys were administered anonymously; therefore, with the change in total respondents due to layoffs, there is no way to measure our response rate with certainty. In total, we received 17 out of 28 responses to the school improvement team survey and 8 out of 17 responses to the non-school improvement team survey. This translates to a response rate of 61% for the school improvement survey and a response rate of 47% for the non-school improvement team survey. However, for the school improvement team, there were 7 out of 28 potential respondents impacted by the layoffs, and for the group of non-school improvement teams, there were 10 out of 17 potential respondents impacted by the layoffs. If we assume that all school improvement team employees who were laid off were non-respondents, then our response rate for the school improvement team survey was 17 out of 21, or 81%. So, we know our response rate for the school improvement team is between 61% and 81% given the impact of the layoffs.



Similarly, with 10 out of 17 non-school improvement team employees in our sample being impacted by layoffs, it is certain that at least one of the respondents was laid off. The response rate range for this group is between 47% and 114% (8 responses with 7 employees remaining). For reporting purposes, we have used the lower response rates in our data analysis.

### *Focus Group Data Collection*

In the first three weeks of May, our doctoral team hosted three optional focus groups on different days and times with SchoolCo employees from the original survey respondent sample who had not been impacted by the layoffs earlier in the month. Focus group sessions were conducted virtually on Zoom and scheduled for the duration of thirty minutes, and initial questions were aligned to the open-ended questions from the survey instrument with the intent to collect additional commentary on what employees see as SchoolCo's strengths and needs as related to understanding school improvement values and services. Participants were invited to attend these sessions by email from our organizational liaison at SchoolCo. Participation in these focus group sessions was highly encouraged but ultimately optional and voluntary. Non-school improvement team members were invited to two different days and times, and school improvement team members were invited to one day and time that aligned with an existing team meeting. In the first focus group for non-school improvement team members, there were 6 participants. In the second focus group for non-school improvement team members, there were 5 participants. In the focus group for school improvement team members, there were 2 participants. The focus group sessions were not recorded on video, but consent was obtained for audio recording for our own notes to refer back to and use in qualitative coding transcription.

### *Data Instruments*

The survey instrument was adapted from the instrument used by Brewster, Tan, & Yuan (2019), which was created to measure collaboration among healthcare and social services organizations. Any modifications were created for the purpose of adaptation to a new organizational context. The survey items included 10 questions chosen to assess three key variables: 1) the current state of understanding and alignment on the school improvement team's identity within SchoolCo, 2) how often collaboration activities occur within the school improvement team and between the school improvement team and other units, and 3) how school improvement service knowledge is managed and coordinated within the school improvement team and across the organization. There was one additional, optional item that asked a demographic question about length of tenure at SchoolCo with range options (0-3 years, 4-6 years, 7-10 years, and 10+ years). The survey instrument is included in Appendix C.

The team identity measure contained two questions, which asked, "What is the purpose of the SchoolCo School Improvement team?" and "What are the most important elements of SchoolCo's school improvement services?". The collaboration activity measure was comprised of three matrix table items. Finally, the last five survey items assessed coordination and knowledge management (Table 1). The order of the survey items was partially determined by the original survey instrument in Brewster, Tan, & Yuan (2019) but the design was intended to guide participants from responding to items focused on frequency of routines at the beginning to shift towards reflecting on the quality of process that contributed to aligned understanding of the purpose for the school improvement team and services they offer clients.

The measures for organizational identity and knowledge management were more open-ended in design while the measure of organizational collaboration had more interval measures and Likert scales on the survey instrument. The item phrasing and order were identical on both

surveys for each respective group, but analysis was conducted on each survey separately to account for the two distinct participant samples. Question 1 on the “current state” frequency of collaboration routines was evaluated using a 6-point Likert scale ranging 1=Daily to 6=Never. 12 out of 17 respondents on the school improvement team completed all item responses on the matrix table, and 6 out of 8 respondents on the non-school improvement team completed all item responses on the matrix table. Question 2 on the “ideal state” of collaboration routine frequency was evaluated using a 4-point Likert scale ranging from 1=Never to 4=Consistently and 12 out of 17 respondents. 12 out of 17 respondents on the school improvement team completed all item responses on the matrix table, and 6 out of 8 respondents on the non-school improvement team completed all item responses on the matrix table. The matrix table for question 3, which asked participants to evaluate statements about collaboration on the school improvement team was evaluated using a 5-point Likert scale ranging from 1=Strongly Agree to 5=Do Not Have Enough Experience to Rate. 11 out of 17 respondents on the school improvement team completed all item responses on the matrix table and 6 out of 8 respondents on the non-school improvement team completed all item responses on the matrix table. For this measure of organizational collaboration, Cronbach’s alpha was used to establish internal consistency of the items across the measure in survey Questions 1-3. For the school improvement survey, the Cronbach alpha scores for Question 1, 2, and 3 were 0.95, 0.97, and 0.98 respectively, which are considered excellent by the accepted convention of being above 0.70 and as close to 1 as possible (Cronbach, 1951). The Cronbach alpha scores for the non-school improvement team survey were similar in a score of 0.97 for question 1, 0.99 for question 2, and 0.97 for question 3 (Appendix A). Although within the range of 0-1, this high value can also indicate some degree of redundancy across several items in the matrix table, which is to be expected in this adapted

survey instrument where items measuring collaboration routines and behaviors were closely related within SchoolCo’s organizational context.

Focus group questions were aligned to the survey instrument as data from the focus groups would be analyzed separately from the survey results. Participants were first invited to describe the purpose of the school improvement team and describe what it feels like to collaborate with members of the school improvement team. Secondly, they were asked to reflect on the evolution of the school improvement team’s purpose and services during their time within the organization. Finally, participants were asked to share what they were most excited about regarding school improvement services in the next 1-3 years as well as what made them nervous or concerned (Table 1).

*Table 1: Survey and Focus Group Items*

<b>Conceptualizations</b>	<b>Survey Questions</b>	<b>Focus Group Questions</b>
Organizational identity	Question 6: What is the purpose of the SchoolCo school improvement team?  Question 7: What are the most important elements of SchoolCo’s school improvement services?	Question 1: How would you describe the purpose of the school improvement team?
Organizational Collaboration	Question 1, 2 and 3 Matrix Tables with Likert Scales	Question 2: What first comes to mind when you reflect on collaboration with members of the school improvement team?  Question 3: As you think about collaboration with this team over the next 1-3 years, what excites you? Where do you see opportunities for improvement?
Knowledge Management and Coordination	Question 4: How would you rate your level of understanding of school improvement services based on your experience and perception?  Question 5: Follow up based on response to Question 4: A. If you	Question 4: During your time at SchoolCo, what changes have you observed for the school improvement team and services?

	<p>selected a rating of 4 or 5, explain what you believe contributes to your strong understanding of school improvement services. B. If you selected a rating of 0, 1, or 2, explain what you believe contributes to your limited understanding of school improvement services. C. If you selected a rating of 3, explain what you feel prevented you from selecting a 4 or 5.</p> <p>Question 8: What should all school improvement clients gain from their partnership experience? What are the most valuable outcomes for SchoolCo school improvement clients?</p> <p>Question 9: Where do you see an opportunity to strengthen the impact of the school improvement team’s work with clients?</p> <p>Question 10: Where do you see an opportunity for improved alignment and coherence between the work of the school improvement team and other programs/initiatives within SchoolCo?</p>	<p>Question 5: How does the school improvement team coordinate their work internally?</p>
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*Data Analysis*

Our data included 17 surveys from members of the school improvement team and 8 surveys from non-school improvement team members (a total of 25 completed surveys), in addition to commentary from 13 individuals who attended focus group sessions in May 2024 (12 from non-school improvement teams and 2 from the school improvement team). We did not need to exclude any full survey submissions, as all were collected before organizational layoffs at SchoolCo. On the school improvement survey, 12 out of 17 respondents completed the full matrix tables on Questions 1-3; on the non-school improvement team survey, 6 out of 8 respondents completed the full matrix tables on Questions 1-3. All 17 school improvement

survey respondents responded to all remaining items, and all 8 non-school improvement team survey respondents responded to all remaining items. Incomplete matrix table responses were excluded from our statistical analysis. The only demographic question asked was the number of years the respondent had been employed by SchoolCo, with options ranging in 3-year intervals and one option for 10+ years. On the school improvement survey, 11 out of 17 respondents answered this optional question; on the non-school improvement survey, 5 out of 8 respondents answered this optional question.

For quantitative survey items measuring collaboration, exploratory factor analysis was used to understand collaboration routines and perceptions about team collaboration both within and outside the school improvement team to better illuminate patterns in alignment or misalignment of team knowledge. Though our survey was based on an existing survey instrument (Brewster et al., 2019), we used an exploratory factor analysis in this project because significant adaptations in scale items were made for this organizational context.

For open-ended survey items and focus group responses, the commentary was inductively coded for emergent themes, with a specific focus on the alignment of knowledge about the school improvement team's identity and the services it offers. We used Qualtrics and XLSTAT for our quantitative analysis and NVivo 14 for our qualitative analysis, as both are provided through Lumivero.

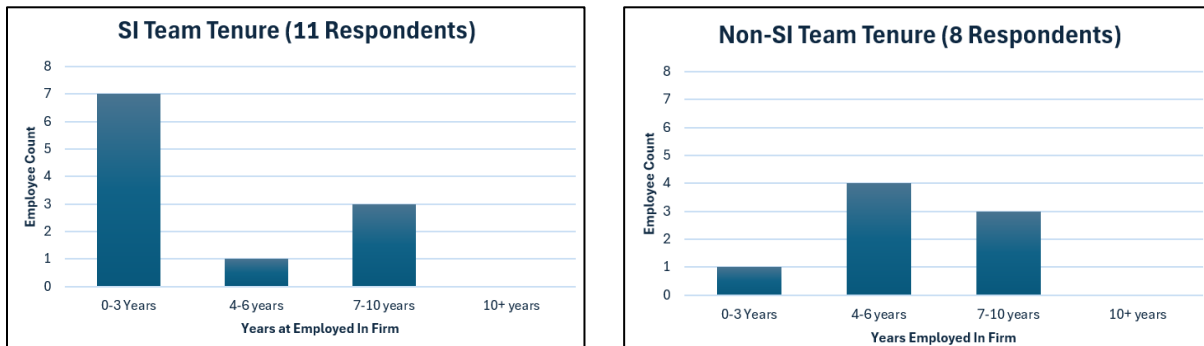
## **Findings**

### Survey Instrument

#### *Length of Organizational Tenure*

Survey results were analyzed for the school improvement team respondents and the non-school improvement team respondents. There was one optional demographic question at the end of the survey that asked about the amount of time they had been employed by SchoolCo. 11 out of 17 individuals responded to this question on the school improvement team survey and 8 out of 8 respondents responded on the non-school improvement team survey (See Figure 4). There was no employee who participated in the survey for either group who had been employed by the organization for more than 10 years. While the total number of individuals surveyed had been with SchoolCo for between 7-10 years, more individuals on the school improvement team were in the 0-3 year range and more individuals in the non-school improvement team respondent group were in the 4-6 year range of employment.

*Figure 4: Tenure at SchoolCo*



### *School Improvement Team Identity*

Open-ended survey responses were inductively coded for emergent themes to gauge the level of alignment between the school improvement team within SchoolCo and employees on teams outside of the school improvement team. Question 6 on the survey instrument asked for employee perception of the overall purpose of the school improvement team. Most respondents on the school improvement team referenced “schools” or “school communities” as clients and “equitable access” was the second shared term across more than three individual responses. For

employees outside of the school improvement team, emergent themes based on terminology used in responses were “school”, “school districts”, “improve school functions”, and a mention of “equity audits” across more than four individual responses.

Question 7 asked participants about the most important aspects of the school improvement service model for SchoolCo overall. While there was a range in responses for the school improvement team, more than three responses referenced “trust” with clients. Additionally, two responses both referenced their data-driven approach to consulting with clients. For non-school improvement team responses, there were no shared references or themes that focused on a common outcome of school improvement work.

Question 8 asked respondents what clients should walk away from a school improvement contract with to gauge alignment in expected outcomes from service delivery. School improvement team members shared common mentions of “improvement” and “partnership” while non-school improvement team members had no emergent themes based on shared response criteria. Each response from non-school improvement team employees not only referenced disparate outcomes but there was a wider variance on those targeted by school improvement services (i.e. “students” vs. “district leaders”).

All participants were asked to rate a self-reported level of understanding of school improvement services based on their own perception, experience, and role within the firm (see Table 2) and explain what they believed contributed to the level of understanding they selected (see Table 3).

*Table 2: Question 4 Item Analysis on Survey Instrument*

Question 4: How would you rate your level of understanding of school improvement services based on your experience and perception?
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Scale Option	School Improvement Team Survey (n=11)	Non-School Improvement Team (n=5)
0: No Understanding	0%	0%
1: Extremely Limited Understanding	0%	0%
2: Limited Understanding	0%	40%
3: Moderate Understanding	27%	20%
4: Strong Understanding	55%	40%
5: Extremely Strong Understanding	18%	0%

Table 3: Question 4 Explanation by Respondent Choice

Respondent Explanation for Question 4 Rating by Response	
Rating of 0, 1, or 2	<ul style="list-style-type: none"> <li>“I think I have an overarching understanding of each of our services based on knowing and working with the team on the service descriptions, reviewing proposals, and reviewing follow-up reports from the research team. I can't speak to how the team actually works, either with clients or with each other, on a day-to-day basis”</li> </ul>
Rating of 3	<ul style="list-style-type: none"> <li>“There is not an emphasis at SchoolCo to meet to share what they are doing. We hear about some things that are on-going at quarterly meetings and occasionally in the bi-weekly Leadership Team meetings.”</li> <li>“Not enough experience DOING the work (I do not hold a client-facing role)”</li> <li>“I am aware of the specific services I am responsible for providing. There are services that we provide that I have not had experience with and therefore do not deeply understand.”</li> <li>“Having primarily worked with only one project for my 3+ years at SchoolCo, I have a limited perspective on other projects. I do feel I have more than others due to the amount of collaboration I have with those who lead other projects, but if it wasn't for that, I wouldn't know much about our services besides what we do broadly.”</li> </ul>
Rating of 4 or 5	<ul style="list-style-type: none"> <li>“I collect feedback about SI services from clients.”</li> <li>“I am constantly talking to team members and clients and synthesizing what I've learned.”</li> <li>“I have been at SchoolCo for many years and have supported business development efforts, in which we share about our past and present SI team services.”</li> <li>“Experiential Knowledge”</li> <li>“Overall historical knowledge, length of time I've been part of SI.”</li> <li>“Having been at SchoolCo for nearly 8 years, having worked on nearly every type of service offering we offer (in the field, with clients, delivering the service), having played a role in designing and developing many of the service offerings and frameworks.”</li> </ul>

A theme that emerged from the higher rating explanations was experience gained through tenure and diversity of roles held within the organization during their time conditions that supported

deeper understanding of school improvement services. Lower ratings highlighted a shared area of concern in collaboration between teams and exposure to other ongoing projects and workstreams.

*Organizational Collaboration*

Items on the survey instrument that asked participants about collaboration behaviors, perceptions, and routines on the school improvement team were analyzed quantitatively through factor analysis. Factor analysis on the 18-item scale produced a 1-factor solution, with loading values ranging from 0.62 to 0.95 (Table 4). This factor represented the distinct concept of collaboration through statements about routines and beliefs about the school improvement team at SchoolCo. Complete statistical analysis can be found in Appendix B.

*Table 4: Factor analysis loading for Question 3*

<b>Item</b>	<b>SI Survey F1</b>	<b>Non-SI Survey F1</b>
The SI team works together to align on consistent processes and approaches for clients.	0.820	0.831
Each School improvement team member operates with the same level of expertise on school improvement services offered by the firm	0.920	0.855
School improvement team members engage in regular training and professional development experiences to refine how their services are executed with external clients.	0.895	0.873
School improvement team members use common, shared protocols created by the organization when executing school improvement services with clients.	0.913	0.873
School improvement team members often observe each other in client-facing meetings to learn from and provide feedback to the SI team member facilitating a process for the client.	0.888	0.699
School improvement team works together to fill gaps in service contracts if a team member requires additional expertise or support.	0.940	0.827
School improvement team members usually work with clients on their own and do not often consult other team members on their projects.	0.874	0.890
School improvement team members work towards a common goal.	0.624	0.943

School improvement team members are often in competition with one another.	0.958	0.644
School improvement team members get a lot accomplished by working together.	0.963	0.950
School improvement team members have trusting relationships with each other.	0.890	0.950
School improvement team members have access to centralized organizational resources (e.g., expertise, research, data, case studies, etc.) that all SI team members know how to access.	0.896	0.560
School improvement team members keep each other up to date about broad problems of practice they are observing in client needs and consultation work.	0.919	0.831
School improvement team members often communicate internally about individual client needs.	0.915	0.913
School improvement team members have opportunities to share feedback with leaders on how to improve the services they offer.	0.874	0.866
School improvement team members have trouble communicating with others on the team.	0.955	0.933
School improvement team members prioritize equity in their work with partners.	0.874	0.699
Each School improvement team member can describe how an equity-lens is applied to each service offering.	0.776	0.887

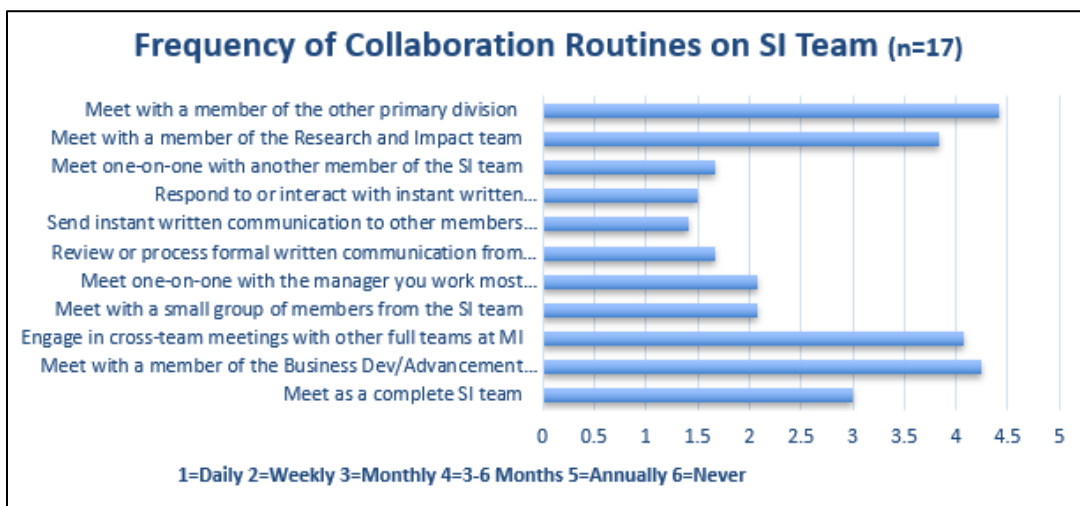
Varimax rotation analysis on Factor 1 for both the school improvement and non-school improvement survey respondent groups confirmed the clustering of all Question 3 items that sought to measure organizational collaboration behaviors and routines, specifically emphasizing the items that reflected strong, positive collaboration routines and behaviors within an organization (trusting team members, having shared systems and resources, and continuously learning and growing from the experiences of others on the team). Negatively worded items were reverse-coded to calculate mean summary scores for all item scales, so that higher scores consistently indicated a more positive direction.

### *Knowledge Management and Coordination*

Question 1 on the survey instrument asked respondents about the frequency of key coordination activities that would allow for opportunities for school improvement knowledge to

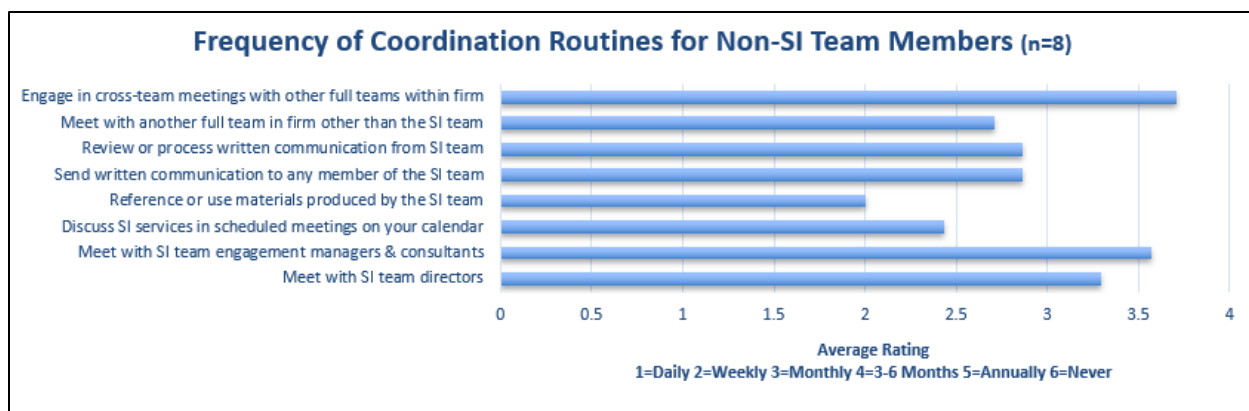
be shared and transferred to other teams within the organization, and Question 2 asked about perceptions of ideal frequency. Responses from members of the school improvement team reflected that they rarely meet with members from other teams but interact with others on the school improvement team with regular frequency (Table 5).

*Table 5: Question 1 responses from school improvement team*



Coordination activities were also found to be less frequent for respondents not on the school improvement team even with other teams within the organization, and most reported meeting with school improvement team members monthly if not more infrequently despite using school improvement services weekly on average.

*Table 6: Question 1 responses from non-school improvement team*



Question 2 on the survey instrument asked respondents’ perceptions of ideal frequencies of coordination activities for the school improvement team. Out of 14 items, members of the school improvement team and members outside of the school improvement team were closely aligned on 7 of the activities and there was greater variance observed on the other 7 activities. School improvement team members placed a more intensive emphasis on reflective conversations, case consultancies, and research on evidence-based practices (Table 7).

*Table 7: Question 2 Coordination Frequency Comparison*

Coordination Activity	Mean SI Team Survey	Mean Non-SI Team Survey
Internal team meetings focused on aligning core Si services and approach	4.83	4.71
Outreach to former clients on follow up and progress monitoring	4.67	4.57
Team learning and development in alignment with service offerings	4.92	4.57
Reflective conversations with managers related to progress towards goals, celebrations, growth, and professional opportunities	5.33	4.43
Cross-departmental meetings for service alignment, innovation, and/or data insights for continuous improvement	4.67	4.57
Problem of practice sharing or case consultancies	4.83	3.43
Individual check ins with SchoolCo team members for collaboration and consultation	5.5	4.43
Project team meetings	5.75	5
Meeting with existing SI clients	5.67	5
Preparing materials for existing SI clients	5.75	5
Conducting presentations for/attending activities related to existing service contracts	5.17	5.14
Attending webinars, networking events/meetings, etc.	4.83	4.43
Research on evidence-based practices for clients	5.25	4.57
Working to engage prospective SI clients	4.83	4.57
<i>Blue shaded cells indicate tighter alignment between SI team and non-SI team. Grey shaded cells indicate larger degree of misalignment between SI team and non-SI team.</i>		

The final questions on the survey instrument were positioned to ask respondents to reflect on the ways the school improvement team can evolve in the future to assess the degree of preliminary alignment on needs and internal recommendations for improvement. A significant number of responses from both respondent groups reflected a strong theme of needing “clear branding” for the work they do in ways that anyone, particularly clients, can understand, as well as focusing resources to be improved quality and focus rather than quantity. One response also called for improved presence and clear messaging on social media channels to “distinguish themselves in a crowded marketplace.” Six responses mentioned the lack of a standardized coaching model and other practices that should be consistent across all individual consultants, which if improved could “scale and replicate impact” as one response noted. Another strong theme was the need for increased cross-functional team structures across more than half of the responses on both the school improvement team survey and the non-school improvement team survey. For these three significant themes, several specific comments from employees were sampled in Table 8.

*Table 8: Sample respondent input from Questions 9 and 10 on survey instrument*

<b>Inductive Themes from Question 9 &amp; 10 Responses</b>	<b>Sample Respondent Input</b>
Narrowed focus and increased standardization of core processes	<ul style="list-style-type: none"> <li>• “I think we need to get more aligned on our approach - how we do the work and what our intended impact is. I think we have a lot of brilliant people with amazing ideas, and there is no centralized place to take them and actualize them because the org is not operating coherently”</li> <li>• “I’m not sure we have a shared understanding of all of the best practices for coaching, consulting, etc. that we use across the team. This could help us scale impact from one strong individual to a full project team and across the full SI team -- and ensure the consistent quality experience that our partners know and appreciate.”</li> </ul>

	<ul style="list-style-type: none"> <li>• “We could codify the best practices across the team when it comes to working with clients.”</li> </ul>
Cross-team collaboration structures and additional training supports	<ul style="list-style-type: none"> <li>• “Right now as I see it there is not coherence of alignment at all. We have two wings of the organization both doing work with schools/in districts, yet it is not clear to me what shared theory of action, delivery approach, or values/philosophies are shared by both teams. We are entirely independent”</li> <li>• “Overall - everything should stem from a shared org-wide strategic plan, and SI strategies align directly. The other team and SI team work has so many opportunities to intersect and mutually-reinforce in a way we haven't always done.”</li> <li>• “More consistent communication from BD team to SI team on the current prospects, RFPs, BD updates.”</li> <li>• “Through collaboration w/other departments to streamline and codify best practices implemented on the school improvement side of the work.”</li> <li>• “The work of SI seems to be designed and created on its own with only limited connection with other departments, namely Research &amp; Impact. However, that alignment still largely seems to be dictated by the SI team. (One of our key committees for another body of work) seems like it would serve as a bridge between that programming and School Improvement, but it also seems to operate very independently from both.”</li> <li>• “More information flow.”</li> <li>• “I think it would be great to just have more communication across teams, particularly when it comes to developing new services, so that everyone is on the same page and understands the what and why. I've often found myself in conversations with non-SI folks who had no idea what I was talking about when I bring up a new service name or acronym.”</li> </ul>
Simplified and accessible service materials to improve understanding	<ul style="list-style-type: none"> <li>• “There are too many services to understand them all and we don't have the capacity to execute them at the highest level. Less should be more and we should focus on doing a few things really well.”</li> <li>• “The SI team has strong content expertise but sometimes they struggle to explain their models and approach to others within the organization.”</li> <li>• “We need to get better at framing/describing our implementation services; the term does not resonate with clients.”</li> <li>• "Off the shelf" services which can be applied to any state (i.e. MTSS best practices)”</li> </ul>

Focus Groups

We had thirteen participants in our three focus group sessions during May 2024, and their commentary was inductively coded for emergent themes using NVivo as our qualitative

transcription and coding software as we had for open-ended items on the survey. The scope of questions was based on our survey instrument and aligned to the established categories of school improvement identity, collaboration routines and how they have evolved over time, and coordination of work particularly looking towards ways to improve systems moving forward.

### *School Improvement Team Identity*

Across all comments, the emphasis on school improvement services being rooted in “context” and above all “customizable” was a consistent theme as participants spoke to their intention to respond to changing needs from school clients. Five out of the thirteen participants referenced school improvement services as being a critical part of the organizational theory of action but did not elaborate further on the theory of action itself or components involved. When asked to describe how it feels to collaborate with members of the school improvement team, there was a clear theme of feeling “connected” and knowing that school improvement team leaders and consultants are personally “invested” in the work of equitable access for schools. Several responses referenced that SchoolCo used to play a stronger role in influencing public policy with several well-known publications and shared this is something that they feel the organization has lost in more recent years. One participant specifically shared that being a strong producer of research “represents an opportunity for us to push innovation in models and redefine our significance as a thought leader in this space.”

### *Organizational Collaboration*

Eight responses shared the sentiment that they feel the ownership is on them and their teams to collaborate with the school improvement team. One respondent specifically stated this “collaboration is about knowledge seeking, just trying to gain insight and visibility into areas that



are not readily available on a website or easily accessible information.” It is significant to note that six of these eight responses also mentioned the impact of the organization moving to a fully virtual structure about 3.5 years ago that disrupted former collaboration routines. Three participants shared excitement that collaboration between their teams and the school improvement team has increased within the last year, and emphasized how essential this was to continue, that it felt “helpful” and “supportive”. Another key emergent theme was the impact of the recent layoffs, as many cited this as a big change for the organization. One participant shared that “they are in reset mode, and vulnerability is key right now as we consider the way forward” while another shared that “changes in teams deeply impact relationships and dynamics.” There was a sentiment of fear and uncertainty across responses that mentioned layoffs, connecting it to the future challenge of how the organization will truly diversify their revenue and attract and keep client contracts as district circumstances are simultaneously changing as well due to federal and state fiscal concerns.

### *Knowledge Management and Coordination*

As participants considered the depth of their own understanding about school improvement services, a key theme emerged from seven participants that school improvement service materials can often be overly complicated and so numerous it can be difficult to keep track of. One participant shared that it is “often hard to translate what they do to a layperson” and several others strongly nodded in agreement with one participant adding that “more than 15 different services is too many to do well with their internal capacity.” The tension between the importance of school improvement team members being a highly credible “knowledge center” and having clear, accessible services that districts will seek them out for support in was a theme across five participants’ commentary throughout the focus groups. There was an overwhelming

desire to “be known for” something in a very “competitive and noisy” market, speculating that at this time of transformation and change, it could be wise to move away from a highly customized approach to one focused on specific outcomes, if only “for a while as they rebuild” as one participant shared.

Several themes from focus group commentary aligned with emergent themes from open-ended items on the survey instrument, namely a desire to narrow the focus of school improvement services and explain their work in more simple, accessible language for both internal and external audiences. A desire for increased opportunities to collaborate also aligned with a key theme from survey data, though focus group commentary provided more data on current fears and challenges for the future given the impact of the layoffs and the succession of a new CEO.

### **Project Questions Findings**

Our area of inquiry in this project focused on two questions for our exploration:

1. How aligned are the members of the SchoolCo school improvement team in their understanding and articulation of their purpose and service model?
2. How aligned are other teams within SchoolCo in their understanding and articulation of the school improvement team’s purpose and service model?

### *School Improvement Team Alignment*

Our findings reflected relatively consistent alignment within the school improvement team in terms of their identity and how they conceptualize key collaboration routines for their service model, as responses reflected consistent cluster trends for those questions both on the

survey and in focus groups. 55% of school improvement respondents shared that they had a strong understanding of their purpose and work, while 27% percent shared that they had a moderate level of understanding and 18% shared that they had an extremely high level of understanding (Table 2). High alignment survey items are included below in Table 9 with some individual outliers in the data, measured by the number of respondents who answered, “strongly agree” or “agree”.

*Table 9: High agreement survey items for SI team collaboration assessment*

Survey Item	Likert Scale	Count
SI team members have trusting relationships with each other.	Strongly Agree	4
	Agree	6
	Disagree	1
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	0

Survey Item	Likert Scale	Count
SI team members get a lot accomplished by working together	Strongly Agree	4
	Agree	5
	Disagree	2
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	0

Survey Item	Likert Scale	Count
SI team members prioritize equity in their work with partners	Strongly Agree	3
	Agree	6
	Disagree	1
	Strongly Disagree	1
	Do Not Have Enough Experience to Rate	0

Survey Item	Likert Scale	Count
SI team members often communicate internally about individual client needs.	Strongly Agree	3
	Agree	6
	Disagree	1
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	1

The data indicates that the school improvement team has a strong culture that prioritizes relationships and working together, and when possible, team members intentionally communicate their needs to other members of the school improvement team. Lower areas of agreement on the survey items converged with qualitative commentary from open-ended

questions and focus groups that indicated a need for stronger internal systems to support coordination efforts, as indicated on lower alignment items in Table 10.

*Table 10: High disagreement survey items for SI team collaboration assessment*

Survey Item	Likert Scale	Count
SI team members have access to centralized organizational resources	Strongly Agree	0
	Agree	5
	Disagree	4
	Strongly Disagree	2
	Do Not Have Enough Experience to Rate	0

Survey Item	Likert Scale	Count
Each SI team member operates with the same level of expertise on school improvement services	Strongly Agree	0
	Agree	1
	Disagree	7
	Strongly Disagree	2
	Do Not Have Enough Experience to Rate	1

Survey Item	Likert Scale	Count
SI team members often observe each other in client-facing meetings to learn	Strongly Agree	0
	Agree	1
	Disagree	5
	Strongly Disagree	4
	Do Not Have Enough Experience to Rate	1

Survey Item	Likert Scale	Count
SI team members engage in regular training and professional development	Strongly Agree	0
	Agree	5
	Disagree	5
	Strongly Disagree	1
	Do Not Have Enough Experience to Rate	0

These results indicated that not all school improvement consultants have the same degree of working knowledge and expertise on their service model, and most respondents felt that team members had limited opportunities to observe other consultants and receive specific training and professional development related to their role. The data also supported a lack of strong internal systems to organize important school improvement service knowledge that can be easily accessed and shared broadly across the organization.

#### *Non-School Improvement Team Alignment*

Findings from the non-school improvement team survey reflected a lack of awareness about internal school improvement team systems and processes, as more than 50% of respondents answered “do not have enough information to rate” for five out of eighteen items on the collaboration index. Overall, 40% of respondents reported a limited level of understanding of school improvement services, 20% reported a moderate level of understanding, and 40% reported a strong level of understanding of the school improvement team. Explanations for the stronger levels of understanding all referenced their length of tenure within the organization or prior experience working on the school improvement team. For comparison purposes, the high agreement indicators from the school improvement team were analyzed again for non-school improvement team responses (Table 11).

*Table 11: Non-school improvement responses on high agreement indicators from SI team*

Survey Item	Likert Scale	Count
SI team members have trusting relationships with each other.	Strongly Agree	2
	Agree	4
	Disagree	0
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	2

Survey Item	Likert Scale	Count
SI team members get a lot accomplished by working together	Strongly Agree	2
	Agree	4
	Disagree	0
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	2

Survey Item	Likert Scale	Count
SI team members prioritize equity in their work with partners	Strongly Agree	2
	Agree	5
	Disagree	0
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	1

Survey Item	Likert Scale	Count
SI team members often communicate internally about individual client needs.	Strongly Agree	1
	Agree	2
	Disagree	0
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	5

The agreement trend remained consistent for these items, though more non-school improvement team members shared that they did not have enough experience to accurately rate more than school improvement team members. We pulled the same indicators that school improvement team members disagreed more on for the purposes of comparison.

*Table 12: Non-school improvement team responses on high disagreement indicators on the collaboration index*

Survey Item	Likert Scale	Count
SI team members have access to centralized organizational resources	Strongly Agree	1
	Agree	3
	Disagree	0
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	3

Survey Item	Likert Scale	Count
Each SI team member operates with the same level of expertise on school improvement services	Strongly Agree	1
	Agree	2
	Disagree	2
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	2

Survey Item	Likert Scale	Count
SI team members often observe each other in client-facing meetings to learn	Strongly Agree	1
	Agree	0
	Disagree	2
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	4

Survey Item	Likert Scale	Count
SI team members engage in regular training and professional development	Strongly Agree	2
	Agree	1
	Disagree	2
	Strongly Disagree	0
	Do Not Have Enough Experience to Rate	2

In some cases, the disagreement trend continued for non-school improvement team responses, but the lack of context potentially impacted how participants responded. Overall, the consistency in results did provide additional data to support some of the findings on the school improvement team's strengths and areas of opportunity and how they execute their service model.

## *Summary*

While we acknowledge the data that indicated strong levels of alignment in the school improvement service model purpose, we focus our findings and recommendations on targeted quality improvement for the organization. The quantitative and qualitative analysis supported three key findings to help increase the depth of understanding of school improvement services across all teams within SchoolCo for improved alignment and coherence.

**Finding 1:** A significant number of responses within the sample of employees expressed concern with the fact that school improvement service materials were overly complex and difficult to easily understand or explain, which is a critical business and marketing activity in attracting prospective clients. The number of school improvement-related services paired with a highly customizable approach left many employees unsure of what made SchoolCo truly unique in the field regarding their competitive advantage with district clients.

**Finding 2:** Commentary from employees from both the school improvement team and other teams within the firm reflected a desire for some practices to be standardized across all consultants and service offerings to be more narrowly focused for clients, particularly during a context of significant internal change and transition. Most respondents did not feel all school improvement team members operated with the same level of expertise due to speculative gaps in hiring, training, and ongoing coaching and mentorship.

**Finding 3:** Multiple quantitative item results and qualitative themes reflected a lack of intentional mechanisms for collaboration across SchoolCo. Many responses reflected the

tendency for consultants to become siloed within a team or project without consistent routines to work with others from other teams to coordinate work and align key strategies in a timely manner.

## **Recommendations**

This mixed methods project created the opportunity for SchoolCo to understand the degree of internal alignment on their school improvement work during an important time in their firm's evolution. In the immediate aftermath of layoffs, team restructuring, and the succession of a new CEO, understanding the alignment of current practices and futuristic projections is essential for leadership and change management practices. This section outlines and elaborates on the recommendations aligned with our three key findings that focused on identifying and aligning key consultancy practices and supporting their execution with enhanced coaching models, improved cross-team collaboration structures, and simplified and accessible client-facing tools that highlight the core competitive advantage of working with SchoolCo consultants.

**Recommendation 1:** Simplify client-facing resources on the service model that emphasize a niched competitive advantage of a SchoolCo partnership.

Our findings reflected that while school improvement consultants are generally perceived as technical experts, there are too many isolated service options for teams within SchoolCo that directly support school improvement services. Several participants shared that the core knowledge the team publishes on their services is sometimes not accessible or easily understood by clients, and a majority of participants felt they needed to narrow the scope of their services to have a clear, marketable competitive advantage when sharing why a client should work with



them over other options. One major success factor for management consulting firms is their ability to clearly define their top core products and services to focus their expertise and reduce ambiguity as they attempt to win contracts (Bronnenmayer, Wirtz, Göttel, 2016). Additionally, considerable work has been conducted in the realm of marketing and branding theory, where branding has been re-conceptualized to not only inform external stakeholders, such as customers, investors, and suppliers, about the values to be associated with the organization; it also potentially instructs and directs organizational members. In this sense, branding can be viewed as a management and leadership practice (Kärreman & Rylander, 2008). This research reinforces the internal signaling within SchoolCo to redesign how they present their services in terms of simple, accessible language and processes, which in turn could support improved understanding and alignment internally within SchoolCo teams.

**Recommendation 2:** Identify and codify key practices with embedded coaching, peer observation, and mentorship support.

Inductively coded themes in our project emphasized the importance of a context-specific, customized approach for school improvement services. While this was a strong point of alignment, respondents also acknowledged a gap in levels of expertise across consultants on the school improvement team, and exploring the root causes of these differences would be an important area of continued inquiry and analysis for SchoolCo. Direct commentary from this project signaled a need for some core practices to be standardized across all consultants for more consistent client experiences, which could be supported with peer observation and cycles of coaching and support. Researchers have found that integrated coaching frameworks can be used intentionally to drive improved outcomes in organizations (Grant, 2014; Shoukry & Cox, 2018; Wang et al., 2022). For SchoolCo, this could allow them the degree of customization for

different district contexts while aligning on core processes and training materials for their consultants in the field executing contracts with partners.

Our findings also reflected limited support for school improvement consultants when they are in the field working with clients, and many employees reported feeling isolated in projects or teams with limited exposure to support or the work of others within the firm. Implementing a system of peer observation and/or in-field observational support could strengthen the consultant's experience in using more systematic tools and processes to drive client outcomes. De Haan and Birch (2021) outlined specific models for consulting supervision, which included a peer-to-peer option and reframed supervision as “an opportunity to step out from the complex dynamics of the work, to renew and widen perspectives, and then to step back in again with increased awareness and resourcefulness, now seen as a regular and necessary prerequisite for sound professional practice rather than emergency crisis intervention” (de Haan & Birch, 2021, p. 224). They go on to outline key advantages for the firm and consultants themselves in this process, namely shared development and accountability, and specifically recommend processes to change supervising coaches for consultants over time.

**Recommendation 3:** Create consistent structures for cross-team collaboration

Qualitative and quantitative project findings both reflected the tendency for employees within SchoolCo to work in silos of workstreams or project contracts, and teams reported that they met with members from other teams very infrequently or haphazardly. Cross et al. (2008) reference the fact that over the past two decades, waves of restructuring have pushed work and coordination to informational networks within and between organizations. This movement has formed the basis of Organizational Network Analysis, also known as Social Network Analysis, which can be used to better understand how knowledge is created, stored, and transferred within

an organization and how individual expertise can play a role. An understanding of Social Network Analysis can be applied to execution teams to build mutual awareness of current work and expertise, form specialized subgroups that can be held together by key brokers, and cultivate external relationships to build capacity and provide teams third-party support and feedback (Cross et al, 2008). SchoolCo transitioned to a virtual operating structure three years ago and their teams have continued to iterate on effective structures and systems for virtual networks. Our team would recommend SchoolCo conduct a network analysis once all restructuring is complete to be able to identify key brokers for school improvement training and investment, as well as prepare to have biweekly cross-team meetings that are standardized at the organizational level for improved communication and strategy alignment.

### **Project Limitations**

This project was conducted at a specific point in time for SchoolCo as an organization where our access was limited to specific points of interaction with employees. As such, it is impossible to claim any causal relationship between the variables. Additionally, as our high Cronbach Alpha score indicated, there may be considerable measurement overlap among variables, particularly on Likert scale matrix tables from the administered survey instrument. This project relied heavily on a pre-existing survey instrument, and subsequent statistical analysis was heavily influenced by the methodology of the original study conducted by Brewster, Tan, and Yuan (2019), though applied to a new context in an education consulting firm. We ultimately decided to use a pre-existing instrument due to time constraints and the fact that we were seeking to measure something extremely specific for our client organization where there were few existing instruments grounded in theory with significant levels of internal consistency and reliability. Given this limitation, we would strongly recommend future research and

development on tools that can support the measurement and calibration of internal knowledge alignment, knowledge sharing and work coordination within organizations.

Another significant limitation in this project is that our client organization, SchoolCo, was a small firm to begin with and then experienced unexpected layoffs to employees initially included in our participant sample during our project's data collection period. While these layoffs did not impact our survey responses, given that we paused our survey collection prior to the news being shared directly with employees, this event did have a significant impact on our efforts to increase the response rate during survey administration and catalyzed our team to pivot to include focus groups to gain additional insights from SchoolCo employees. Additionally, the fact that focus group participants were "survivors" of the layoffs within SchoolCo could also be a limitation in the potential impact this had on participant perspectives and commentary shared.

## **Conclusion**

The goals of this project with SchoolCo were to 1) explore the current state of alignment both within the school improvement team and across other teams on school improvement values and services and 2) generate recommendations that will support the firm as they continue to develop their vision for service design and delivery internally and with clients. At the beginning of this project, SchoolCo leaders were aware they had reached a critical juncture in their organization's journey with the anticipated succession of a new CEO coupled with layers of fiscal and political changes for the school entities they served. They began this project with authentic reflection and curiosity about how they could pivot as an organization to "meet the moment" and respond to a changing landscape of needs while they also focused on their own

internal coordination of work across two large divisions that focused on unique programs in K-12 districts and schools in the United States. They had a hunch that one contributing internal problem could be varying levels of understanding of their service model that could be impacting their ability to attract new clients, but they had little data to support this.

Our review of literature focused on key themes that emerged from our area of inquiry: organizational identity and image projection, consultancy structures, and knowledge management and coordination. During this process we found a pre-existing survey instrument that measured strategic alignment and coordination within a team structure in the health industry (Brewster et al, 2019) and use relevant literature from our established themes to make any slight modifications that would allow our team to meet SchoolCo's needs and desired outcomes. Working collaboratively, we reviewed the instrument and co-designed some of the question additions and methodology in our project design with our SchoolCo leader liaisons that would allow us to focus on this and collect current state data to illuminate the level of alignment in knowledge and coordination of consultant work. Questions focused on individual perceptions about the values and purpose of the school improvement team, the kind of work school improvement consultants should be engaged in and how often, and the quality of collaborative behaviors and systems leveraged by the school improvement team. We were pleased with our instrument's high degree of internal consistency as measured by Cronbach Alpha as well as the fact that our factor analysis loaded one core factor that encompassed our collaboration matrix items.

The unexpected layoffs to almost 30% of their total SchoolCo employees during this project prompted a significant organizational and emotional response for SchoolCo leaders and employees that catalyzed a more intensive climate of pause and reflection. Our project team

responded to this event by honoring and respecting what would be most helpful to their firm and best received by those still navigating the internal changes. We pulled the survey results we had collected and made a pivot to include qualitative commentary from optional focus groups in addition to the open-ended questions in our survey instrument, and received incredibly thoughtful feedback from SchoolCo employees on their understanding of school improvement values and services and where they observed opportunities for quality improvement in both the short term and long term.

The quantitative and qualitative analysis from our survey instrument and focus group responses supported three findings. First, commentary from employees from both the school improvement team and other teams within the firm reflected a desire for some practices to be standardized across all consultants and service offerings to be more narrowly focused for clients. Second, multiple quantitative item results and qualitative themes reflected a lack of intentional linking mechanisms for collaboration across SchoolCo. Third, a significant number of responses within the sample of employees expressed concern with the fact that school improvement service materials were overly complex and difficult to easily understand or explain.

The findings illuminated opportunities for SchoolCo to create and strengthen critical linking mechanisms within and across teams within the firm. Each recommendation is specifically aligned to each of the findings above, but all seek to contribute to more effective enabling systems particularly due to the fact the organization has found itself with an opportunity for design and reimagination. We first recommend that SchoolCo examine their school improvement services and focus their offerings on key components that highlight their unique competitive advantage in the marketplace. Commentary from employees reflected a broad range of internal ideas about what this focus should be, and it is important to note that they will be

looking to new senior leaders for signals about what this should be and why. This is perhaps the most important recommendation as it will enable the success of our second and third recommendations. We also recommend SchoolCo codify a tailored perspective on consulting and coaching practices and couple these efforts with observation and mentorship supports, there will be increased consistency across individual consultants and more opportunities for job-embedded professional development aligned to their core vision for partnership services. We then recommend SchoolCo systematize opportunities for cross-team collaboration that occurs on a regular cadence for information about service developments to be effectively exchanged.

In conclusion, this project found that SchoolCo is an organization with engaged leaders and employees that recognize the cross-roads they stand at and want to forge the best path forward for themselves and the school communities they seek to impact. If they can come together to unite in shared systems and practices and develop their internal alignment, they will be able to continue in their legacy of supporting the transformation of school communities.

## Appendix A: Organizational Collaboration Reliability Statistics

### Summary School Improvement Survey

Question 1 Alpha	0.946199442
Question 2 Alpha	0.974438113
Question 3 Alpha	0.98162689

### Summary Non-School Improvement Survey

Question 1 Alpha	0.976821694
Question 2 Alpha	0.990518222
Question 3 Alpha	0.979955087

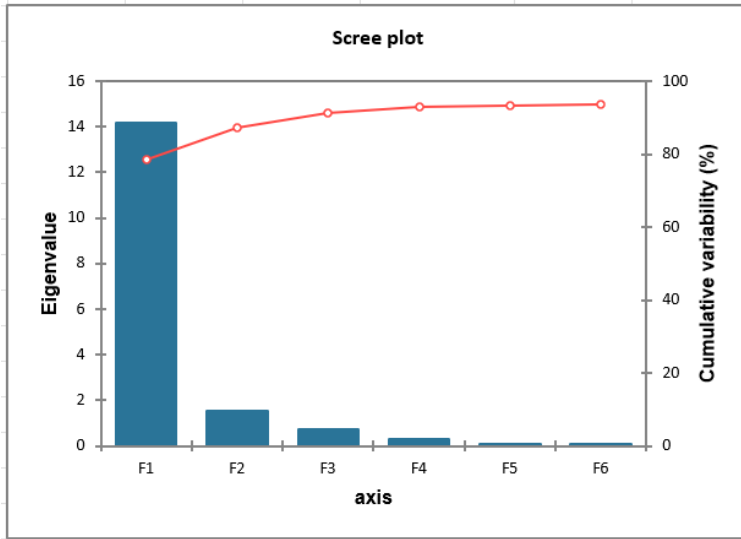
## Appendix B: Factor Analysis Statistics

### School Improvement Team Survey

Summary statistics:

Variable	Observations	Obs. with missing data	Obs. without missing data	Minimum	Maximum	Mean	Std. deviation
The SI team	11	0	11	2.000	4.000	2.273	0.647
SI team m	11	0	11	1.000	3.000	1.818	0.751
SI team m	11	0	11	1.000	3.000	1.727	0.647
SI team m	11	0	11	2.000	4.000	2.727	0.786
SI team m	11	0	11	2.000	4.000	2.636	0.809
SI team m	11	0	11	1.000	5.000	2.091	1.136
SI team m	11	0	11	1.000	3.000	1.909	0.539
SI team m	11	0	11	2.000	3.000	2.818	0.405
SI team m	11	0	11	1.000	4.000	2.000	0.894
Each SI team	11	0	11	2.000	5.000	2.909	0.944
Each SI team	11	0	11	2.000	5.000	3.273	0.786
SI team m	11	0	11	2.000	4.000	2.636	0.674
SI team m	11	0	11	2.000	5.000	2.909	1.136
SI team m	11	0	11	2.000	5.000	3.545	0.934
The SI team	11	0	11	1.000	3.000	1.909	0.539
SI team m	11	0	11	2.000	5.000	3.091	0.831
SI team m	11	0	11	1.000	3.000	1.909	0.539
SI team m	11	0	11	2.000	4.000	3.364	0.674





Factor pattern:

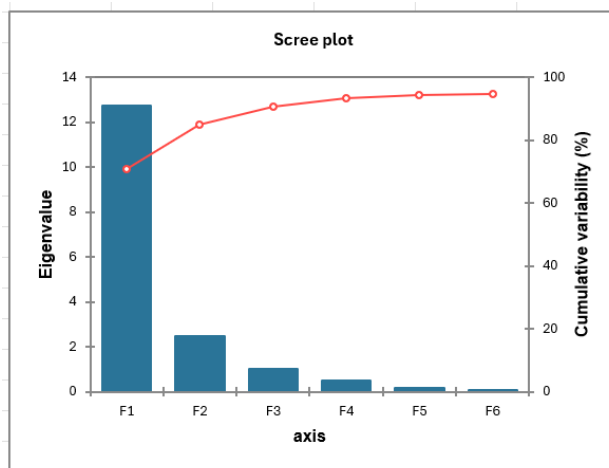
	F1	F2	Initial communality	Final communality	Specific variance
The SI tea	<b>0.820</b>	0.214	1.000	0.718	0.282
SI team m	<b>0.920</b>	0.178	1.000	0.879	0.121
SI team m	<b>0.895</b>	0.002	1.000	0.801	0.199
SI team m	<b>0.913</b>	0.301	1.000	0.924	0.076
SI team m	<b>0.888</b>	0.342	0.962	0.905	0.095
SI team m	<b>0.940</b>	0.029	1.000	0.885	0.115
SI team m	<b>0.874</b>	-0.486	1.000	<b>1.000</b>	<b>0.000</b>
SI team m	<b>0.624</b>	-0.571	1.000	0.715	0.285
SI team m	<b>0.958</b>	0.026	1.000	0.918	0.082
Each SI te	<b>0.963</b>	0.159	1.000	0.953	0.047
Each SI te	<b>0.890</b>	0.037	0.892	0.794	0.206
SI team m	<b>0.896</b>	0.140	1.000	0.822	0.178
SI team m	<b>0.919</b>	0.345	1.000	0.964	0.036
SI team m	<b>0.915</b>	0.162	1.000	0.864	0.136
The SI tea	<b>0.874</b>	-0.486	1.000	<b>1.000</b>	<b>0.000</b>
SI team m	<b>0.955</b>	-0.126	1.000	0.928	0.072
SI team m	<b>0.874</b>	-0.486	1.000	<b>1.000</b>	<b>0.000</b>
SI team m	<b>0.776</b>	0.013	1.000	0.602	0.398

Values in bold correspond for each variable to the factor for which the squared cosine is the largest

## Non-School Improvement Team Survey

Summary statistics:

Variable	Observations	Obs. with missing data	Obs. without missing data	Minimum	Maximum	Mean	Std. deviation
The SI tear	8	0	8	1.000	5.000	2.625	1.506
SI team me	8	0	8	1.000	5.000	2.500	1.604
SI team me	8	0	8	1.000	5.000	3.000	1.690
SI team me	8	0	8	1.000	5.000	3.000	1.690
SI team me	8	0	8	1.000	5.000	4.500	1.414
SI team me	8	0	8	1.000	5.000	4.125	1.642
SI team me	8	0	8	1.000	5.000	2.875	1.808
SI team me	8	0	8	1.000	5.000	3.500	1.690
SI team me	8	0	8	1.000	5.000	2.250	1.165
Each SI tea	8	0	8	1.000	5.000	3.000	1.414
Each SI tea	8	0	8	1.000	5.000	3.000	1.414
SI team me	8	0	8	1.000	3.000	2.125	0.835
SI team me	8	0	8	1.000	5.000	2.625	1.506
SI team me	8	0	8	1.000	5.000	3.750	1.488
The SI tear	8	0	8	1.000	5.000	3.750	1.753
SI team me	8	0	8	1.000	5.000	3.625	1.598
SI team me	8	0	8	1.000	2.000	1.875	0.354
SI team me	8	0	8	1.000	5.000	3.750	1.753



Factor pattern:

	F1	F2	F3	Initial communa lity	Final communa lity	Specific variance
The SI tear	<b>0.831</b>	0.519	0.149	1.000	0.981	0.019
SI team me	<b>0.855</b>	0.443	-0.019	1.000	0.928	0.072
SI team me	<b>0.873</b>	0.236	-0.139	1.000	0.837	0.163
SI team me	<b>0.873</b>	0.236	-0.139	1.000	0.837	0.163
SI team me	<b>0.699</b>	-0.412	0.562	1.000	0.974	0.026
SI team me	<b>0.827</b>	-0.441	0.017	1.000	0.880	0.120
SI team me	<b>0.890</b>	0.196	-0.269	1.000	0.903	0.097
SI team me	<b>0.943</b>	-0.206	-0.255	1.000	0.996	0.004
SI team me	<b>0.644</b>	0.274	0.185	0.526	0.524	0.476
Each SI tea	<b>0.950</b>	0.240	0.041	1.000	0.961	0.039
Each SI tea	<b>0.950</b>	0.240	0.041	1.000	0.961	0.039
SI team me	0.560	<b>-0.765</b>	-0.262	1.000	0.968	0.032
SI team me	<b>0.831</b>	0.519	0.149	1.000	0.981	0.019
SI team me	<b>0.913</b>	-0.174	0.036	1.000	0.865	0.135
The SI tear	<b>0.866</b>	-0.291	-0.138	1.000	0.855	0.145
SI team me	<b>0.933</b>	-0.201	-0.117	1.000	0.924	0.076
SI team me	<b>0.699</b>	-0.412	0.562	1.000	0.974	0.026
SI team me	<b>0.887</b>	-0.334	-0.185	1.000	0.932	0.068

Values in bold correspond for each variable to the factor for which the squared cosine is the largest

## Appendix C: Survey Instruments

### School improvement Team Survey Instrument

#### **Part A: Frequency of Collaboration Routines**

**Question 1:** How often do you engage in the following activities with others within the SchoolCo School improvement Team?

**Answer Scale:** Daily-Weekly-Monthly-Every 3-6 Months-Annually-Never

#### **List of Activities:**

*Definition of “meet” refers to a synchronous meeting either in person or virtually*

Meet as a complete SI team
Meet with a small group of members from the SI team
Meet 1:1 with the manager you work most closely with who directly oversees your SI work
Review or process formal written communication from other members of the school improvement team (emails, handbooks, presentations, etc.)
Send instantaneous written communication to other members of the school improvement team (Examples: texts, teams/slack messages, etc.)
Respond to or interact with instantaneous written communication from other members of the school improvement team (Examples: texts, teams/slack messages, etc.)
Meet 1:1 with another member of the SI team
Meet with a member of the other named division team ( <i>item rephrased to protect anonymity</i> )
Meet with a member of the other named division team ( <i>item rephrased to protect anonymity</i> )
Meet with a member of the business development/advancement team
Engage in cross-team meetings with other full teams at SchoolCo

**Question 2:** As a member of the school improvement team, how often do you feel you should engage in the following activities each week?

**Answer Scale:** 1-Never 2-Rarely 3-Sometimes 4- Consistently

#### **List of Activities:**

Internal team meetings focused on aligning core Si services and approach
Individual check ins with SchoolCo team members for collaboration and consultation
Project team meetings
Meeting with existing SI clients

Preparing materials for existing SI clients
Conducting presentations for/attending activities related to existing service contracts
Attending webinars, networking events/meetings, etc.
Research on evidence-based practices for clients
Working to engage prospective SI clients
Outreach to former clients on follow up and progress monitoring
Team learning and development in alignment with service offerings
Reflective conversations with managers related to progress towards goals, celebrations, growth, and professional opportunities
Cross-departmental meetings for service alignment, innovation, and/or data insights for continuous improvement
Problem of practice sharing or case consultancies

**Part B: Assessment of Collaboration Activities**

**Question 3:** Considering the SI team overall, how would you rate the following statements:

**Answer Scale:** 5-Strongly Agree, 4-Agree, 3-Disagree, 2-Strongly Disagree, 1-Do not have enough experience to rate

**List of Statements:**

The SI team works together to align on consistent processes and approaches for clients.
Each School improvement team member operates with the same level of expertise on school improvement services offered by the firm
School improvement team members engage in regular training and professional development experiences to refine how their services are executed with external clients.
School improvement team members use common, shared protocols created by the organization when executing school improvement services with clients.
School improvement team members often observe each other in client-facing meetings to learn from and provide feedback to the SI team member facilitating a process for the client.
School improvement team works together to fill gaps in service contracts if a team member requires additional expertise or support.
School improvement team members usually work with clients on their own and do not often consult other team members on their projects.
School improvement team members work towards a common goal.
School improvement team members are often in competition with one another.
School improvement team members get a lot accomplished by working together.
School improvement team members have trusting relationships with each other.
School improvement team members have access to centralized organizational resources (e.g., expertise, research, data, case studies, etc.) that all SI team members know how to access.

School improvement team members keep each other up to date about broad problems of practice they are observing in client needs and consultation work.
School improvement team members often communicate internally about individual client needs.
School improvement team members have opportunities to share feedback with leaders on how to improve the services they offer.
School improvement team members have trouble communicating with others on the team.
School improvement team members prioritize equity in their work with partners.
Each school improvement team member can describe how an equity-lens is applied to each service offering.

### **Part C: Knowledge Management and Coordination**

**Question 4:** How would you rate your level of understanding of school improvement services based on your experience and perception?

**Answer Scale:** 0-No understanding 1-Extremely limited understanding 2-Limited understanding 3-Moderate understanding 4-Strong understanding 5-Extremely strong understanding

**Question 5 (Follow Up):**

If you selected a rating of 4 or 5, explain what you believe contributes to your strong understanding of school improvement services.

If you selected a rating of 0, 1, or 2, explain what you believe contributes to your limited understanding of school improvement services.

If you selected a rating of 3, explain what you feel prevented you from selecting a 4 or 5.

**Question 6:** What is the purpose of the SchoolCo school improvement team?

**Question 7:** What are the most important elements of SchoolCo’s school improvement services?

**Question 8:** What should all school improvement clients gain from their partnership experience? What are the most valuable outcomes for SchoolCo school improvement clients?

**Question 9:** Where do you see an opportunity to strengthen the impact of the school improvement team’s work with clients?

**Question 10:** Where do you see an opportunity for improved alignment and coherence between the work of the School improvement team and other programs/initiatives within SchoolCo?

### **Part D: Demographic Information** (Optional)

**Optional Demo Question 1:** How long have you been employed by SchoolCo?

**Answer Choices:** 0-3 years, 4-6 years, 7-10 years, 10+ years

**Non-school improvement Team Survey Instrument**

**Question 1:** How often do you engage in the following activities specifically pertaining to school improvement services?

**Answer Scale:** Daily-Weekly-Monthly-Every 3-6 Months -Annually-Never

**List of Activities:**

Meet with directors from the School improvement team
Meet with school improvement engagement managers, consultants, and/or project coordinators
Discuss school improvement services in scheduled meetings on your calendar
Reference or use materials produced by the school improvement team
Send written communication to any member of the school improvement team
Review or process written communication from any member of the school improvement team
Meet with another full team at SchoolCo other than the school improvement team
Engage in cross-team meetings with other full teams at SchoolCo

**Question 2:** How often do you feel school improvement team members should engage in the following activities each week?

**Answer Scale:** 1-Never 2-Rarely 3-Sometimes 4-Consistently

Internal team meetings focused on aligning core Si services and approach
Individual check ins with SchoolCo team members for collaboration and consultation
Project team meetings
Meeting with existing SI clients
Preparing materials for existing SI clients
Conducting presentations for/attending activities related to existing service contracts
Attending webinars, networking events/meetings, etc.
Research on evidence-based practices for clients
Working to engage prospective SI clients
Outreach to former clients on follow up and progress monitoring
Team learning and development in alignment with service offerings

Reflective conversations with managers related to progress towards goals, celebrations, growth, and professional opportunities
Cross-departmental meetings for service alignment, innovation, and/or data insights for continuous improvement
Problem of practice sharing or case consultancies

**Part B: Assessment of Collaboration Activities**

**Question 3:** Considering the SI team overall, how would you rate the following statements based on your individual experience and/or perception:

**Answer Scale:** 5-Strongly Agree, 4-Agree, 3-Disagree, 2-Strongly Disagree, 1-Do not have enough experience to rate

**List of Statements:**

The SI team works together to align consistent procedural experiences for clients.
Each SI team member operates with the same level of expertise on school improvement services offered by the firm
SI team members engage in regular training and professional development experiences to refine how their services are executed with external clients.
SI team members use common, shared protocols created by the organization when executing school improvement services with clients.
SI team members often observe each other in client-facing meetings to learn from and provide feedback to the SI team member facilitating a process for the client.
The SI team works together to fill gaps in service contracts if a consultant requires additional expertise or support.
SI team members usually work with clients on their own and do not often consult other team members on their projects.
SI team members work towards a common goal.
SI team members are often in competition with one another.
SI team members get a lot accomplished by working together.
SI team members have trusting relationships with each other.
SI team members have access to centralized organizational resources (e.g., expertise, research, data, case studies, etc.) that all SI team members know how to access.
SI team members keep each other up to date about broad problems of practice they are observing in client needs and consultation work.
SI team members often communicate internally about individual client needs.

SI team members have opportunities to share feedback with leaders on how to improve the services they offer.
SI team members have trouble communicating with others on the team.
SI team members prioritize equity in their work with partners.
Each SI team member can describe how an equity-lens is applied to each service offering.

### **Part C: Knowledge Management and Coordination**

**Question 4:** How would you rate your level of understanding of school improvement services based on your experience and perception?

**Answer Scale:** 0-No understanding 1-Extremely limited understanding 2-Limited understanding 3-Moderate understanding 4-Strong understanding 5-Extremely strong understanding

**Question 5:**

If you selected a rating of 4 or 5, explain what you believe contributes to your strong understanding of school improvement services.

If you selected a rating of 0, 1, or 2, explain what you believe contributes to your limited understanding of school improvement services.

If you selected a rating of 3, explain what you feel prevented you from selecting a 4 or 5.

**Question 6:** What is the purpose of the SchoolCo school improvement team?

**Question 7:** What are the most important elements of SchoolCo’s school improvement services?

**Question 8:** What should all school improvement clients gain from their partnership experience? What are the most valuable outcomes for SchoolCo school improvement clients?

**Question 9:** Where do you see an opportunity to strengthen the impact of the school improvement team’s work with clients?

**Question 10:** Where do you see an opportunity for improved alignment and coherence between the work of the School improvement team and other programs/initiatives within SchoolCo?

### **Part D: Demographic Information (Optional)**

**Optional Demo Question 1:** How long have you been employed by SchoolCo?

**Answer Choices:** 0-3 years, 4-6 years, 7-10 years, 10+ years



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