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Open Strategy for Social Impact: An Action Research Study of a Multistakeholder Open Strategy Planning Process

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Abstract

As social and environmental challenges become increasingly dire, organizations are focusing on creating positive social impacts beyond generating profits. Traditional strategic planning tools were originally created for the purposes of profit maximization and are not sufficient for organizations with the aim of addressing complex social issues. Open strategy offers a promising alternative by increasing multistakeholder involvement in the formulation of organizational strategy. Existing research has supported the idea that multistakeholder collaboration is an effective means for creating positive social impact since societal challenges are too complex for any one organization to sufficiently address. Despite these promises, there are risks and challenges inherent in the process of bringing together multiple stakeholders with divergent interests in an open strategy planning process. This action research focused on the process by which a nonprofit organization opens the idea generation phase of their strategic planning process to engage multiple stakeholders in order to increase their positive social impact. This study was informed by stakeholder theory, which offers the theoretical grounding to understand how organizations identify and engage stakeholders.

Keywords: open strategy, social impact, stakeholder theory, action research

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In the context of current environmental and social challenges, organizations are increasingly recognizing the need to move beyond a focus on generating profit and to take responsibility for their impact on society. In a 2019 survey of CEOs across a diverse set of industries in the for-profit sector, Volini et al. (2019) found that social impact was cited as the most important measure of success, more important than customer and employee satisfaction, financial performance, and regulatory adherence. In the nonprofit sector—composed of organizations with the sole purpose of advancing a social cause and providing a public benefit—the workforce grew by 18.6% between 2007 and 2017, compared to a growth rate of 6.2% in the for-profit sector (Salamon & Newhouse, 2020). As an increasing number of organizations are focused on creating social impact and moving beyond profitability, the applicability of traditional management approaches and tools for these organizations are coming into question while new alternatives are being conceived (Volini et al., 2019).

As organizations are undergoing rapid change, strategic planning continues to be the most popular management tool used globally (Rigby & Bilodeau, 2018), providing organizations with a structured process to make sense of the complex environment they exist within, formulate their long-range strategic direction, and define their approach to implementing their strategy (Wolf & Floyd, 2017; Whittington, 2011). There is evidence to suggest, however, that the way in which strategic planning is being practiced in organizations has not adequately evolved for today's reality. Strategic planning has

historically focused on how to maximize profitability by responding strategically to competitive forces, rather than focusing on how organizations can meet their economic goals while making a positive social impact. In his seminal article, Porter (2008, p.1) began with the statement, "in essence, the job of the strategist is to understand and cope with competition," and he continues on to use the word "profit" 118 times in the article while not once using the word "social." The focus on strategy as a means to maximize profitability does not reflect organizations' current emphasis on social impact (Volini et al., 2019). In addition, studies have found that a majority of organizational strategies developed through strategic planning underperform as a result of unimaginative and ineffective strategies, as well as poor stakeholder understanding of and commitment to the strategies (Beinhocker & Kaplan, 2002; Kaplan & Norton, 2005; Mintzberg, 1994; Stadler et al., 2021). Given these limitations, the conventions of strategic planning have been subject to scrutiny and reimagination.

Open strategy—the practice of including stakeholders beyond the leadership team in the strategizing process—is gaining popularity amongst organizations that are seeking an alternative to traditional planning approaches (Hautz et al., 2019). The practices associated with open strategy, from online idea "jams" to collaborative strategy workshops, stand in sharp contrast to the more exclusive and elite strategic planning processes that the majority of organizations continue to utilize (Hautz et al., 2019). Research suggests that open strategy can serve as an antidote to some of the pitfalls of closed strategy—it can increase the novelty of ideas generated, the commitment of stakeholders to the strategies, and the success of the implementation of the strategies (Seidl et al., 2019).

Despite some promising early indications, the body of research concerning the frequency, effectiveness, applications, and contingencies of these practices is still nascent and has significant room for expansion (Hautz et al., 2017). Based on the literature review, all of the existing research on open strategy to date has been focused on for-profit organizations whose primary aim is to increase profitability. Though much of this research may be applicable to other contexts, organizations with a focus on social impact—such as most nonprofit organizations—have unique dynamics that are worthy of investigation. Research on social impact has revealed that interorganizational collaboration between sectors, organizations, and civil society is a common approach to making meaningful social change (Selsky & Parker, 2005). Nonprofit organizations, in particular, operate in complex multistakeholder environments where they rely on a slew of stakeholders, such as funders, volunteers, employees, and the beneficiaries of their services, to support their continued existence. The effective management of these stakeholder relationships to increase legitimacy and trust is therefore crucial to the success of nonprofit organizations (Balser & McClusky, 2005). Given that open strategy has been found to increase stakeholder engagement and commitment, it made sense to apply the strategic planning process to the important yet understudied segment of nonprofit organizations as a focus of this study.

Research Question

As an increasing number of organizations have been moving beyond the singular goal of profitability and instead are concentrating on their social impact, more research is needed to determine how the practice of strategic planning—which originated with a focus on competing for profit maximization—is changing to reflect the evolving times.

At the intersection between the growing emphasis of organizations' social impact and the calls for exploring open strategy in new contexts, I sought to understand how organizations can effectively open their strategy processes in ways that positively influence their social impact. More specifically, the research question guiding this study was, how do organizations engage multiple stakeholders in an open strategy process to enhance social impact? In the following chapter, the literature that influenced this study and to which it contributes is reviewed.

Literature Review

An area of both practical and academic focus for considering the strategic planning process centers around the question of who should be involved in the formulation of organizational strategy. Though organizations take many unique approaches to strategic planning, they often have something in common: who is allowed to participate. Participation is reserved for a small group of leaders within the organization, excluding both employees lower in the hierarchy and external stakeholders, aside from the occasional strategic planning consultant (Stadler et al., 2021; Whittington, 2011). In alignment with this, research on strategizing has historically focused on executive teams (Mantere & Vaara, 2008). Observed both in practice and through the research, a new trend of a more inclusive and transparent strategy has become exposed—open strategy.

Open Strategy

Open strategy is the practice of engaging with historically excluded employees and/or external stakeholders in the creation of organizational strategies (see Table 1 for a list of additional definitions of open strategy). The strategizing process is often divided

into three distinct phases—idea generation, strategy formulation, and strategy implementation—with possibilities for varying levels of openness in each phase (Hautz et al., 2019). The goal of the idea generation phase is to identify significant trends that may affect the organization and create novel ideas for how they can achieve their mission in the future. In the strategy formulation phase the goal is to take these disparate ideas and turn them into a set of cohesive solutions that the organization can feasibly accomplish. This requires significant deliberation, prioritization, and decision-making to transform the list of ideas into an integrated plan. Finally, the goal of the strategy implementation phase is to actualize the initiatives within the formulated strategy (Stadler et al., 2021).

Table 1

Definitions of Open Strategy

Source	Definition
Whittington (2011, p. 532)	There are "two critical dimensions of strategy work: an openness in terms of inclusiveness, in other words the range of people involved in making strategy; and an openness in terms of transparency, both in the strategy formulation stage and, more commonly, in the communication of strategies once they are formulated."
Hautz et al. (2017, p. 2)	"Open Strategy is a dynamic bundle of practices that affords internal and external actors greater strategic transparency and/or inclusion, the balance and extent of which respond to evolving contingencies derived from both within and without organizational boundaries."
Birkinshaw (2017, p. 423)	Open strategy means "giving employees and outsiders more involvement in the process and more information about what is decided."
Malhotra et al. (2017, p. 397)	Open strategy is "a process by which an organization's strategy for the future is developed through a collaborative engagement of a variety of internal and external stakeholders such that suggestions for the organizations derive from a melding of the multiple perspectives represented amongst the diverse stakeholders."
Stadler et al. (2021, p. 3)	"Rather than limiting strategic deliberations to small executive teams, [open strategy practices] are involving a wider group of people—frontline employees, experts, suppliers, customers, entrepreneurs, and even competitors."

The early adopters of open strategy practices have suggested its many potential benefits, including greater creativity due to the diversity of perspectives, knowledge sharing, and increased levels of commitment to the strategy from the stakeholders involved (Hautz et al., 2017; Seidl et al., 2019). The knowledge that exists at the periphery of the leadership team is often characterized by a level of detail and applicability that can provide an information advantage to the organization should it be captured (Regnér, 2003). In addition, increasing the heterogeneity of those involved in strategizing mitigates the potential for biased and unimaginative strategies (Stadler et al., 2021). Along with the promise of more innovative and applicable ideas, opening the strategic planning process can increase the legitimacy, trust, and commitment from the stakeholders' involved (Morton et al., 2018). Those involved in the strategizing process are more likely to not only better understand the strategy but to also support the rationale behind it, leading to an improved implementation of the strategy—another claimed benefit of open strategy. It is all too common in organizations that utilize traditional strategic planning processes for their strategies to be unrealized. By opening up the strategic planning process, this increases the chance for a more effective, supported, and well-executed strategy (Seidl et al., 2019).

Despite the growing body of literature demonstrating the promise of open strategy to overcome some of the limitations of traditional or "closed" strategic planning approaches, documentation of adopting open strategy is still rare (Hautz et al., 2017; Stadler et al., 2021). Open strategy is, after all, not without its challenges. For instance, organizations that open up their strategy process can experience increased stakeholder pressure to enact certain strategies that they do not agree with (Hautz et al., 2017; Seidl et

al., 2019). In addition, the introduction of more stakeholders with heterogeneous perspectives and interests can be difficult to productively manage and can result in a loss of focus on the organization's central strategic issues (Seidl et al., 2019). There can also be challenges in the open strategy process to create a psychologically safe enough environment for participants to contribute truthfully. Studies have shown that both employees and external stakeholders can withhold insights out of fear of negative consequences such as spurring conflict (Denyer et al., 2011; Stieger et al., 2012). Though open strategy can build the legitimacy of a strategy, it can also be perceived as "open washing"—a manipulative tactic enacted by leaders to gain the benefits of open strategy without a true commitment to listening to stakeholders and changing the status quo based on their input (Dobusch & Dobusch, 2019). These dilemmas illustrate that simply opening up the strategy process to include more stakeholders does not automatically lead to successful financial and non-financial outcomes for organizations. Understanding how to be successful in implementing open strategy is important in order for more organizations to engage stakeholders in their strategizing process in a way that achieves the benefits that they are seeking while mitigating potential negative consequences.

Open Strategy in Practice

Organizations are increasingly adopting more transparent and inclusive strategy practices in order to improve the diversity of strategic ideas, increase commitment to those ideas, and ultimately, positively impact the implementation of strategic initiatives (Stadler et al., 2021). Though the research is still forming, there are early indications as to which organizations are opening up when and to whom. From the existing open strategy research, the majority of organizations that have been studied opened up the idea

generation phase of their strategic planning process but maintained a closed approach for subsequent phases (Hautz et al., 2019). Nokia, for example, engaged 5,000 of their employees in an online community dedicated to generating strategic ideas (Gratton & Casse, 2010). This organization and others such as these have solicited a wide range of perspectives and ideas, but then have chosen to limit stakeholder participation when it has come to the transformation of these ideas into concrete strategies and in the ultimate execution of those strategies. Some organizations have chosen to go beyond this and have engaged stakeholders in the strategy formulation and implementation phases. Red Hat, a software company that provides open-source software, rejected a closed strategic planning model due to its "open-source inspired" culture where transparency and high degrees of collaboration were fundamental to the organization's identity (Yeaney, 2011). The leadership team engaged employees in an online-based idea generation phase and then formed working groups of employees to vet and prioritize these ideas. Those employees that were the closest to the strategic themes were the ones tasked with developing the details of the initiatives and implementing them (Yeaney, 2011).

Which stakeholders are being included in open strategy processes is another important consideration for its successful practice. The majority of organizations who have engaged in open strategy over traditional strategic planning approaches have included employees from a wider range of hierarchical levels, but excluded external stakeholders such as external experts, organizational partners, and customers (Hautz et al., 2019). Though opening up to more internal stakeholders may still yield benefits that are not realized through closed strategy, Stadler et al. (2021) suggested that unless half of

the participants are external stakeholders, the novelty of ideas will be limited as the conversations will be largely dominated by internal employees.

Organizations that are facing fundamental shifts in their environment are more likely to find open strategy helpful due to the novel approaches that come from the organization's periphery (Stadler et al., 2021). Organizations from diverse industries, from software to food and beverage organizations, are adopting open strategy to enable them to stay ahead of the changes in their environment (Hautz et al., 2019). Based on the literature review, a vast majority of the open strategy research to date has focused on for-profit organizations with an ultimate objective of achieving financial success. Before prematurely concluding that open strategy is not being practiced by organizations focused on social impact, such as nonprofit organizations, it is important to look outside of the open strategy research to related domains.

Open Strategy and Social Impact

Though there is little research at the intersection of social impact and open strategy, there is considerable research suggesting that organizations involving multiple stakeholders is paramount to their successfully creating a positive social impact (Bäckstrand, 2006; Bryson et al., 2006; Dentoni et al., 2018; Lumpkin & Bacq, 2019; MacDonald et al., 2019; Selsky & Parker, 2005). Social issues are generally highly complex and too large for any single organization to meaningfully impact; therefore, collaborations across organizational and sectoral boundaries and with individuals of civil society are increasingly utilized to achieve social impact goals (Dentoni et al., 2018; MacDonald et al., 2019; Selsky & Parker, 2005; Tihanyi et al., 2014). By collaborating, organizations are able share resources, learn from each other, strengthen relationships,

and build stakeholder legitimacy and commitment (Gooyert et al., 2019). The focus on collaboration between organizations and individuals stands in direct contrast to the typical emphasis of organizations on competition, which is where traditional strategic planning approaches emerged from (Dyer & Singh, 1998; Porter, 2008). Organizations that are invested in creating a positive social impact are natural candidates for opening their strategic planning process, given the known benefits of multistakeholder collaboration for achieving social impact goals.

Stakeholder Theory

Stakeholder theory is one of the most commonly used theories in research on multistakeholder collaborations for social impact and is an appropriate theoretical framework to understand open strategy as a form of stakeholder engagement (Schaltegger et al., 2019; Seidl et al., 2019). Freeman (1984, p. 46) described stakeholders as "those groups and individuals who can affect or be affected" by actions conducted by an organization. Stakeholder theory emphasizes the interconnected web of relationships between an organization's stakeholders (e.g., suppliers, customers, investors, communities, employees) and posits that an organization should create value for all of its stakeholders, not just its shareholders (Freeman, 2010). The theory focuses on managing stakeholder relationships, not through manipulation and influence, but through a commitment to their wellbeing through understanding their needs and interests and creating value for them through the organization's strategies and subsequent actions (Hörisch et al., 2014). Another aspect of stakeholder theory is that it focuses on how organizations can identify mutual interests between stakeholder groups, rather than focusing solely on trade-offs between them (Freeman, 2010). In the context of social

problems, focusing on trade-offs between stakeholders is unlikely to lead to adequate solutions. Rather, focusing on areas of mutual interest between different stakeholders holds a greater promise in solving complex societal challenges (Hörisch et al., 2014). Organizations increasingly recognize that they are embedded in a network of important stakeholder relationships. The open strategy process is one way by which organizations can cultivate these relationships and their joint commitment toward common aims by identifying and reconciling different stakeholder interests.

Though organizations may attempt to create value for all stakeholders, it is generally necessary to prioritize different claims due to divergent interests, resource constraints, and other factors. Stakeholder salience refers to an organization's prioritization of different stakeholder claims and is determined by three attributes: power, legitimacy, and urgency (Mitchell et al., 1997). Power, in this instance, refers to the ability of stakeholders to influence the organization in order to enact the outcomes that they desire. Legitimacy is defined as the perception that the stakeholders' views are appropriate and legitimate within the socially constructed norms, values, and beliefs. Urgency alludes to the degree to which the stakeholders' claims demand immediate action (Mitchell et al., 1997). Stakeholder theory suggests that the more of these three attributes that a stakeholder possesses, the more likely their interests will be prioritized (Mitchell et al., 1997). Stakeholder theory offers the theoretical grounding to understand how organizations identify and manage stakeholders with differential power, legitimacy, and urgency throughout the open strategy planning process.

Stakeholder Engagement

Stakeholder engagement is a pivotal aspect of stakeholder theory, especially within the context of open strategy. According to O'Riordan and Fairbrass (2014), stakeholder engagement can be defined as the activities and practices that create opportunity for dialogue between an organization and its stakeholders with the objective of informing decisions. This concept underscores the reality that while organizations cannot directly manage stakeholders, they can effectively manage stakeholder relationships in a way that creates value for both the focal organization and its stakeholders that would not be possible to create on their own (Miles & Ringham, 2018).

There is a spectrum of stakeholder engagement activities, ranging from nonparticipatory exercises, typically seen in strategic public relations efforts, to more holistic and interactive practices involving stakeholders (O'Riordan & Fairbrass, 2014). The extent of stakeholder engagement is directly proportional to the degree of influence that they possess. Higher levels of engagement typically signify a greater influence of stakeholders in the strategic process. This higher degree of engagement is characterized by mutual dependency, risk sharing, empowerment, and trust. Such engagement leads to stronger relationship building anchored by trust and commitment. However, high levels of engagement are resource intensive and rely heavily on the foundation of trust and interdependencies between stakeholders (Miles & Ringham, 2018).

Open strategy is a form of stakeholder engagement, and though the level of participation from stakeholders is inherently higher than in a closed strategy approach, the influence that stakeholders have on the strategic direction of the focal organization can vary. In some instances, stakeholders are simply consulted, without assurances that

their input will be considered by the organization. In other scenarios, stakeholders are engaged in a multiway dialogue and granted some decision-making power in shaping the overall strategy (Miles & Ringham, 2018). This variability highlights the dynamic nature of stakeholder engagement in the context of open strategy.

Gaps in the Open Strategy Literature

Researchers from both the domains of open strategy and multistakeholder collaboration have called for further research to be conducted relevant to the effects of open strategizing on outcomes. From the literature on open strategy, one avenue of potential research involves further understanding the various practices of open strategy and how and when different open strategy practices should be applied. In particular, scholars have expressed a need for more research exploring effective open strategy practices in contexts where external participants (e.g., organizational partners, customers) are involved (Birkinshaw, 2017; Hautz et al., 2019; Pittz & Adler, 2016). Another avenue of potential research involves how organizations might manage some of the dilemmas of open strategy, including managing divergent stakeholder interests, power asymmetries between participants, and the processual complexity of involving wider audiences (Hautz et al., 2017). In addition, researchers have called for a greater understanding of the effects of open strategizing on organizational outcomes. Seidl et al. (2019) suggested that more research is needed on how open strategy can more effectively deliver the benefits of knowledge sharing, a commitment to the strategy, and the generation of ideas that truly challenge strategic conservatism. Hautz et al. (2017) called for the examination of the effect of open strategy practices on the content of the strategic plan itself and on other outcomes within different cultural, industry, and organizational contexts.

Though researchers who have focused on multistakeholder collaborations have not always explicitly used the term “open strategy,” they have called for more research on collaborative strategizing from this domain. Selsky and Parker (2005) called for additional research on the practice of cross-sector partnerships and, in particular, how they collaborate across sectoral differences and learn from each other. Gooyert et al. (2019) called for the investigation of how differences in the outcomes of interorganizational strategizing processes can be understood. Pittz and Adler (2016) also called for additional research on the implications of open strategy on important organizational outcomes with multistakeholder partnerships. As more organizations are working across organizational boundaries for the purpose of social impact, the calls for more research to understand how organizations can effectively open their strategy process to include multistakeholder partners are timely.

Methods

As discussed in the introduction, this research sought to simultaneously provide actionable insights to guide organizations to effectively open their strategy process in a way that positively influences their social impact, while also contributing to the development of open strategy theory. Action research was chosen as the methodology for this study based on its explicit emphasis on bridging the divide between practice and theory. This section begins with an explanation of action research methodology and the rationale for choosing this methodology for the study. I then describe my positionality, the meaning of validity, and the ethical considerations of action research. Finally, I provide an account of the research context and the design of the action research process.

Action Research Methodology

In order to generate insights into how open strategy can be adopted in a nonprofit context to enhance the social impact of organizations, an action research methodology was chosen due to the novel data and unique contribution that this method promises. Action research in the organizational context is a form of qualitative research in which researchers work with members of an organization on issues of practical importance to them to ultimately contribute to both the development of theory and real-life change. The origins of action research in management literature stems from Lewin (1946) and has since received increasing levels of legitimacy in the social sciences (Willis & Edwards, 2014). Unlike other forms of research that attempt to minimize the intervention of researchers as much as possible, for action research intervention is paramount. Interventions for action research are often conducted in four stage cycles—planning, acting, observing, and reflecting—and may be repeated multiple times depending on the results of the last intervention (Kemmis, 1982). The application of these cycles of action research will be further elaborated in the Research Design section.

Choice of Action Research Methodology

There are several distinct features of action research that justify the use of this research method over potential alternatives. Compared to other forms of research, action research strongly emphasizes usable and pragmatic insights. Fundamental to the research tradition is the question of how researchers can generate practical solutions in service to creating positive change (Reason & Bradbury, 2001). Though action research can address theoretical questions, the consensus from scholars is that practical and applied questions should be prioritized in the research process (Willis & Edwards, 2014). The utility of

knowledge is one of the greatest contributions of action research (Herr & Anderson, 2014). Though the premise of open strategy may be simple, the successful execution of an open strategy process that engages multiple stakeholders is complex. This has contributed to a limited adoption of open strategy processes being observed in practice. Action research methods provide insights into how the adoption of open strategy can be accomplished in a real-world setting and demonstrate the expected and unexpected outcomes of actions taken throughout the process. Action research methodology was chosen for this study out of the desire to contribute insights that could help demystify how practitioners could effectively apply open strategy practices.

Though action research is pragmatic in nature, this does not suggest that it is unconcerned with theory. In fact, action research is considered an effective methodology for "developing and elaborating theory from practice" (Eden & Huxham, 1996, p. 80). Though action research is not considered a rigorous method for testing existing theory in the traditional sense, it is exceptional at theory generation given the unexpected results that often emerge in the unpredictable and uncontrolled context of organizational change. The real-time and iterative nature of this research method allows for applying various theoretical frameworks and discovering which theories are more applicable and which are ultimately used in the face of organizational change (Eden & Huxham, 1996). Action research increases the likelihood of identifying the "theories in use" in organizational settings as opposed to their "espoused theories" (Argyris & Schon, 1974, p. 7). Given that open strategy research is still in an early stage of maturity, an exploratory approach from which the elaboration of existing theory and the creation of new theory can stem from the practice setting is likely to contribute to the theoretical development of this research

stream. This was especially important for a study of open strategy in the context of social impact given the lack of existing research in this area.

Along with the practical and theoretical contributions of action research, a key benefit to this research methodology is the greater access to information that can be difficult to achieve with other methods of research due to the close collaboration between the researcher and insiders of the organization (Herr & Anderson, 2014). Eden and Huxham (1996) contended that action researchers should focus on drawing out information that would be difficult to obtain utilizing other research methods. When considering potential research methods for this study, I was unable to identify existing research on open strategy that provided an in-depth account of the process of designing and facilitating an open strategy process with multiple stakeholders and the corresponding outcomes of these processes. This is likely due to the limited number of organizations that have adopted truly open strategy planning processes, as well as the difficulty in obtaining rich accounts of the process of the organizations who have adopted them. On one hand, practitioners who are responsible for facilitating open strategy processes are unlikely to take a methodical approach to capturing data along the way. On the other hand, researchers often do not have the consulting experience required to successfully facilitate change within the organization. This creates a barrier to entry into action research for researchers without consulting experience. Given my professional background as a consultant specializing in working with organizations to create more participatory organizational processes, including utilizing open strategy, this study resulted in contributing insights that would have otherwise been challenging to obtain. To my knowledge, there were no existing research studies that charted the process of

adopting open strategy within organizations, thus this study sought to fill this gap in the literature given my unique position as an established consultant in the field.

Along these lines, the choice to conduct action research was also an ethical one. In my professional experience, designing and facilitating an extensive open strategy process that involves multiple stakeholders is resource intensive. By conducting action research, researchers are able to engage in a reciprocal relationship with the organization of interest by providing consulting services that benefit the organization, and in return, contribute to research through the methodical study of the process and outcomes of the actions taken. This reciprocal relationship can be seen as taking a normative stance or as applying an instrumental function since the reciprocation can lead to greater access to information that could otherwise be viewed as inconvenient and one-sided. Further discussion of the ethics of action research will be provided in the Ethical Considerations section.

Positionality of the Researcher

My positionality as researcher in relationship to the participants and their setting correlated to a defining characteristic of action research. Even the term "researcher" has a different meaning in terms of action research, as those deemed as "subjects" in other forms of research can, in fact, be viewed as researchers insofar as they are part of the process of generating knowledge as it relates to the interventions (Stringer, 2007). Action researchers can be either insiders to the research setting (i.e., researching an organization in which the researcher is employed) or outsiders to the research setting. Given that I was not an employee of the participating organization, this research was considered outsider action research.

The level of collaboration between the participants and researchers can also vary in strength (Herr & Anderson, 2014). Participatory action research (PAR) is a form of action research that exists on the more collaborative end of the research spectrum and is characterized by the involvement of participants in the research study as both subjects and coresearchers (Baum et al., 2006). By working in collaboration with participants, PAR enables greater knowledge generation, ensures that the action interventions are relevant to the research context, and enables the construction of new meaning through collaborative reflections on the actions taken (Kindon et al., 2007). This two-way relationship ideally benefits both the researcher and practitioner—the researcher contributes to improving the practitioner's context, and the practitioner contributes to the creation of knowledge (Eden & Huxham, 1996). This study was a PAR study since I collaborated with a core team of participants to design, facilitate, and reflect on the open strategy process. In other words, as researcher I was not applying open strategy on the participating organization, but rather working with the organization to adopt open strategy. Based on the outsider perspective and the participatory nature of this research, this research fit within the "outsider in collaboration with insider" category of Herr and Anderson's (2014, p. 49) continuum of positionality.

An important characteristic of "outsider in collaboration with insider" action research is the dual role of the researcher as both researcher and consultant (Herr & Anderson, 2014, p. 49). This type of research requires the researcher to not only be effective at conducting action research but also have experience as a consultant and confidence in their ability to guide the participating organization to effectively navigate organizational change. The dual aims of fulfilling the needs of the client while also

creating transferrable knowledge makes action research a complex and time-intensive method of research (Eden & Huxham, 1996). Consultancy projects without the aim of generating transferrable knowledge generally do not result in a high degree of data being captured or the reflection and analysis that action research requires. The action research design of this study, explained in the Research Design section, intentionally delineated between the tasks that were conducted for the purposes of action—tasks that would be required in a purely consulting engagement—and the tasks required for the explicit purpose of research. This distinction was intended to provide clarity to me as researcher, the participating organization, and readers of this study as to which role I was playing throughout the process.

Though positionality in action research is complex compared to other forms of research, I was in a unique position as a consultant with prior experience to facilitate the open strategy process and to navigate these challenges. Bringing explicit awareness to the positionality of the researcher is a key to generating valid research; however, there are other criteria specific to action research that should also be followed toward this aim.

Rigor in Action Research

Just as the positionality of the researcher is unique in action research compared to other traditional forms of scientific research, so too are the criteria for what constitutes validity in action research. It is important to distinguish validity in action research for several reasons. Firstly, neither quantitative nor qualitative research methods consider the action-oriented outcomes inherent to action research. Secondarily, quantitative researchers aspire to identify insights about reality that can be generalizable to a broad context. On the contrary, action research is conducted with the assumption that different

organizational contexts require different solutions; therefore, it focuses on the development of appropriate solutions for the particular dynamics of the local setting (Stringer, 2007). The generalizations made in action research describe thematic patterns within the specific context which may be transferred to similar contexts through further experimentation within those contexts (Argyris & Schon, 1989). Qualitative researchers generally seek to understand reality within the natural setting of the subjects and try to maintain the position of being an outsider while minimizing their own intervention. In action research, intervention itself and the impacts of those interventions is the very source of knowledge generation (Herr & Anderson, 2014).

Despite these differences, action research must still follow rigorous guidelines for what constitutes quality research. Rather than judge action research with a positivist or naturalistic lens, however, it is important to understand and use validity criteria specific to the method. Though there is not a singular source for what constitutes quality action research, Eden and Huxham (1996) summarized common criteria across different disciplines within the field. Criteria can be categorized into two main categories: outcome validity and process validity.

Action research achieves outcome validity when the findings can be transferred to similar contexts, generate new theory, expand existing theory, or result in products and instruments (e.g., scales, frameworks) that can be used in other settings (Herr & Anderson, 2014). Though action research does not intend to find widely applicable insights, the findings should have some implications beyond the specific project at hand. Action researchers should be explicit about the possibilities for applying the findings of the research to other situations. Action research should also aim to be pragmatic and

useful for practitioners. Though other forms of research often provide a summary of practical implications in the research output, action research places a stronger emphasis on what the consumers of the research should do with the knowledge generated from the study. Along with a pragmatic focus, action research should also contribute to theory, and more specifically, generate emergent theory which either develops or elaborates theory from the perspective of practice. Though action research is not an effective methodology for testing theory due to the highly uncontrolled environment in which it takes place, it is an effective method for exploring how existing theories are useful and how they are used when faced with a real-life change and also for identifying new theoretical contributions from the field (Eden & Huxham, 1996). Given these criteria for outcome validity in action research, I was explicit about the ways in which the findings can be useful for practitioners in other contexts outside of the research settings. I was also informed by existing theory at the onset of the project and, based on the emergent findings of the study, I elaborated on existing theory.

Outcome validity is dependent on a well-designed action research process. Process validity refers to the extent to which the research is designed and implemented in a way that contributes to effective change within the organizational context and the development of quality findings (Herr & Anderson, 2014). Quality action research requires an exceptionally high degree of reflection on the emerging research implications at every episode of interaction with the participating organization. This requires not only an orderliness as it pertains to capturing ongoing data but also a systematic “method of exploration” outside of the practice-oriented setting where the emergent findings of the research are reflected upon. In other words, it is not enough to simply report what actions

were taken. Attention must be given to the process of learning from each episode and documenting the rationale for subsequent interventions based on those reflections (Eden & Huxham, 1996). The triangulation of data is important to action research and can be achieved in multiple ways. Triangulation can refer to the inclusion of multiple voices in the process, leading to findings that better represent a broader spectrum of interpretation of a situation rather than solely the researcher's perspective. Triangulation can also refer to the use of a variety of methods for data collection (Herr & Anderson, 2014). Triangulation in action research also refers to the triangulation between the observation of the social processes being studied (e.g., a meeting, email exchange), the interpretation of these social processes (e.g., accounts by the participants), and the changes in these interpretations over time. By triangulating these three observations, which are often conflicting perspectives, action researchers can identify nuanced insights that elaborate on existing theories or generate new theory (Eden & Huxham, 1996). Given these criteria for process validity, I planned to systematically capture process steps and observations and to have a repeatable approach for reflecting upon the process steps at each intervention point. I ensured that multiple participants of the research process were included in the exploration of the research findings in order to enable a triangulation of perspectives. I also designed the study in such a way that multiple types of data were collected throughout each cycle of the process. A further description of the data collection process can be found in the Data Collection section.

Ethical Considerations

Along with unique criteria for conducting quality action research, there are also ethical considerations inherent to this form of research. Similar to other forms of research

including human subjects, it is important that researchers engage participants in a process of informed consent to ensure that they understand the aims and likely consequences of the research (Stringer, 2007). Given the emergent and unpredictable nature of action research, however, it can be difficult to know in advance to what participants are consenting to. Therefore, in the case of doctoral students who are conducting action research such as myself, it is important they ensure that the goal of completing the dissertation does not supersede the goal of benefiting the participating organization. This requires an authentic collaboration in which the researcher is not making a change "on" the participating organization, but rather working "with" the organization to define the project objectives and to design it in such a way that the project is relevant and impactful for them (Herr & Anderson, 2014). Should the project evolve in such a way that the participating organization is no longer benefiting, it is important that the organization should not experience a sense of pressure to continue participating in the project. Given the participatory nature of action research, it is generally not possible to guarantee confidentiality in all facets of the project. This highlights the importance of clearly communicating how information will be utilized at each phase of the project to ensure that participants know what to expect.

Given these considerations, I engaged in initial discussions with the executive director of the organization Trees for All, the participating organization for the study, to ensure that the research design was in alignment with the needs of the organization. Involving individuals internal to the organization to participate on the strategic planning team (SPT) also decreases the likelihood of causing harm to the organization out of a lack of sensitivity to the unique social and political dynamics of the organizational context.

Though it is not practical for stakeholder participants to remain anonymous to one another at all times—for example, when they are participating together in a workshop—their names, along with their affiliated organization, were anonymized in the findings of the study. A written informed consent document was provided to all participants involved in this study to ensure that they understood the terms of this study and how their input would be utilized.

Research Context

This study was conducted with an organization I refer to as "Trees for All", a pseudonym used to protect their identity. Trees for All, an environmental nonprofit organization in St. Louis, Missouri, was founded in 1993 to be part of the solution to the crisis of urban tree loss and the subsequent threat to ecological and human health. Their mission is to restore and sustain urban forests to benefit human communities and the ecological environment. Trees for All operates a seven-acre nursery where they grow trees and have two core models for distributing these trees–GrowandGive and TreesinNeed. The GrowandGive program has been the "bread and butter" for Trees for All. Through this program, groups and organizations (e.g., churches, nonprofits, businesses, and municipalities) order free trees through an online form, and when the trees are ready, they are picked up at the nursery by the customer. The success of the GrowandGive program, as it relates to social impact, is contingent on the abilities and resources of the end customer to successfully plant and care for the trees that they order. This means that local communities with lower socioeconomic status are less likely to benefit from this program. As an alternative, the TreesinNeed program has become an increasing focus of Trees for All, especially catalyzed by the last several years of

escalated societal focus on eliminating social inequality. In this program, Trees for All proactively identifies areas in the greatest need of trees based on both areas of low canopy coverage—correlated with lower socioeconomic conditions—and areas recently impacted by natural disasters resulting in the destruction of existing trees. TreesinNeed requires more time and resource investment per tree planted than the GrowandGive program, as it requires Trees for All to develop relationships in communities of need, respond to the requests of that community, educate them on tree maintenance and care, and often take on some of the maintenance responsibilities themselves after the trees are planted, such as watering and mulching. Despite the increased resources and capabilities required for the TreesinNeed program, Trees for All hoped to be able to expand the impact that they make through this program in local areas with the greatest need. They also hoped to adapt the GrowandGive program in such a way that it would be more accessible to individuals and groups from lower socio-economic backgrounds.

Ultimately, at the start of this study, Trees for All was at a crucial point in their journey where they were revaluating how to align their priorities and programs in a way that would have the greatest impact on its overall mission, rather than focusing on simply distributing trees to whomever orders them. To make a larger social impact in the region, they recognized that they must work in tight alignment and collaboration with their many stakeholder groups in order to operate in an effective way. As of 2020, Trees for All received 63% of its funding from government and private grants and the remaining 37% from donations, tree sales, and other sources. They employed one executive director and four staff members and otherwise depended on a network of stakeholder groups to make their work possible (see Appendix A for a stakeholder map). Within each of the external

stakeholder groups (e.g., funders, beneficiaries) there was a mixture of individuals and organizations across nonprofit, for-profit, and governmental sectors, resulting in a high plurality of unique forms of external stakeholder relationships. Adding to this complexity, some individuals and organizations spanned multiple stakeholder groups; for example, the Missouri Department of Conservation provided grants (funder), supplied tree seedlings (supplier), and partnered with Trees for All on programming (organizational partner).

Strategic Planning Process at Trees for All

Despite the high degree of stakeholder collaboration that Trees for All relies on, they have historically conducted strategic planning using a traditional or closed approach. The executive director of Trees for All indicated that the organization's prior strategic planning process has had limited success in generating knowledge sharing and novel thinking and in creating legitimacy and commitment from stakeholders. This is in line with what the literature review revealed on the common challenges with traditional strategic planning approaches. The organization was interested in adopting open strategy during the idea generation phase with the hopes of making a greater social impact by formulating a strategic plan that reflected the perspectives of their stakeholder groups and that garnered alignment and commitment to the strategy from both internal and external stakeholders. The executive director believed that this was the right time to engage in an open strategic planning process as she believed the organization would require greater stakeholder collaboration and commitment than before to create the positive social impact that Trees for All sought to make.

Research Design

In order to create knowledge that could be both applied in the context of Trees for All and utilized beyond this setting with other practitioners, I documented not only the process but also the product of the collaboration—an important method of creating transferability of the findings (Herr & Anderson, 2014). This dual focus of action research required an intentional research design that simultaneously would lead to facilitating change in the organization, while also reflecting on the changes made for the purposes of knowledge generation. The following section provides a detailed overview of the action research design of this study and is summarized in Table 4.

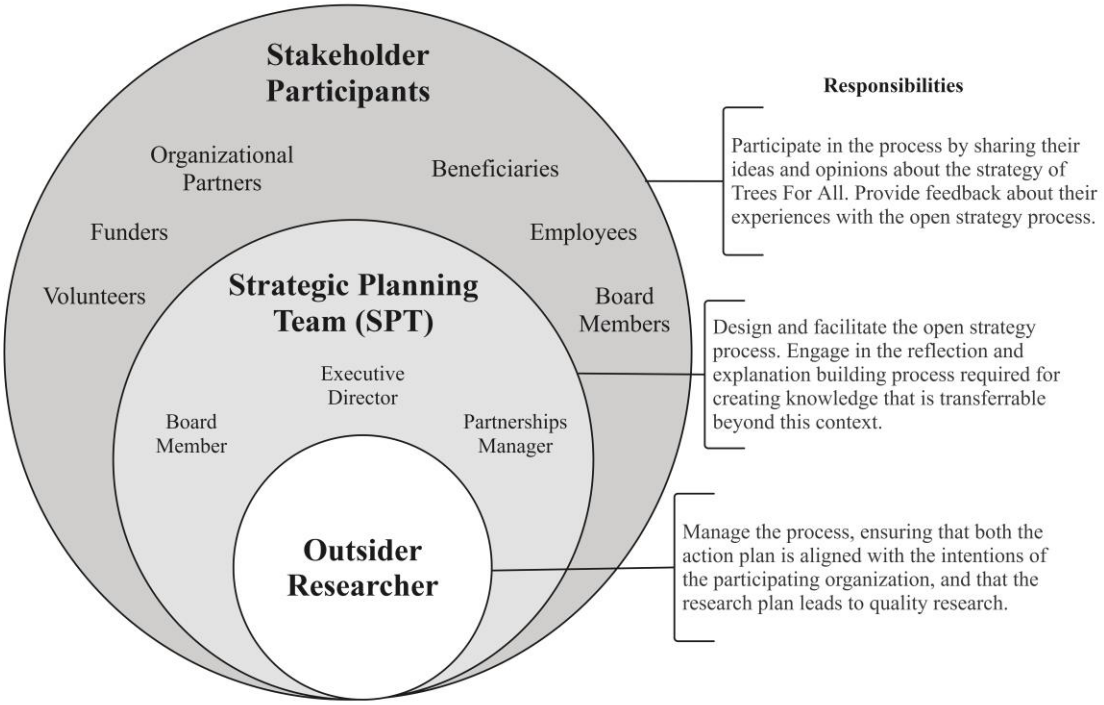
Action Research Roles

Though many stakeholders participated in the idea generation phase of the open strategy process, participation in the core strategic planning team (STP) was limited to a few key stakeholders. Figure 1 provides an overview of the varying degrees of participation in the research process. The "outsider researcher" refers to me as the main researcher of the study. As outsider researcher I was responsible for directing the process and ensuring that the action plan was aligned with the intentions of the participating organization, Trees for All, and that the research plan would lead to quality research. The SPT involved both me as well as a few primary stakeholders within the research context. This included the executive director, the partnership manager, and a board member of Trees for All. The responsibilities of this team were to work together to design and facilitate the open strategy process and be a part of the reflection and explanation building process required for creating knowledge that would be transferrable beyond this context. The stakeholder participants included individuals representing Trees for All's

various stakeholder groups (e.g., beneficiaries, funders, organizational partners). These participants were responsible for participating in the process by sharing their ideas and opinions about the strategy of Trees for All. They also provided feedback about their experiences with the process so that the outcomes of the open strategy process could be assessed from the stakeholder perspective. The data collection process will be further elaborated in the Data Collection section.

Figure 1

Action Research Roles



Action Research Cycles

Action research is conducted in iterative cycles of action and through subsequent reflection on the action itself and its outcomes. Kemmis (1982) introduced a commonly used four-stage cycle for this process—planning, acting, observing, and reflecting—that can be conducted once or repeated multiple times as required depending on the results of the last intervention (see Table 2 for more details).

Table 2

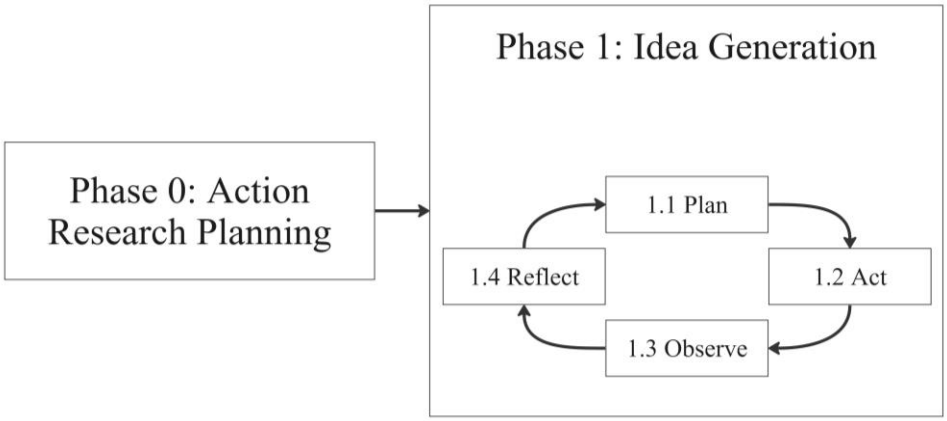
Action Research Cycle

Stage	Definition
Plan	Develop a plan of action for implementing a change.
Act	Take action to implement the plan.
Observe	Observe and analyze information on the effects of the action taken.
Reflect	Reflect on outcomes and implications for subsequent actions.

In this study, the Kemmis cycle was used once throughout the idea generation phase of the strategic planning process. Prior to this phase, the SPT conducted a planning phase (Phase 0) that ensured that the research process was designed in such a way that it would achieve quality criteria in both the process and outcome, as discussed in the Action Research section. Phase 0 included the identification of Trees for All's objectives for the project, the creation of an action research plan, and the establishment of an insider research team who worked with me on the design and facilitation of the open strategy process. The two phases in this study and the four-stage cycle within the idea generation phase are summarized in Figure 2.

Figure 2

Action Research Phase Summary



Data Collection

There were two main categories of data collected in this study. The first category was based on the observation of the process of adopting open strategy, while the second category pertained to the outcomes of the process.

Process Data. The data related to the process included the observation and documentation of the many episodes of working with the SPT to design and facilitate the open strategy process. Process data consists of stories about "what happened and who did what when" (Langley, 1999, p. 692). In other words, it involves sequences of activities and decisions that are made over time. Process data includes the steps and key decisions made during each stage of the process, and the SPT's observations related to why these decisions were made. Data collected included the research diaries and recorded dialogs of 35 hours of meetings, primarily with the SPT, and the documentation of the artifacts (i.e., stakeholder identification criteria) that were used along the way. Process data was collected at each phase of the project.

Outcomes Data. The data related to the outcomes of this research included the intended and unintended outcomes of the open strategy process based on the stakeholder participants and the SPT's perspectives of the process. This data included the strategic ideas generated by stakeholder participants during the idea generation phase, as well as the stakeholder participants' written feedback and interviews following Phase 1 idea generation (see Appendix B and C for the Workshop Feedback Form and the Interview Guide). Additional outcome data included the recorded dialogs within the SPT, reflecting on the outcomes of the process after Phase 1. Table 3 provides a summary of data sources within each phase and stage of the process.

Table 3

Data Sources

Stage	Process data sources	Outcome data sources
	Phase 0: Action research planning	
	Observations and artifacts from • 2 hours of meetings with the Executive Director, • 3 hours of meetings with the SPT.	
	Phase 1: Idea generation (IG)	
1.1 Plan	Observations and artifacts from • 14 hours of meetings with SPT	
1.2 Act	Observations and artifacts from • an idea generation survey, • 5-hour idea generation workshop.	
1.3 Observe	Observations and artifacts from • 3 hours of meetings with SPT.	• Workshop feedback responses from 17 participants • Interviews with 8 participants • Idea generation survey and workshop idea outputs
1.4 Reflect	Observations and artifacts from • 1 hour of meetings with SPT.	• Strategic Planning Team (SPT) reflection of the outcomes

Data Analysis

Once data was collected at each phase, the SPT analyzed the data within the fourth stage (reflect) of the action research cycle. As Eden and Huxham (1996) suggested, the rigorous triangulation of the rich data sources and diverse perspectives in an action research project allow for greater credibility of findings. As it relates to the process of this research, I took a narrative strategy to analyzing the data. Narrative strategies to data analysis involve transforming the raw data of the process into a story of the key events using time as the key anchor point (Langley, 1999). I provided a sequential account of the design and facilitation of the open strategy process, including

descriptions about how and why the process unfolded in the way that it did. As the outsider researcher, I participated, along with the rest of the SPT, in the process of analyzing this data and constructing a narrative of the open strategy process.

As it relates to the outcomes of the research, data on the SPT meetings and stakeholder perspectives of the process were collected and analyzed as important outcomes of the open strategy process. Stakeholder participant interviews and written feedback data were coded and analyzed using an inductive approach. The themes generated from these data sources resulted in a data structure that provided insights into how the open strategy process impacts outcomes that are found to influence the ability of the focal organization to enhance their social impact (see Figure 11 in the Findings section). In addition, ideas generated from stakeholder participants were analyzed by the SPT to assess the quality of the ideas and to generate themes. The following section provides a detailed account of how the roles, action research cycles, data collection, and data analysis methods were integrated into a cohesive action plan.

Action Research Plan

Table 4 provides a summary of the steps and outcomes of the action research project. The "Action outcome" items are deliverables that would be expected in a traditional consulting project without the concern for advancing theory, while the "Research outcome" items are the deliverables specific to generating transferrable knowledge. The remainder of this section elaborates upon each phase and subsequent stage of the action research plan.

Table 4

Action Research Plan

Stage	Step	Action outcome	Research outcome	
			Process data	Outcome data
		Phase 0: Action research planning		
	• Establish roles • Guidelines for decision-making • Identify desired outcomes	• Roles established • Guidelines for decision-making determined • Desired project outcomes documented	• Data collection: Meeting, observations, and artifacts • Data analysis: Narrative analysis on the Phase 0 process	
		Phase 1: Idea generation		
Stage 1.1: Plan	• Frame strategic issues • Identify stakeholders • Design idea generation process • Create a data collection and analysis plan	• Strategic issues identified and framed • Stakeholders participants identified • Idea generation process documented	• Data collection: Meeting, observations, and artifacts	
Stage 1.2: Act	• Facilitate the idea generation process (survey and workshop)	• Stakeholder participant strategic ideas generated	• Data collection: Meeting, observations, and artifacts	• Data collection: Ideas generated from survey and workshop
Stage 1.3: Observe	• Synthesize stakeholder ideas into key themes • Analyze outcomes from the idea generation process	• Synthesized stakeholder idea generation input into themes	• Data collection: Meeting, observations, and artifacts	• Data collection and analysis: Stakeholder participant workshop feedback and interviews
Stage 1.4: Reflect	• Reflect on the outcomes of the idea generation process	• Reflections documented	• Data collection: Meeting, observations, and artifacts • Data analysis: Narrative analysis on Phase 1 process	• Data collection and analysis: SPT reflections

Phase 0: Action Research Planning. The first phase of the action research project involved the planning activities that were required to set the project up for success. Given that this project was a participatory action research (PAR) project, this included establishing a Strategic Planning Team (SPT) of select individuals from within

the organizational context. Once the SPT was established, we aligned on and documented the desired outcomes of this project. Though the general goals of the project were previously discussed with the executive director of Trees for All in order to align their participation in this project, discussing and documenting these desired outcomes with the full SPT was important to ensure relevance and clarity. After establishing project objectives, I worked with the SPT to establish the roles and guidelines for decision-making, answering who should be involved in the final approval of the strategy and how those decisions should be made. Finally, I developed a project plan and an associated high-level timeline for the subsequent phases of the project. I then created an action research plan, in coordination with the project plan, that emphasized the tasks and timeline required to achieve the research-specific aims of the project.

Phase 1: Idea Generation. The idea generation phase is focused on the creation of innovative ideas and solutions regarding strategic challenges and opportunities facing an organization (Hautz et al., 2019). The value of opening the strategic planning process in this phase is that it offers the potential for generating more creative solutions through involving a more heterogenous group of individuals than can be found through the organization's leadership team alone. In addition, outsiders of an organization are generally less encumbered by past assumptions and internal power dynamics that can minimize authentic participation (Stadler et al., 2021). Within this phase, the SPT engaged one iteration of the four stages of the action research cycle.

Stage 1.1: Plan. In this stage, I worked with the SPT to design and plan for the facilitation of the idea generation phase. This involved identifying and prioritizing the stakeholders to participate in the idea generation phase, framing the strategic issues for

idea generation, and designing the open strategy process. Key decisions were made during this stage about which stakeholders to include and exclude. In addition, the SPT had to determine what specific issues to focus the idea generation phase on and how to frame those issues in a way that would solicit meaningful responses from participants. Lastly, open strategy design can include digital processes (e.g., surveys, online idea contests) and/or analog processes (e.g., workshops, interviews), each with their own benefits and limitations (Hautz et al., 2019). Along with the SPT, I made determinations about how to engage digital and analog processes in a way that we thought would be best based on their intended objectives. Based on the specific design of the idea generation process, I created the data collection and analysis plan for this phase. Data collected in this phase included process data related to how the SPT identified and prioritized the stakeholder participants, how specific strategic issues were determined, and the rationale and process by which design decisions were made.

Stage 1.2: Act. Once the planning for Phase 1 was completed, the SPT and I facilitated the idea generation process. This included both creating a survey for soliciting strategic ideas from stakeholder participants and facilitating an idea generation workshop. The action outcomes of the project included the many ideas generated by stakeholder participants, along with the SPT's assessment of the ideas. These stakeholder ideas were analyzed as outcome data for the project. Additional data collected included the process observations as to how the idea generation process unfolded.

Stage 1.3: Observe. Following the idea generation workshop, I formed a written feedback form and conducted interviews with stakeholders from different stakeholder groups to capture data about their experience with the open strategy process. I conducted

inductive qualitative analysis based on the written feedback and interviews with participating stakeholders. This data supplemented the observational data captured by the SPT to explain how the process of open strategy impacted stakeholder outcomes, resulting in a data structure (see Figure 11 in the Findings section). in the Action outcomes of this stage involved synthesizing the stakeholder input into key themes and analyzing these themes and their implications to Trees for All's strategy.

Stage 1.4: Reflect. In the final stage of the idea generation phase, I reflected on the process with the SPT, documenting their insights and lessons learned about the process. I then conducted a narrative analysis on the process data collected throughout this phase.

Findings

This section outlines the findings of the study based on the process and outcome data collected and analyzed throughout each of the two phases: action research planning and idea generation. The findings in Phase 0 provided an account of the planning phase of the action research, including the methods used to establish roles, determining guidelines for decision making, and identifying project objectives. The findings from Phase 1 offered an account of the planning, execution, and outcomes of the idea generation phase. These findings were provided across the four stages of the action research cycle.

Phase 0: Action Research Planning

The first phase of the action research project involved establishing the SPT roles, clarifying the objectives of the project, creating decision-making guidelines for organizational stakeholders, and creating a timeline for the phases of the project. The data

collected during this phase involved meeting recordings, memos, artifacts from 2 hours of meetings with the executive director of Trees for All, and artifacts from 3 hours of meetings with the SPT. All meetings in Phase 0 were conducted over Zoom, a video conferencing technology. A collaborative online whiteboard platform, Miro, was utilized throughout Phase 0 to facilitate brainstorming and efficiently capture meeting notes and artifacts.

Project Roles

The initial task for me and the executive director was to determine who would be on the SPT—the team responsible for designing and steering the open strategy process on behalf of the organization. The executive director and I decided to limit the total team participants to four people in order to minimize coordination difficulties associated with larger project teams. The decision was made to involve a staff member and a board member who were judged by the executive director as having a propensity for process thinking and a high degree of credibility across their respective stakeholder groups. Langley (2007, p. 271) defined process thinking as the "consideration of how and why things—people, organizations, strategies, environments—change, act and evolve over time." The ability to consider microlevel activities and practices within a strategic planning process relies on process thinking, which some individuals are more or less oriented toward (Langley, 2007). From the change management literature, leadership credibility is found to have a positive effect on stakeholders' commitment to change (Ouedraogo et al., 2023). Given that opening the strategy process was a change for the organization, including a board and staff member on the planning team enabled greater trust in the process. As the executive director stated in a final reflection meeting: "Having

a board representative, having a staff representative, having this committed steering committee, I think is essential to the success of this."

Decision-Making Guidelines

After establishing their roles, the SPT then identified the guidelines for decision-making across stakeholder groups, specifically addressing who would be involved in making decisions about the content of the strategic plan and how those decisions would be made. I provided a training session on three different decision-making processes—majority vote, consensus, and consent—in order to develop a common language within the SPT. Majority vote is a common decision-making process, characterized by its efficiency and clear-cut outcomes. Based on the rules of a majority vote, a decision is enacted if more than half of the group members believe it should be accepted (Tjosvold & Field, 1983). In consensus decision making, all group members discuss the issue at hand and collaboratively identify a solution that they all can accept. The consensus process facilitates greater acceptance of the group's decisions and more harmonious outcomes but can be time-consuming and challenging when unanimity is difficult to achieve (Tjosvold & Field, 1983). Consent-based decision-making, a subset of consensus decision-making, emphasizes the absence of substantial objections rather than full agreement. It allows decisions to move forward as long as no participant has a "paramount objection," thereby prioritizing the resolution of significant concerns and fostering a cooperative environment (Owen & Buck, 2020).

I introduced a decision-making matrix (shown in Table 5) that I previously created and have utilized in my consulting practice to clarify the specific decision processes involving various stakeholder groups. The SPT considered three primary

factors when making their determinations: the time capacity of each stakeholder group related to the process, the criticality of the stakeholder's acceptance of the strategy for its effective implementation, and the appropriate level of decision-making authority within the prevailing social context. The SPT emphasized the importance of unanimous agreement on the final strategic plan among its three team members. They believed that achieving consensus among the small, cooperative group could be achieved within a reasonable timeframe. The SPT then decided on a consent-based decision process for the staff members of Trees for All to ensure that there were no paramount objections to the final strategy. Historically, staff members were not given any decision-making authority for the strategic plan. This new approach stemmed from the recognition of the staff's integral role in the implementation of the strategy and the reliance on a high degree of acceptance of the decision in order for the implementation to be most successful. For the board of directors, who traditionally operated by majority vote and convened only once a month, the SPT maintained a majority vote approach as both expected and suitable, given the impracticality of achieving consensus or consent in such a context. Lastly, the SPT resolved that external stakeholders should not exert decision-making control over the organization's strategy. Instead, they should offer advice and ideas to shape the strategy, adhering to the advice process wherein a person or team seeks and considers advice but retains the final decision-making authority (Bonaccio & Dalal, 2006).

Table 5

Decision-Making Matrix

Advice	Majority rule	Consent	Consensus
The people/groups that will provide advice but will not decide.	The people/groups that will vote on the decision.	The people/groups that are involved in a process of reaching consent in the final decision.	The people/groups that are involved in a process of reaching consensus in the final decision.
External stakeholders	Board of directors	Staff members	Strategic planning team (SPT)

Project Objectives

Following the formalization of project roles and decision-making guidelines for the open strategy process, I led the team in identifying their main objectives for involving more stakeholder groups in the strategy process. The SPT pinpointed three key benefits they aimed to achieve through this process: identifying novel strategies to tackle their strategic challenges, increasing stakeholder commitment, and fostering inter-organizational collaboration. Each of these three benefits is recognized in the open strategy literature as potential positive outcomes of implementing an open strategy approach (Hautz et al., 2017; Morton et al., 2018; Seidl et al., 2019). The SPT acknowledged that for a nonprofit organization to effectively drive positive social change amid complex challenges, it requires innovative strategies, strong stakeholder confidence and commitment, and collaborative interorganizational efforts (Cruz-Suarez et al., 2014; Dentoni et al., 2018; Gooyert et al., 2019). These project objectives guided the decisions of the SPT in upcoming stages of the open strategy process.

Success Factors

In Phase 0 of the open strategy process, several success factors emerged that significantly contributed to the effective initiation of the project (see Table 6). One of the pivotal elements was the composition of the SPT, which included stakeholder representation from various internal roles within the focal organization. The multistakeholder representation brought together a range of perspectives and experiences that enriched the process. The board member on the SPT highlighted the importance of this diversity, stating, “Having this group, having diverse opinions and representation from different stakeholders within the organization was really important to the success of this.” This diversity ensured that multiple facets of the organization were considered, leading to a more comprehensive and inclusive strategy. In addition, the SPT believed that the representation of different stakeholders increased trust among their respective stakeholder groups in regard to the new open strategy approach.

The articulation of clear decision-making guidelines was also seen as instrumental in driving the success of the project. Managing expectations of stakeholders on their level of participation has been identified as critically important for organizations adopting open strategy (Hansen et al., 2022). A staff member from the SPT emphasized this, stating, “Being able to say up front who would approve . . . [and] make the strategic plan official and how that process would go was really helpful to making sure people knew how they would be involved and . . . not getting derailed by any one person.” Decision-making can be challenging, especially in the context of multistakeholder groups due to potential conflicting interests and procedural challenges (Alfantoukh et al., 2018). Establishing clear decision-making guidelines reduces process ambiguity and also decreases the risk

of the stakeholders being perceived as open washing, which means their expectations regarding their involvement are not adequately met, resulting in a loss of trust (Brielmaier & Friesl, 2023; Dobusch & Dobusch, 2019).

Table 6

Success Factors

Step	Key success factor for open strategy planning	Representative quote
Identification of project roles	Opening the planning team: Stakeholder representation from different internal roles within focal organization.	Executive director: "Having a board representative, having a staff representative, having this committed steering committee, I think is essential to the success of this."
Decision-making	Clarity of decision-making guidelines	Staff member: "Being able to say up front who would approve … [and] make the strategic plan official and how that process would go was really helpful to making sure people knew how they would be involved and … not getting derailed by any one person."
Objectives	Defining project objectives	Executive director: "Knowing exactly what we were hoping to get out of this process from the beginning helped us … make sure to meet them. … I am just so grateful that what my intentions were when we started … [were] so realized in that process and [through] everyone's experience."

Finally, aligning as a team on the project objectives was another cornerstone of success. The executive director expressed satisfaction with how the project's intentions were realized, saying, "Knowing exactly what we were hoping to get out of this process from the beginning helped us . . . make sure to meet them . . . . I am just so grateful that what my intentions were when we started . . . [were] so realized in that process and

[through] everyone's experience." This alignment ensured that every step taken was purposeful and directly contributed to the overarching goals of the project.

Phase 1: Idea Generation

The idea generation phase encompassed the planning, action, observation, and reflection stages of the idea generation process. During this phase, Trees for All engaged its stakeholders in a process of identifying strategies to address specific strategic issues the organization was facing with the aim of increasing their ability to make a positive social impact. Within this phase, the SPT engaged in one iteration of the four stages of the action research cycle. The process data collected and analyzed in this phase involved meeting recordings, memos, and artifacts from 18 hours of meetings with the SPT, an idea generation survey, and a 5-hour idea generation workshop conducted with Trees for All's stakeholders. Consistent with Phase 0, all meetings with the SPT were conducted over Zoom and utilized Miro. The idea generation workshop was conducted in person. The outcome data collected and analyzed in this phase involved the outputs of the idea generation survey and workshop in the form of strategic ideas pertaining to the Trees for All's strategic issues. Outcome data also included stakeholder feedback on the idea generation process in the form of written feedback provided at the end of the idea generation workshop and through the 8 interviews I conducted with workshop participants. Finally, outcome data also included the SPT's reflections of the outcomes of the process.

Stage 1.1: Plan

In this stage, the SPT designed and planned for the facilitation of the idea generation phase. This involved defining the strategic issues that would serve as the

central focus of the idea generation process, methodically identifying and prioritizing the stakeholders for involvement, and designing the idea generation process. The process data analyzed during this stage included the observation and artifacts encompassing 14 hours of meetings with the SPT. Throughout this stage, I shared relevant research with the SPT in order to help inform the decisions made. The following section delineates the planning stage of the idea generation phase of the open strategy process for Trees for All.

Strategic Issue Framing. The initial step of planning an idea generation process involves effectively "framing the problem" for which an organization seeks stakeholder feedback. This step, while seemingly straightforward, encompasses subtle complexities. A primary task is discerning whether the issue at hand is "strategic" in nature, a determination that typically necessitates in-depth discussion (Bryson, 2018). Bryson and Alston (2011) defined strategic issues as those involving critical policy choices or challenges that impact an organization’s mandates, mission, products or services, clientele, costs, financing, structure, processes, or management. In contrast, operational issues are generally less complex, focusing more on technical aspects like process enhancements, strategy refinements, and relatively minor deviations from the status quo (Bryson, 2018). Once strategic issues are identified, the subsequent challenge lies in articulating these issues in a manner that elicits meaningful input from stakeholders. Stadler et al. (2021) advised that organizations should strive for a balance in their strategic issue descriptions, ensuring they are sufficiently specific and detailed to prompt actionable solutions yet broad enough to avoid unduly limiting stakeholders’ creative thinking.

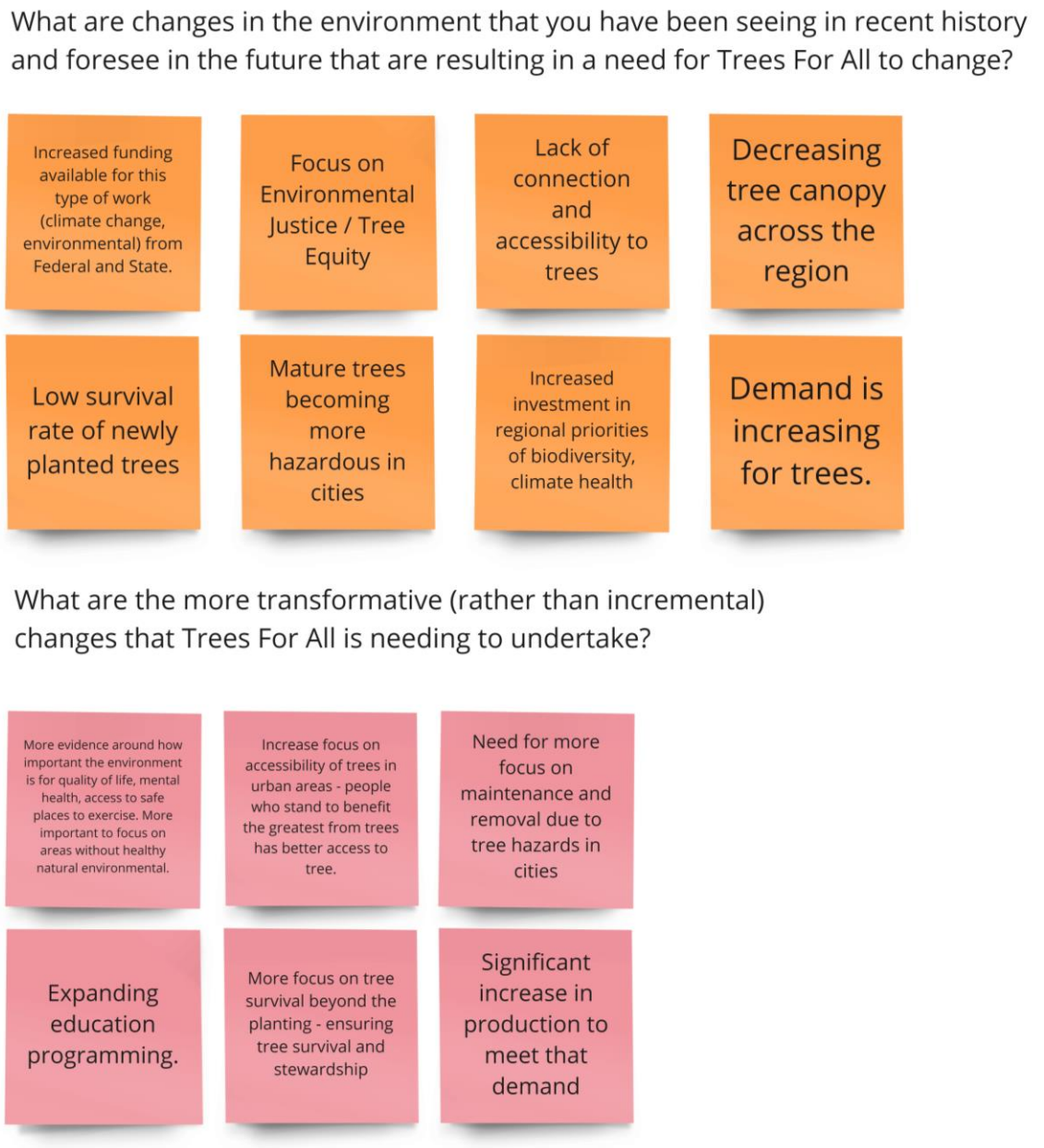
Process Description. Over the course of four collaborative sessions, I guided the SPT through a systematic process to pinpoint and define the strategic issues that would be the focal point of the idea generation process. It became apparent to me that the team lacked a unified understanding of what constituted a "strategic issue." Difficulties in formulating strategy problems in a way that is clear and impactful is a known challenge in strategy literature (Seidl et al., 2019). To address this, I provided training to clarify the distinction between strategic and operational issues, using a customized "strategic issue checklist" (refer to Appendix D) inspired by Bryson and Alston's (2011) "Operational Versus Strategic Issues Worksheet." Based on my observations, the SPT's ability to understand and discern between complex issues that warranted extensive stakeholder engagement and issues requiring a more technical and straightforward approach improved after this training.

I then facilitated brainstorming sessions utilizing modified versions of the worksheet from Bryson and Alston (2011) to assist the SPT in identifying and framing the strategic issues. Initially, the SPT identified significant external environmental shifts impacting Trees for All, necessitating significant organizational adaptations to remain effective (see Figure 3). Subsequently, the SPT consolidated this analysis into two main strategic issues, written in the form of questions. Bryston (2018) recommended that strategic issues be phrased as questions that have more than one answer. The first strategic question formulated was, "How can Trees for All most effectively contribute to growing tree canopy in low-canopy under-resourced areas of Missouri?" The second strategic question was, "How can Trees for All positively influence the survival rate of the trees that we grow and/or plant?" Both of these questions represented strategic areas

where Trees for All would need to allocate considerable resources and implement significant changes to their programs, funding, staffing, and stakeholder relationships and competencies to address (Bryson & Alston, 2011).

Figure 3

Strategic Issue Framing Initial Brainstorm

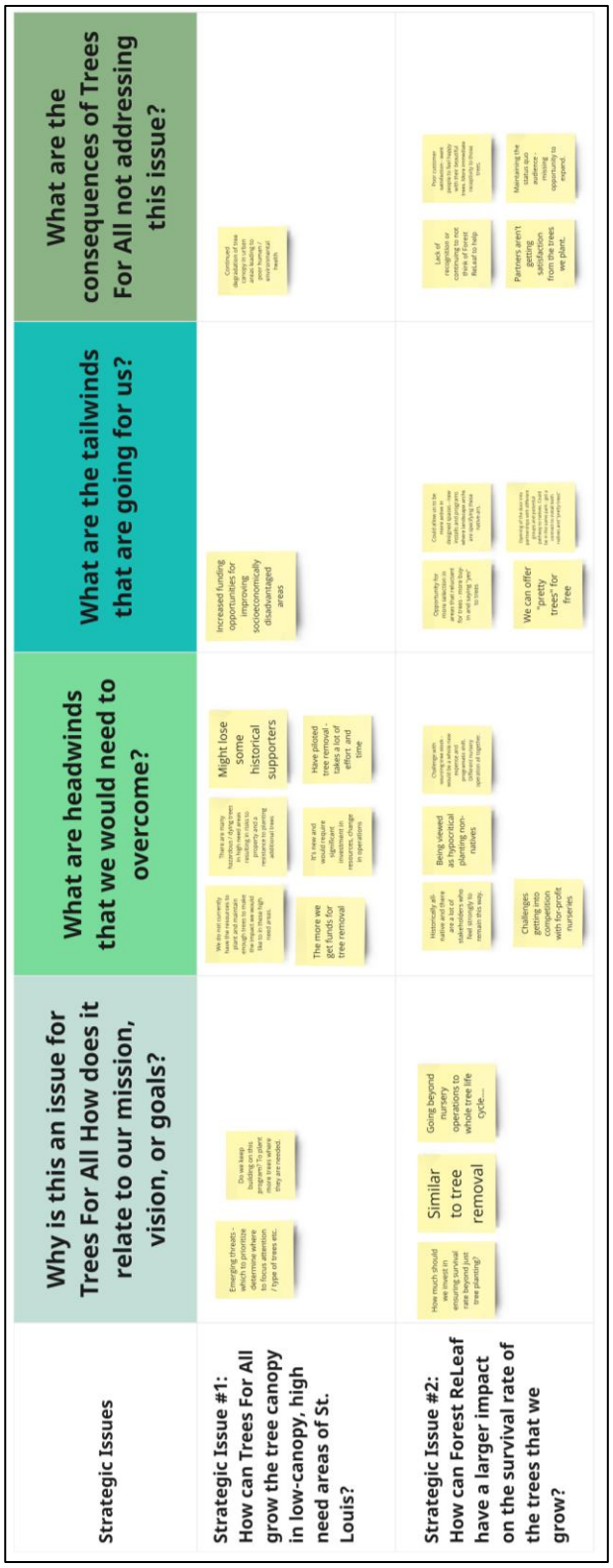


For each strategic issue, I facilitated a dialog to further explore the significance of these issues, the challenges involved, and the potential opportunities and consequences of not addressing the issues (see Figure 4). The SPT's input during this dialog then became

the basis for me to develop a concise, one-page summary for each strategic issue, designed to be disseminated to stakeholders during the idea generation process. Bryson (2018) suggested that keeping strategic issue descriptions to a page or two maximizes stakeholder attention and increases the usability of the document. Finalizing these descriptions entailed multiple iterations of feedback and refinement between me and SPT to achieve versions satisfactory to all team members (Refer to Appendix E for strategic issue descriptions).

Figure 4

Strategic Issue Definition Brainstorm

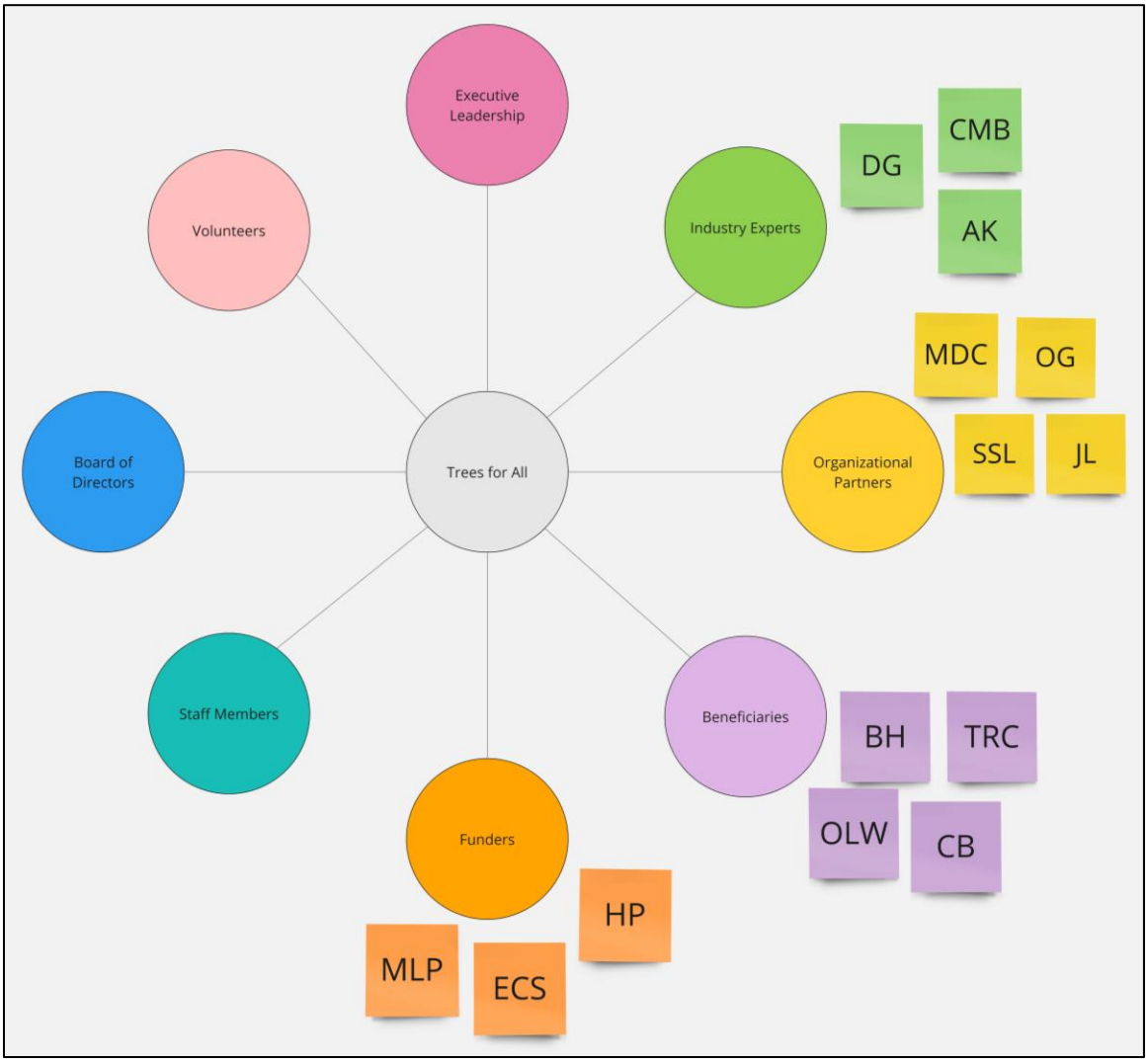


Stakeholder Identification. Stakeholder identification is a foundational process in stakeholder theory involving the identification and prioritization of individuals, groups, or organizations that affect or are affected by an organization (Heikkurinen & Mäkinen, 2018; Mitchell et al., 1997). The seminal work of Mitchell et al. (1997) introduced a dynamic model for stakeholder identification based on three core attributes: power, legitimacy, and urgency. Based on their theory, these attributes collectively determine stakeholder salience—the degree to which organizations give priority to competing stakeholder claims. This model, while well regarded, has been subject to both critiques and enhancements (Wood et al., 2021). For example, McVea and Freeman (2005) proposed a "names-and-faces" approach to stakeholder identification in which managers develop a relational understanding of stakeholders as individuals, moving beyond generic group classifications that often neglect both ethical and practical nuances. Another noteworthy contribution is by Crane and Ruebottom (2011), who emphasized the importance of social identity groups in the identification and understanding of stakeholders. Their approach involves cross-mapping traditional stakeholder categories (e.g., customers, employees, competitors) with social identities (e.g., age-based groups, racial-based groups) to develop a more intricate perspective of the power, legitimacy, and urgency of stakeholder group claims. Bundy et al. (2013) introduced the "strategic cognition view of issue salience" which suggests that managers are inclined to prioritize stakeholder issues that resonate with their existing beliefs and that align with organizational priorities. These studies underscore the complexity and evolving nature of how organizations recognize and prioritize the plethora of stakeholders and their interests.

Process Description. After defining strategic issues, the SPT focused on identifying stakeholders for the idea generation process. This was guided by a stakeholder map based on Freeman's (1984) hub-and-spoke model (see Figure 5). The SPT began by identifying Trees for All's stakeholder groups, such as organizational partners and the board of directors. While most organizations practicing open strategy typically omit external stakeholders, the SPT recognized their significant value and chose to include them (Hautz et al., 2019). This decision was rooted in the belief that external stakeholders could contribute more novel ideas and the recognition of the critical role these stakeholders play in the successful implementation of Trees for All's strategy. Following the guidance of Stadler et al. (2021), who recommended including at least half of the participants from outside the organization to enhance the originality of ideas, the SPT strategically opted for a higher proportion of external stakeholders compared to internal ones.

Figure 5

Stakeholder Map



Following the initial stakeholder categorization, the SPT proceeded to identify specific organizations within each group, prioritizing them based on a range of variables (detailed in Table 7). In this selection process, the SPT applied two of the stakeholder identification criteria proposed by Mitchell et al. (1997): power and legitimacy. Interestingly, they deemed Mitchell et al.'s third criterion, urgency, as nonessential for

stakeholder selection in this context. The aspect of stakeholder power was particularly emphasized since prioritizing funders had a considerable influence on Trees for All's access to resources. The executive director highlighted the importance of their involvement, stating that including influential funders would "help them hear and understand the issues so we can have a more authentic collaboration [and] . . . help donors to expand their perspectives." By funders better understanding Trees for All's mission, the SPT hoped that this would encourage further commitment and support for the organization.

Table 7

Stakeholder Identification Variables

Stakeholder salience variable	Author	Representative quote
Power	Mitchelle et al. (1997)	Executive director: "I think they would come especially since they are writing in that half a million dollars for Trees for All. … It might be helpful so that they can better understand what we do, and they work with some very influential nonprofits."
Institutional legitimacy	Abzug & Galaskiewicz (2001)	Executive director: "They are experts in the space and could share best practices. … Maybe they are nailing it on something that we are trying to figure out?"
Constituent legitimacy	Abzug & Galaskiewicz (2001)	Staff member: "They are very connected to the community that we are going to bring more into the fold."
Congruence with organizational priorities *(*strategic cognition view of issue salience*)*	Bundy et al. (2013)	Executive director: "I think we should invite them because we want to lean into public health as a priority, and that's what they do."
Social identity	Crane & Ruebottom (2011)	Executive director: "There's a group of younger foresters that are starting to take over the 'old guard.'"
		Staff member: "They are both women of color, which is good."
Openness to experience	McVea & Freeman (2005)	Executive director: "I don't think he should be there. … He brings a historical perspective, but I think he'd be a burden in discussing what we could be."

The SPT found two distinct categories of legitimacy to be relevant in the identification of stakeholders: institutional legitimacy and constituent legitimacy. Institutional legitimacy relates to stakeholders who have earned recognition through their educational, professional, and managerial credentials. This type of legitimacy emphasizes adherence to established norms within institutions. In contrast, constituent legitimacy is determined by how effectively an organization represents the interests and identities of the constituencies it serves (Abzug & Galaskiewicz, 2001). During the stakeholder selection process, both forms of legitimacy were deemed crucial. For instance, the executive director highlighted the value of the organizational partner's institutional legitimacy, noting their expertise and potential to contribute best practices. This recognition was based on their established credentials and expertise, which were seen as beneficial for the process. Conversely, when evaluating a different stakeholder, their constituent legitimacy took precedence. This was attributed to their close connection with the community and their ability to represent the interests of those who Trees for All aims to engage with more closely. The executive director remarked, “They are very connected to the community that we are going to bring more into the fold,” emphasizing the importance of stakeholders who are intimately linked with the beneficiaries of Trees for All's initiatives.

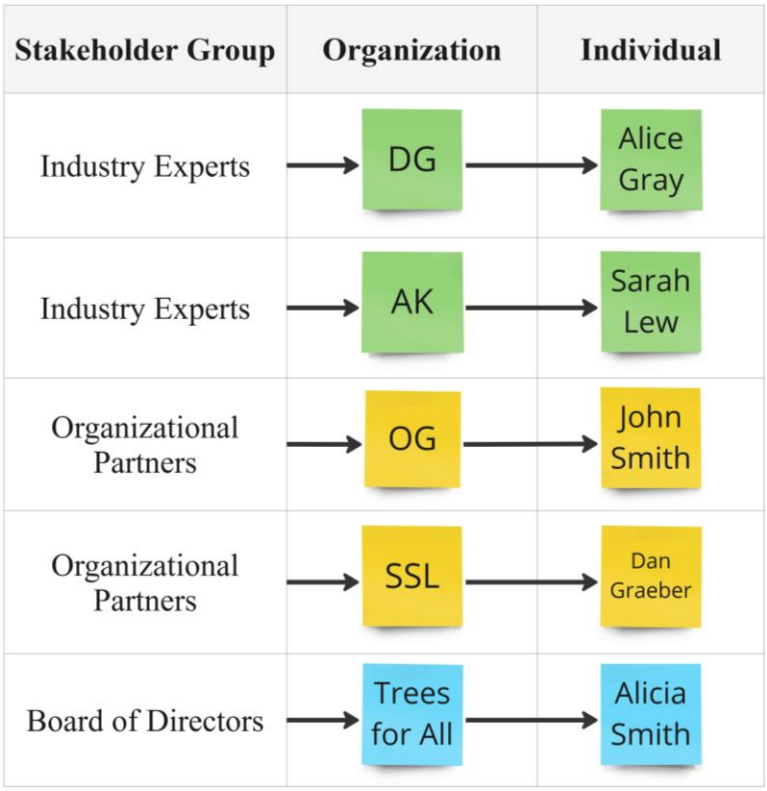
The alignment of stakeholder concerns with management priorities was a significant factor in the selection process, reinforcing the strategic cognition view of issue salience as proposed by Bundy et al. (2013). This perspective suggests that the congruence of issues to an organization's strategy is a key determinant in stakeholder engagement. Illustrating this, the executive director referenced an organizational partner

specializing in public health, a sector of increasing importance to the organization. They stated, "I think we should invite them because we want to lean into public health as a priority." This comment underscores a strategic approach to stakeholder selection: inviting stakeholders whose areas of expertise and concern mirror the priorities that management identifies as crucial for the organization's direction and goals.

In the final phase of the selection process, the SPT carefully identified individual stakeholders within the chosen organizations for prioritization (refer to Figure 6). A key factor in this decision-making was the consideration of social identity across all stakeholder groups, emphasizing age, race, and gender. As Crane and Ruebottom (2011, p. 78) stated, “We need to consider stakeholders in terms of their social identities and the different interests, ideologies, values and expectations these identities bring in relation to the firm.” The SPT placed special emphasis on including racial minorities and women. This required an intentional effort to identify stakeholders with these identities given that the urban forestry industry is largely dominated by white males (Bardekjian et al., 2019; Kuhns et al., 2002). The team also prioritized the inclusion of several young urban foresters, believing their insights to be more aligned with the organization's future.

Figure 6

Names-and-Faces Stakeholder Identification



Note: These names are pseudonyms

Beyond social identity, the individual characteristics of stakeholders were also critical in the prioritization process, reinforcing the "names-and-faces" approach to stakeholder identification proposed by McVea and Freeman (2005). The SPT favored stakeholders known for their "openness to experience," one of the five major personality traits that is associated with a willingness to embrace new ideas and experiences (McCrae & Greenberg, 2014). This trait is also found to be correlated with creativity, divergent thinking, and the generation of high-quality ideas (Friis-Olivarius & Christensen, 2019; McCrae, 1987; McCrae & Costa, 1997). Given the emphasis on divergent thinking in the idea generation process, the SPT deemed that "openness to experience" was a crucial

individual-level trait for stakeholder selection, sometimes taking priority over expertise. For instance, when considering the inclusion of an industry expert, the SPT valued their expertise but ultimately prioritized another stakeholder who exhibited higher levels of openness. This decision reflected the team's strategic approach to prioritize stakeholders who were not only knowledgeable but also adaptable and open to innovative ideas, thereby enriching the process with diverse and forward-thinking contributions.

Ultimately, the SPT identified 69 stakeholders from 51 organizations, forming 14.5% internal and 85.5% external participants (see Table 8 for details). This highly inclusive and strategically curated selection of stakeholders underscored SPT's commitment to fostering innovative and diverse perspectives, while increasing the commitment of stakeholders they depend on.

Table 8

Stakeholder Groups Identified

Stakeholder group	Number of stakeholders included	Percentage of total
Internal stakeholders		
Staff members	3	4.3%
Board members	5	7.2%
Executive management	1	1.4%
Volunteers	1	1.4%
Total internal stakeholders	10	14.5%
External stakeholders		
Beneficiaries	14	20.3%
Funders	10	14.5%
Industry experts	3	4.3%
Organizational partners	32	46.4%
Total external stakeholders	59	85.5%
Total stakeholders	69	

Idea Generation Process Design. The final step in the planning stage of the idea generation phase was the design of the open strategy process. This design was informed by key considerations from open strategy literature, encompassing the choice between digital methods, such as surveys, and analog methods, like workshops (Hautz et al., 2019). Moreover, within these chosen methodologies, it was important to select specific idea generation practices in alignment with the overarching objectives of the process. In light of the SPT's objective of generating novel ideas from stakeholders during the idea generation phase, insights from the creativity literature were utilized by me to shape the process design. Situational factors, including the physical environment and group composition, distinctly influence group creativity during idea generation (Atchley et al., 2012; Plambech & van den Bosch, 2015; Stahl et al., 2010). Additionally, the choice of specific practices play a separate and crucial role in enhancing this creative process (Girotra et al., 2010; Mullen et al., 1991; Oppezzo & Schwartz, 2014; Paulus & Yang, 2000). The subsequent section presents insights gleaned from the literature on both situational factors and practices that were instrumental in shaping the SPT's approach to designing the idea generation process.

An often overlooked aspect in the open strategy and strategic planning literature is the influence of the physical setting on the experience and outcomes of the idea generation process. I found a lack of guidance regarding the choice of physical setting in the seminal texts, which otherwise provided detailed best practices for group strategizing (Bryson, 2018; Stadler et al., 2021). Researchers from other domains have shown that an immersion in natural outdoor settings enhances creativity due to the restorative effects of the outdoors on human cognitive functions (Atchley et al., 2012; Plambech & van den

Bosch, 2015). Additionally, group composition and cohesion are situational factors that affect creativity. Research has indicated that cultural diversity positively impacts creativity and enjoyment (Stahl et al., 2010), and more cohesive groups with stronger mutual interests tend to exhibit higher creative performance (Craig & Kelly, 1999; Moore, 1997).

There is significant research on how various practices influence the creative output of individuals and groups. Studies from the creativity literature have revealed that despite the popularity of brainstorming—generating ideas in a group without critical evaluation—it is less effective for producing high-quality ideas compared to other methods, especially in larger groups (Mullen et al., 1991). Groups operating individually, without interaction, often outperform brainstorming groups (Diehl & Stroebe, 1987; Mullen et al., 1991). Other research suggests that "brainwriting," first writing ideas individually before collaborating, is more productive and enjoyable than individual writing without any collaboration (Girotra et al., 2010; Paulus & Yang, 2000). Another practice that promotes creativity in the context of idea generation includes walking, particularly outdoors. Oppezzo and Schwartz (2014) discovered that walking enhanced creative divergent thinking in 81% of participants, using the Guilford alternate uses test, with this boost persisting even when participants sat down afterward. Mindfulness practices, such as open-monitoring meditation, also foster divergent thinking and improve mood, further enhancing creativity (Colzato et al., 2012; Henriksen et al., 2020).

Additionally, research has shown a positive relationship between playfulness and creativity (Bateson & Martin, 2013; Glynn, 1994; Mainemelis & Ronson, 2006). Play introduces elements of surprise and uncertainty, transforming work tasks into activities

not perceived as obligatory or driven by efficiency (Mainemelis & Ronson, 2006). Play fosters divergent thinking, reduces risk aversion, and opens up more novel possibilities than traditional work approaches (Glynn, 1994; Mainemelis & Ronson, 2006), and it also induces a positive effect that in itself promotes divergent thinking (Mainemelis & Ronson, 2006). However, in reviewing open strategy and strategic planning literature, there was a notable scarcity of information at the intersection of play, its effects on group creativity, and the identification of novel organizational strategies.

Process Description. The SPT collaboratively designed the open strategy idea generation process over four meetings. One of the initial decisions was to implement a blend of digital and analog practices, capitalizing on the broader inclusivity afforded by digital means while simultaneously enhancing opportunities for interorganizational collaboration, a strength characteristic of analog methods (Brielmaier & Friesl, 2023; Hautz et al., 2019). To gather diverse perspectives on the organization's strategy, the SPT conducted a survey encompassing all 69 of the stakeholders that they identified. However, in alignment with established analog practices in open strategy (Brielmaier & Friesl, 2023), the in-person idea generation workshop was restricted to 32 select stakeholders.

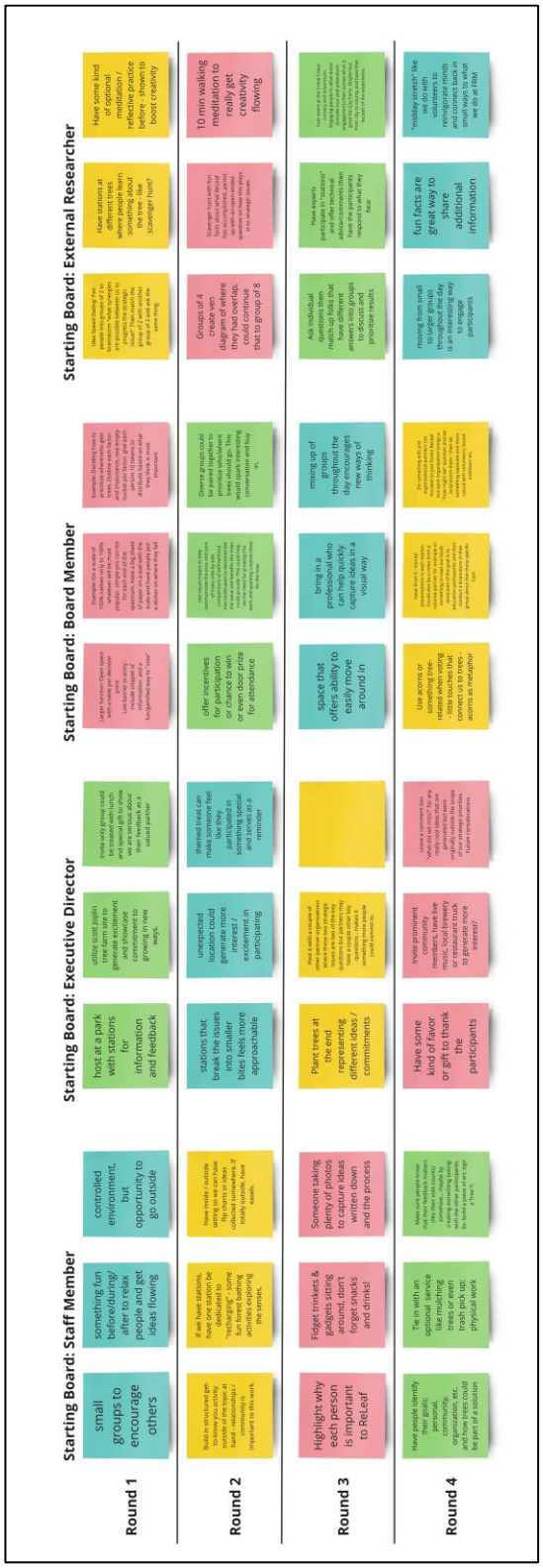
Regarding the digital survey, the SPT's primary focus of their design decisions was on strategies to maximize participant engagement. Brielmaier and Friesl (2023) discussed how participation in open strategy is influenced by "attention contests," with digital methods often competing with the day-to-day routines of participants. For instance, IBM utilized digital open strategy methods and saw only a 3% active engagement from 350,000 invited employees (Brielmaier & Friesl, 2023). The SPT

recognized that the perceived ease of use of digital tools plays a critical role in participation levels; cumbersome tools can frustrate users and deter engagement (Hutter et al., 2017). To increase the likelihood of participation, the SPT chose to use Google Forms, a user-friendly web-based survey tool. Additionally, I produced a concise, 5-minute video featuring the executive director discussing Trees for All's strategic issues, intending to capture and retain the stakeholders' attention.

Drawing on research about factors and practices to enhance group idea generation, the SPT designed an idea generation workshop. To generate ideas about the design itself, I facilitated a virtual brainwriting session with the SPT (See Figure 7 for a screenshot of the outcome). In this session, participants were instructed to independently type out three ideas for potential practices to incorporate into the workshop. After a 5-minute interval, they virtually “moved” to the next team member’s board to review and build upon those ideas with three additional ones. The process was repeated over four rounds, yielding 48 ideas about the potential structure of the workshop over the course of 20 minutes. Examples of these ideas include, “build in structured get-to-know-you activity outside of the topic at hand—relationships/community is important to this work” and “mixing up of groups throughout the day to encourage new ways of thinking.”

Figure 7

SPT Brainwriting Activity



Upon reviewing the ideas, the SPT identified the predominant themes and deliberated on their preferred ideas, discussing the reasons behind their choices. I then developed an agenda and workshop practices, integrating empirical research findings with the SPT's ideas. In this process, I identified a novel approach to idea generation called “25/10 crowd sourcing,” which I modified to be used in the project (Liberating Structures, n.d.). The “25” in the title refers to the highest total score each idea can achieve, and the “10” refers to the top 10 ideas identified through the group ranking process. This activity enables large groups to rapidly create and prioritize ideas. Central to this approach is brainwriting and an element of walking, contributing to a playful and dynamic experience due to its unanticipated aspects. Along with the 25/10 crowd sourcing practice, I proposed other activities that incorporated mindfulness, walking, and the use of multiple iterations of breakout groups, all designed to encourage novel ideas and facilitate dialogue among a diverse array of participants.

After extensive feedback and collaborative revisions between the SPT and me, the final agenda for the workshop was established (see Appendix F). In line with research highlighting the creative benefits of outdoor settings and nature immersion, I recommended hosting the workshop at my university, specifically in a spacious room with large windows offering a clear view of numerous trees close to a courtyard rich with native plants and natural elements, including a water feature. With the venue and agenda finalized, the SPT took charge of the logistical aspects, including inviting participants and organizing the day's events.

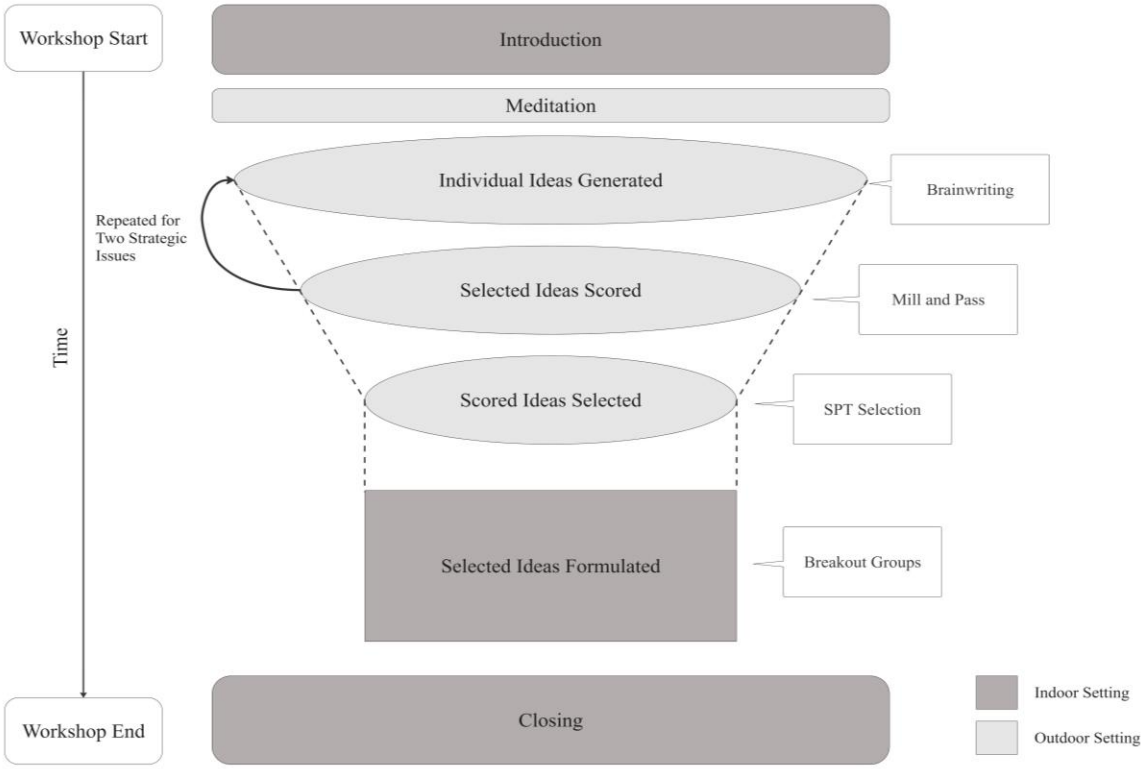
Stage 1.2: Act

In this stage, the SPT conducted the idea generation phase of the open strategy process. This involved two primary activities: launching an idea generation survey and facilitating a 5-hours idea generation workshop. The process data analyzed in this stage encompassed observations and artifacts from both the survey and the workshop. The outcome data collected and analyzed included the ideas generated from stakeholders through these digital and analog practices. The following sections offer both a process account of this stage along with the respective outcomes of the ideas generated. The ensuing section provides a detailed account of the process and outcomes of this stage.

Process Account. The idea generation survey was administered two weeks prior to the workshop and remained open until the workshop's conclusion. It was distributed to all 69 stakeholders, of which 27 completed. This response rate, although seemingly modest, aligns with prevailing trends of participant engagement in digital open strategy practices as noted by Brielmaier and Friesl (2023). The SPT deemed this level of participation satisfactory given the context. Invitations to attend the workshop were extended to 32 stakeholders. Of these, 19 attended the event, not counting the 3 attending SPT members. Figure 8 depicts the workshop's structure, which is further elaborated upon in the following section.

Figure 8

Workshop Structure



Introduction. The workshop commenced with an informal lunch, fostering opportunities for participants to build relationships. As attendees settled in, the executive director extended a warm welcome and expressed appreciation for the participant's presence. Following this, I introduced myself and facilitated a round of introductions. Each participant shared their name, affiliated organization, and their motivation for accepting the invitation to this open strategy workshop. This session allowed participants to familiarize themselves with each other, paving the way for future connections.

After these introductions, I outlined the day's agenda and the workshop's ground rules:

- Diversity of ideas and perspectives over consensus and decision-making.
- Embrace a “Yes, and” mindset over a “But this won’t work because…” mindset.
- Impactful ideas can come from anyone over the ideas of those with higher titles or who have the most expertise dominating.

These ground rules were designed to encourage diverse perspectives and minimize power asymmetries between participants (Hautz et al., 2017). Subsequently, the executive director and staff member from the SPT presented the two strategic issues (Appendix E) that would be discussed. Participants received copies of the document detailing the two strategic issues that they could reference throughout the workshop. An intriguing element of the day involved the use of pseudonyms. On the back of their name cards, participants found “alter egos” crafted by a staff member from Trees for All and assigned by the SPT. These pseudonyms, humorous puns on tree names, included “Lady Magnolia” and “Paul N. Allurgy” (a play on pollen allergies). This light-hearted approach elicited laughter and set a convivial tone for the workshop. Participants were instructed to keep their pseudonyms a secret and assume their alter ego identities for the upcoming exercises. By using pseudonyms rather than real names throughout the workshop, this ensured that participants were unable to discern which ideas came from whom. The introduction concluded with an invitation for the participants to move to the courtyard, marking the transition to the next activity.

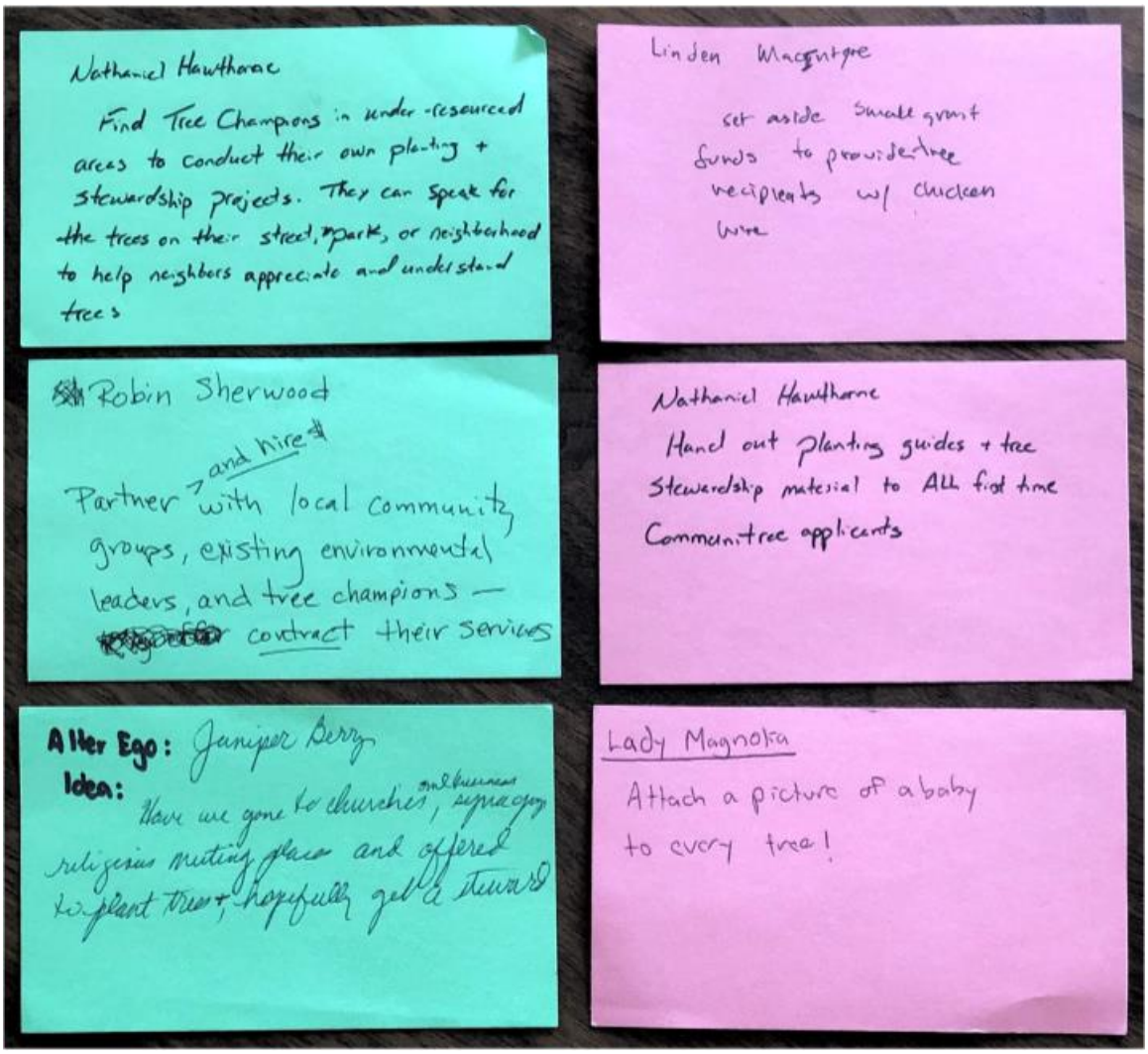
Meditation. The session transitioned to the outdoor courtyard, where I led a 5-minute open-monitor standing meditation. This exercise encouraged participants to simultaneously be aware of their internal bodily sensations and the external environment,

eschewing focus on any single object, as suggested by Lippelt et al. (2014). Following this, participants were gently guided to engage in a slow, mindful walk, paying close attention to their movements within the natural landscape surrounding them. I instructed the group to "Wander slowly and notice what is in motion around you." This meditative walking lasted for an additional 5 minutes, culminating in a 10-minute meditation segment. This practice was grounded in research that indicates that even brief mindfulness activities can enhance creativity (Colzato et al., 2012; Henriksen et al., 2020; Schootstra, 2016). The walking meditation was designed to not only cultivate mindfulness but also to stimulate creativity through the process of walking itself (Oppezzo & Schwartz, 2014).

25/10 Crowdsourcing. After the meditation practice, participants were asked to find a solitary spot outdoors to brainstorm ideas for the first strategic issue. Equipped with green index cards, they were instructed to jot down one idea per card, adding their pseudonym for reference (see Figure 9). A 10-minute period was allocated for this brainwriting exercise, during which participants, on average, generated three ideas each. At the conclusion of this session, participants were asked to select their top idea and deposit the others into a communal bucket, reducing the total number of ideas from 67 to 23.

Figure 9

Idea Cards



The subsequent activity involved a “mill and pass” process, adapted from the 25/10 Crowdsourcing method. Participants circulated, exchanging cards randomly without reading them, a process that sparked considerable laughter. I overheard two participants enthusiastically declaring the process to be “fun.” After about 30 seconds, I rang a bell, signaling participants to read the card in their hands. They were then asked to rate the idea on a scale of one (low score) to five (high score), judging its effectiveness in

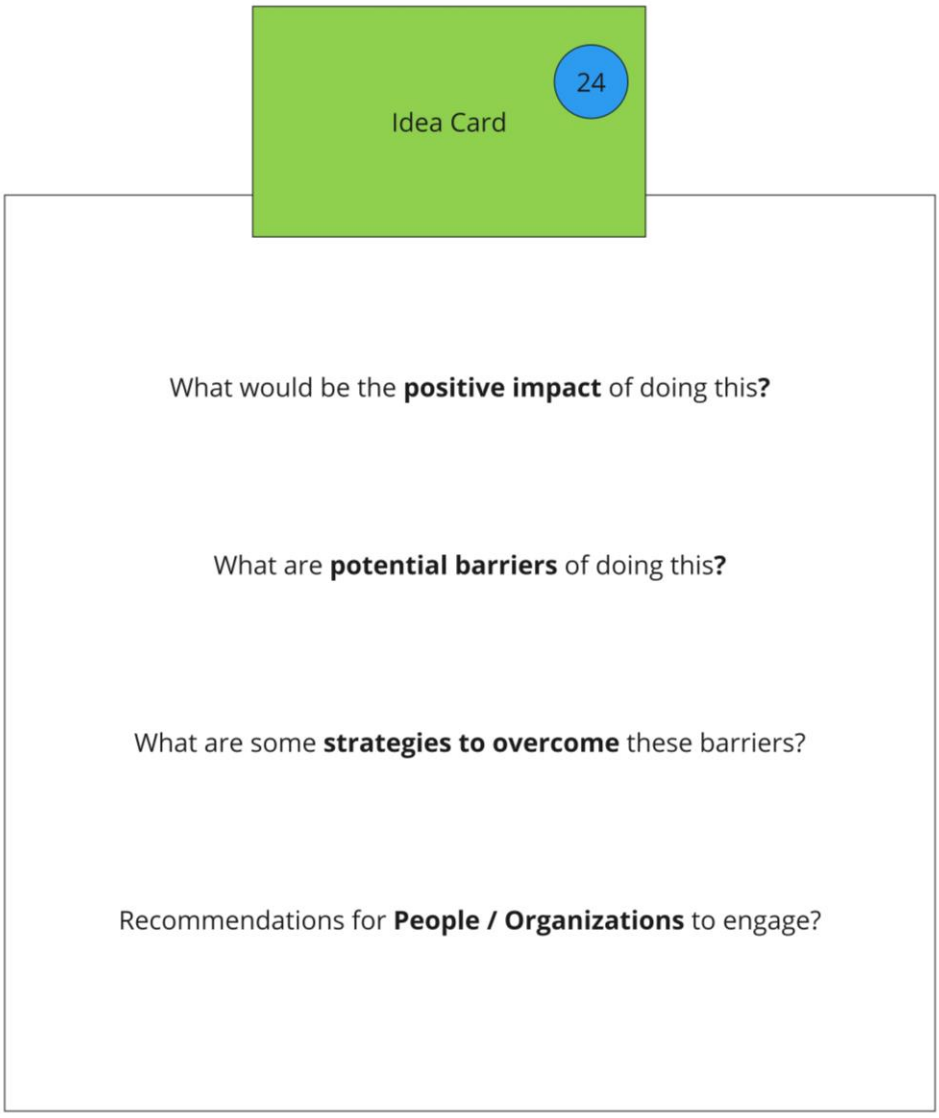
addressing the strategic issue. The process of mill and pass continued until I rang the bell again, prompting another round of scoring. Participants were instructed not to view the scores on the back of the card until they had decided their own score, to avoid being influenced by previous ratings. The mill and pass process continued for five rounds until each participant had scored a total of five cards. I then directed them to tally the five scores on the backs of their cards. The highest possible score was 25 (achieved if five participants each awarded a score of 5) and the lowest was 5 (if each participant assigned a score of 1). I then initiated a countdown, started by asking, "Who has a 25?" followed by "Who has a 24?" and so on. Participants holding cards with the highest scores were invited to read aloud both the idea and the name of the alter ego who had authored it. This process allowed participants to learn from each other's innovative ideas and to delight in the humorous puns, which elicited significant laughter throughout the process.

The process was then repeated for the second strategic issue. During this round, participants received red index cards, as opposed to the green ones used previously, to easily distinguish the ideas for each issue. They were invited to find a solitary spot and engage in a 10-minute brainwriting session. This time, participants generated an average of six ideas each, doubling their output from the first session. In an interview, one participant noted that the process felt easier the second time, having become familiar with it and inspired by the novel ideas from the first round. Once the mill and pass process concluded, all idea cards were collected, and participants were directed to return inside for a 10-minute break before starting the idea formulation activity. During the break, the SPT reviewed and selected 12 of the highest-scoring ideas from both strategic issues for further development in the next phase of the workshop.

Idea Formulation Activity. The purpose of the idea formulation activity was to refine the top ideas emerging from the 25/10 Crowdsourcing activity. This activity unfolded over three brainstorming rounds. During each round, in different corners of the room, four flip charts were positioned, each with one idea selected by the SPT from the previous activity taped onto it. Additionally, four questions were listed on each flip chart, guiding the participants in their discussions (refer to Figure 10). Participants were encouraged to join a group discussing an idea that piqued their interest or where they felt they could contribute their expertise. Group discussions notes were recorded directly on the flip charts. Each round was allocated 25 minutes. My observations indicated varying levels of engagement across groups. As the executive director noted, “Some breakout groups were highly generative with robust discussions, while others appeared stagnant and repetitive.”

Figure 10

Idea Formulation Chart



Closing. After the three brainstorming rounds were completed, the group reconvened to conclude the workshop. Participants were given feedback forms to share their experiences, with 17 of them submitting completed forms. Everyone was invited to share insights from the day's activities. The executive director once again expressed gratitude to the stakeholders for their participation.

Postworkshop. Following the workshop, I undertook the task of transcribing the 137 ideas that were generated on idea cards during the event into a digital format. I then the synthesized strategic ideas gathered from the idea generation survey and workshop into a spreadsheet. In aggregate, 263 distinct ideas were generated, of which 126 were derived from the survey responses, and 137 were elicited from the workshop activities. I systematically coded these ideas, ultimately identifying 37 strategic themes. These themes were then compared to the existing strategic plan devised during the closed strategy process that Trees for All had used the previous year. Notably, 16 out of the 37 themes were not addressed in the current strategic plan. I created a summary of the themes generated from the idea generation phase and provided it to the SPT. In parallel, the SPT sent a follow-up email to the participants, thanking the stakeholders for their contributions. With these tasks complete, the project advanced to the observe stage of the action research cycle.

Stage 1.3: Observe

After successfully implementing the action phase in the idea generation cycle, I transitioned to the observe phase to evaluate the impact of the actions taken. Three main sources of data were used in this stage to understand the impact of the open strategy process on Trees for All's ability to enhance their social impact: (a) written feedback from participants of the idea generation workshop, (b) interviews with participants of the idea generation workshop, and (c) observations of the process by the SPT.

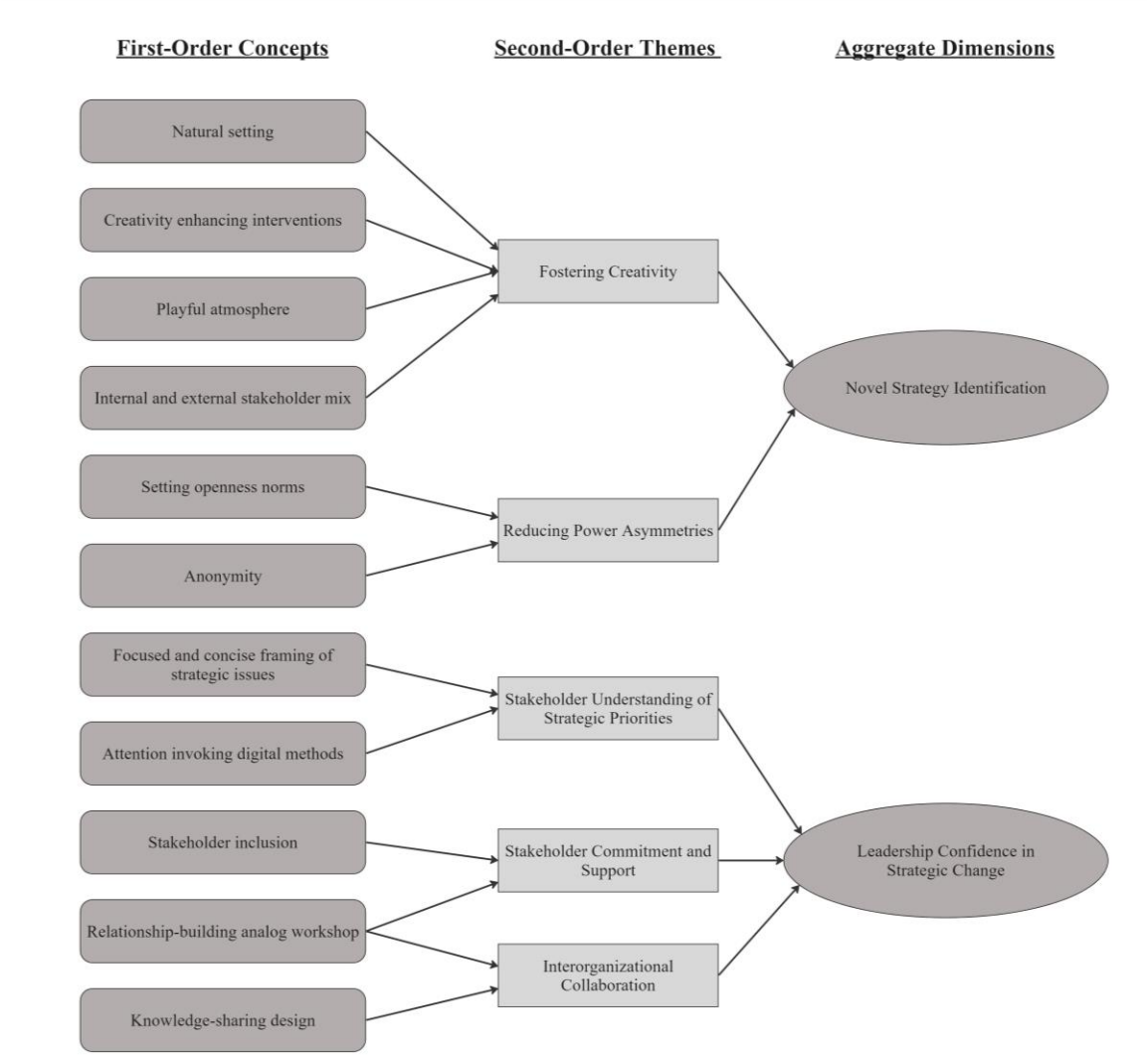
Out of the 19 idea generation workshop participants, 17 completed feedback forms during the workshop's closing section. I transcribed and uploaded these responses to NVIVO (Version 12), a software tool designed for organizing, analyzing, and

extracting insights from qualitative data. The feedback form inquired about the participants' willingness to participate in a follow-up interview with me. I contacted those who agreed, ultimately resulting in interviews with 8 participants. Semi-structured interviews were conducted, utilizing the questions outlined in Appendix B. These sessions took place on Zoom, with each interview spanning roughly 30 minutes. The interviews were transcribed using a professional transcription service, and the transcriptions were inputted into NVIVO. Additionally, a meeting with the SPT was held to discuss their observations of the idea generation process. The meeting was recorded, transcribed, and the resulting transcript was subsequently uploaded into NVIVO for analysis.

For data analysis, a qualitative approach was adopted, starting with open coding as per Strauss and Corbin (1998). This process involved assigning descriptors to each interview and survey statement. It was followed by axial coding, in which codes were clustered into specific categories. The resultant data structure is illustrated in Figure 11.

Figure 11

Data Structure



Novel Strategy Identification. In this section, the findings are reported and how the open strategy process enabled the identification of novel strategies is discussed. One of the primary reasons organizations open up their strategy process is to generate novel strategies that might not be identified in closed strategy processes (Seidl et al., 2019; Stadler et al., 2021). Generating ideas with stakeholders outside of the executive

leadership team can lead to significantly more innovative ideas (Chesbrough & Appleyard, 2007). This is particularly important for organizations facing fundamental shifts in their environment that are forced to grapple with strategic issues with no clear answers (Bryson, 2018; Hansen et al., 2022; Stadler et al., 2021). Given the significant shifts in Trees for All's external landscape, one of their primary goals was to increase the novelty of strategies through open strategy, aiming to tackle the complex issues they faced.

Based on the thematic analysis of ideas generated and the SPT's observations of the process, the goal of generating novel ideas was sufficiently achieved. Of the 37 unique themes stakeholders generated throughout the open strategy process, 16 (43%) were strategies previously unconsidered by Trees for All. As the executive director stated, "The strategy from the closed process is really about what we do . . . . [The open strategy process] was the next step of how and what we should be doing, and what we aren't yet doing, but still need to consider. I think that's a really valuable way to stay current and impactful." The analysis identified two key contributors to the realization of novel strategies through the process: creating conditions for creativity and reducing power asymmetry.

Fostering Creativity. Several factors contributed to creating the conditions for creativity during the idea generation process: (a) the natural setting, (b) the creativity enhancing interventions, (c) a playful atmosphere, and (d) the internal and external stakeholder mix. Table 9 presents representative quotes for each concept associated with this theme. Stakeholders frequently remarked on the impact of the natural setting on their experience and ability to focus and generate ideas. One staff member participant

observed, “I do think you feel a little bit more open and free being outside versus in a four-wall room that can hinder your creative spirit and your creative thinking, but when you're outside looking at trees, you have a little bit more freedom and mental space.” When asked if the outdoor setting influenced the quality of their ideas compared to being indoors, an organizational partner responded, “Two hundred percent, absolutely. Especially since we were strategizing for an organization that integrates trees into human environments and connects people to trees and their benefits, . . . I would say that campus was a pretty good nature-rich space . . . [and] was a significant qualitative contributor to the experience.”

Table 9

Fostering Creativity

First-order concept	Example quote
Natural setting	Staff member: “I do think you feel a little bit more open and free being outside versus in a four-wall room that can hinder your creative spirit and your creative thinking, but when you're outside looking at trees, you have a little bit more freedom and mental space.”
Creativity enhancing interventions	Staff member: “That solo time of going out there and just sitting quietly, checking on what moves and hearing the birds and the insects or watching the grass blow in the wind, all those things I think are important to get you in the right mindset.”
	Organizational partner: “I think that physical movement is a notoriously underrated and underused part of human interaction. Mostly we sit still in chairs. We're, like, in a box. … By physically interacting with one another, … passing the cards, … tapped into connectivity and exchange and some of the dynamics that enable us as human beings to open up in a creative way, in a problem solving or a discovery way, but we could do that with little to no personal risk.”
Playful atmosphere	Industry expert: “People think well when they're enjoying themselves.”
	Staff member: “I think it helped with setting the tone of this as not, like a super. … It was still official and meaningful but not very serious formal. It broke out of the like, ‘I am strategic planning,’ to more of the, ‘I am creating ideas.’ It's okay if they're goofy because they're going to be from Paul N. Allurgy or something. I think creating some space for a little bit of whimsy … I know I was actively giggling through a lot of the passing process.”
Internal and external stakeholder mix	Staff member: “In some of those group sessions, with people bringing experiences from their organizations … it shed some light on things that we do or things that I could do differently. I was like, ‘Okay. Interesting.’ … I can at times get into a rut of, ‘This has worked. Let's just keep going," instead of, ‘Let's see other avenues.’ Being able to hear other people's experiences [and] opinions really shed light on different ways to do this urban forestry work.”

In addition to being outdoors for most of the idea generation process, the activities chosen to enhance creativity were effective in supporting idea generation. Stakeholder participants frequently mentioned their experiences with the meditative practices. One staff member noted, “Hearing the birds and insects or watching the grass blow in the wind, all those things are important to get you in the right mindset.” An organizational partner commented, “Bringing us into meditation . . . helped us feel comfortable as we moved into a brainstorming mindset.” Participants also reflected on the brainwriting exercise and the importance of having space to think alone before brainstorming. A staff member said, “There’s nothing worse than being told to come up with 20 brilliant ideas on the spot while people watch . . . . I need to process a little bit . . . . I appreciated the space provided through this process.”

Many participants also highlighted the impact of physical movement on creative thinking. They noted the uniqueness of integrating movement in the workshop, contrasting it with the lack of movement in previous strategic planning experiences. One industry expert discussed how conventional workshops can be challenging, saying, “I can have a really hard time sometimes being in conferences where you're expected to sit for eight hours and listen to something. I get fidgety. I get bored. I get tired sometimes even when I got a good night's sleep and plenty of caffeine. It doesn't feel natural to me. The movement and, again, the gentle unrushed exploratory movements for me is usually helpful [for] coming up with new ideas”

All of the practices that participants mentioned that were effective interventions in improving the conditions for creativity were analog practices conducted during the

workshop. An organizational partner who participated in both the survey and workshop noted the survey's limitations and her preference for the workshop, stating, “Frankly, [the survey] didn't tip me off to the fact that the open strategy process [and] the workshop would be as unique as it was . . . . The survey was a garden variety survey. It didn't give me any expectations that the workshop would be structured as uniquely as it was in order to tap into creativity and more right-brain stuff in the way that it did, which was surprisingly sound and enjoyable.”

The intentional cultivation of a playful atmosphere also appeared to enhance the group’s creativity. As one industry expert succinctly put it, “People think well when they’re enjoying themselves.” The 25/10 crowdsourcing activity, especially the mill and pass process and the sharing of pseudonyms, seemed to elicit much laughter and enjoyment. As a staff member participant described, “I think it helped with setting the tone of this as not, like a super . . . . It was still official and meaningful but not very serious formal. It broke out of the, like, ‘I am strategic planning,’ to more of the**, ‘**I am creating ideas**.’** It's okay if they're goofy because they're going to be from Paul N. Allurgy or something. I think creating some space for a little bit of whimsy . . . I know I was actively giggling through a lot of the passing process.” Interestingly, the number of ideas generated in the second round of brainwriting doubled after the first mill and pass process. This suggests that the playfulness experienced during that activity may have positively impacted creativity in the subsequent round of ideation.

Finally, including a mix of internal and external stakeholders supported the generation of more creative ideas. As one staff member explained, “In some of those group sessions with people bringing experiences from their organizations, . . . it shed

some light on things that we do or things that I could do differently. I was like, ‘Okay. Interesting.’ . . . I can at times get into a rut of, ‘This has worked. Let's just keep going,’ instead of, ‘Let's see other avenues.’ Being able to hear other people's experiences [and] opinions really shed light on different ways to do this urban forestry work.” The board member on the SPT reflected during our debrief, “I also think having this process of inviting outside partners in and saying, ‘Let's think outside of the box’ [or] ‘No idea is a bad idea,’ like, go to the extremes. Once you start going, like way far, crazy, wild out there, pie-in-the-sky ideas, the ones that originally felt like, ‘Oh, that's a crazy idea,’ you realize, like, ‘No, that's totally doable. That's not a crazy idea at all.’ I think it helps reframe some of the stuff we've been thinking about and realize, like, that's not that far out of the box actually.” This finding validates Stadler et al.’s (2021) research that demonstrated how the greater inclusion of external stakeholders supports the novelty of ideas generated through the heterogeneity of perspectives that are gained.

Reducing power asymmetry. A dilemma of open strategy is addressing power asymmetries, which can hinder the sharing of novel ideas out of fear of potential interpersonal risks (Hautz et al., 2017; Luedicke et al., 2017). While it is one thing to induce creativity through the practices previously discussed, it is another to create an environment where people with differential levels of power feel willing to share them. Several factors contributed to mitigating the negative effects of power asymmetries during the process, specifically, (a) setting openness norms and (b) anonymity. Table 10 illustrates data related to this theme.

Table 10

Reducing Power Asymmetries

First-order concept	Example quote
Setting openness norms	Beneficiary: "I thought it was very clear that there were no bad ideas and that we were all equal"
	Organizational partner: "Being told not to even follow up on whether or not you think this is a bad idea, we're going to write it down anyway. … It doesn't matter if ideas clash, and that's not the point."
Anonymity	"It's nice to … even the playing field when we know who the other partners are. … As being not a senior member of the community, I feel like people could see my ideas as lesser. I think pseudonyms are in line with making sure every idea is heard. Not only the age gap but also other diversity factors, it just negates everything, and I appreciate that a lot."
	Organizational partner: "It was a very delightfully disarming way for all of us with our expertise and our gravitas and all that to come into the process and not be weighted down by that, to just be able to be a person, a participant in the process. I don't think that I've ever experienced that in a process before."

During the introduction of the workshop, I presented several ground rules to establish the social norms. The use of ground rules is a practice used to facilitate effective stakeholder participation (Barrow & Mayhew, 2000). The principles that I created aimed to mitigate power asymmetries and the fear of freely sharing thoughts and opinions based on these dynamics. One key principle that was modeled was, "Impactful ideas can come from anyone over ideas of those with higher titles or who have the most expertise dominating." Establishing a ground rule that explicitly emphasizes the belief that anyone can contribute impactful ideas, regardless of their status, and contrasting that to the belief that those with higher status have better ideas, was a strategy to explicitly counteract power asymmetry. As one beneficiary stakeholder shared when reflecting on the ground rules, "I thought it was very clear that there were no bad ideas and that we were all equal."

Along with the ground rules, the use of pseudonyms during idea generation significantly contributed to minimizing power differentials. One challenge in reducing power differentials in face-to-face interactions in workshops, as it pertains to open strategy, is the lack of anonymity it affords (Hautz et al., 2019). The strategy of using pseudonyms to anonymize the participants' ideas was described by one participant as "delightfully disarming." This anonymity created an "even playing field" for participants with less organizational status or expertise to ensure their ideas were not seen as "less than" due to biases. Interestingly, it also enabled people with higher levels of power to participate without being, as one organizational partner phrased it, weighed down by their "expertise" and "gravitas." The use of anonymity, particularly during the idea generation process, was supportive in reducing the power asymmetry that can mitigate the sharing of novel and bold ideas in open strategy processes.

Leadership Confidence in Strategic Change. In this section, I report the findings related to the second aggregate dimension: how the open strategy process contributed to leadership confidence in future strategic change. Besides generating novel strategies, a primary reason that organizations open their strategy processes is to enhance support for strategies, thereby facilitating their implementation (Hansen et al., 2022). Organizations rely on stakeholders' understanding and commitment to the strategy for its realization. This is particularly crucial in addressing complex social challenges, which require not only internal support but also collaboration across organizational and sectoral boundaries to achieve desired impacts (Dentoni et al., 2018; MacDonald et al., 2019; Selsky & Parker, 2005; Tihanyi et al., 2014). Recognizing this, Trees for All engaged in open strategy to not only generate novel ideas but to also increase stakeholder

understanding and commitment to their strategic direction and to promote collaboration across their stakeholder network.

Due to the fact that the scope of this study was limited to the idea generation process and did not extend to the strategy formulation and strategy implementation stages of strategizing, a claim cannot be made based on the findings that the future implementation of Trees for All's strategic change will be improved due to the openness of the idea generation process. Based on the analysis of the stakeholders' perspectives on the idea generation process, however, I did find that the open strategy approach successfully helped Trees for All achieve its intention of increasing stakeholder understanding and commitment and collaboration between stakeholders. This, in turn, increased leadership's confidence in the future strategic changes that they planned to make. Reflecting on the process, the executive director noted, "A lot of my leadership anxiety has been that there's lots of great ideas that I have or maybe our team has, but now it's institutionalized into a strategy where [our stakeholders] are saying . . . 'We want you to go out and do this work in new and exciting ways.' . . . Doing this gives me validation and affirmation that there's support and validation behind our future growth." Through the analysis I identified three key themes (as shown in Figure 11) contributing to this strengthened confidence in the organization's strategic change: (a) stakeholder understanding of the strategic priorities, (b) stakeholder commitment and support, and (c) interorganizational collaboration. The findings related to these three themes are detailed in the next section.

Stakeholder Understanding of Strategic Priorities. A key advantage of open strategy is enhancing stakeholder understanding of an organization's strategic priorities.

As organizational leadership relies on both internal and external actors for implementing the organization's strategy, this understanding is crucial. A common obstacle in achieving greater stakeholder understanding, however, is information overload (Denyer et al., 2011; Luedicke et al., 2017). Open strategy can become an attention contest, where the goal is to capture participants' attention and provide enough information for valuable contributions without overwhelming them.

Several factors were instrumental in improving the stakeholders' understanding of Trees for All's strategic priorities during the process. These included (a) a focused and concise framing of strategic issues and (b) a Attention invoking digital methods. Table 11 provides illustrative examples related to this theme.

Table 11

Stakeholder Understanding of Strategic Priorities

First-order concept	Example quote
Focused and concise framing of strategic issues	Organizational partner: "We only had two questions that we focused on. That was really good. That was really limited. Number one. Number two. Very clear, very focused. … I got a much better understanding of current strategic focuses."
Attention invoking digital methods	Organizational partner: "Clarifying their goals and mission was really important to me, [to be] … able to watch the video and write down all the goals and have those in mind as we go into the session."
	Organizational partner: "The video was nice that it wasn't just like a random survey. That was helpful to give me an idea of what was going on. It was nice to have that ahead of time so that I knew what they were wanting to talk about."

Participants found the strategic issue framing document (Appendix E) helpful in clarifying and focusing their attention on specific issues, rather than engaging in a more general discussion about the organization. An organizational partner commented on the clarity and focus of the two strategic issues, stating, “Very clear, very focused . . . . I got a much better understanding of current strategic focuses.” Similarly, a funder noted that the framing of the strategic issues significantly enhanced her understanding of the organization's strategic focus areas. The board member from the SPT acknowledged that substantial upfront work was required by the SPT to articulate the strategic issues clearly to stakeholders but believed it was worthwhile, saying, “The work that it took to prepare to have those conversations helped bring a level of focus to what are the big questions that we’re actually asking . . . . I think that provided a level of focus that we would not have otherwise gotten to.” Following Bryson’s (2018) recommendation to keep the framing document to no more than two pages proved effective in capturing the participants' attention.

In addition to framing the strategic issues, using a video in conjunction with the digital survey was an effective approach in capturing attention and enhancing participants’ understanding of Trees for All’s strategic focus areas. Despite a general aversion to surveys among multiple participants, one organizational partner noted that watching the video, which highlighted the strategic focus areas, facilitated a better understanding of Tree for All’s strategic direction before participating in the workshop. Another partner noted that the video made it stand out from “a random survey” and appeared to be a successful tactic in the “attention contest” of open strategy (Brielmaier & Friesl, 2023).

Stakeholder Commitment and Support. By definition, open strategy is a practice of inclusion and is associated with greater trust, loyalty, and commitment among stakeholders (Brimhall, 2019; Hautz et al., 2017; Miles & Ringham, 2018; Seidl et al., 2019). Engaging a broader range of stakeholders fosters the "buy-in" essential for successful implementation of organizational strategies (Stieger et al., 2012). For nonprofits, stakeholder support can lead to beneficial behaviors such as donations, volunteerism, positive word of mouth, and other actions that bolster their social mission impact (Kong & Farrell, 2010). However, open strategy processes do not automatically guarantee increased stakeholder commitment. There is a risk of the organization being perceived as disingenuous or engaging in open washing, potentially leading to a negative view of the process (Dobusch & Dobusch, 2019).

The intentional design of Trees for All's process to boost stakeholder commitment was effective, as evidenced by the stakeholders' observations. When participants were asked how their involvement in the open strategy process influenced their view of Trees for All, the most common response included a heightened sense of respect, connection, and excitement towards the organization, along with a desire for continued engagement. One volunteer mentioned, "This process deepened my respect for Trees for All and my commitment [to the organization]." A board member commented, "This has really strengthened my connection to the organization and to trees." External stakeholders also reported an increased commitment. A funder believed that their participating in the workshop would lead to "increased engagement with Trees for All" in the future. Although this study cannot confirm that these sentiments will be translated into actions, they are promising indicators that the open strategy process achieved the

desired increase in stakeholder support. Several factors were key in enhancing stakeholders' commitment and support for the organization, including (a) stakeholder inclusion and (b) the relationship-building analog workshop. Table 12 provides illustrative examples related to this theme.

Table 12

Stakeholder Commitment and Support

First-order concept	Example quote
Stakeholder inclusion	Funder: "You cannot resolve issues for communities that you don't understand. Bringing that insight into this open process, I think, is the start of a really great dialogue through to strategy, through to resolution. I think they're smart. I think they're trying to grow how they do things and set the tone for this is a new way. If you want to talk about diversity, equity inclusion, this is what it looks like."
Relationship-building analog workshop	Executive director: "The other thing that I think really was important was that it was in person. I could see potentially trying to do a survey or trying to do some more passive open strategy [to] give us feedback, but I think having that in-person event was a really impactful and critical part of this."

Opening the strategic process is a way for organizations to embody the ideals of inclusion and diversity through including stakeholders that are traditionally excluded from strategizing processes (Hansen et al., 2022; Hautz et al., 2019). The growing popularity of open strategy aligns with societal and cultural trends towards greater transparency and inclusion (Whittington et al., 2011). A funder commented, “You cannot resolve issues for communities that you don't understand. Bringing that insight into this open process, I think, is the start of a really great dialogue through to strategy, through to resolution. I think they're smart. I think they're trying to grow how they do things and set the tone for this is a new way. If you want to talk about diversity [and] equity inclusion, this is what it looks like.” This funder mentioned that the practices of inclusion increased her confidence and commitment to the organization. This aligns with previous research indicating that a funders' inclusion in open strategy can boost their commitment to nonprofit organizations (Hansen et al., 2022).

Internal stakeholders also reported greater commitment due to their involvement. A staff member shared that being included in the process made him feel valued and affirmed his decision to join Trees for All. He stated, “Trees for All is putting employees first where it seems that . . . it just doesn't seem like that happens very often. I felt appreciated. I made a good move to come to Trees for All where they care about our input, they care about the employees, and we seem to be doing the right thing with the right people. That was just really important to me, and getting invited to this was just solidifying that my input matters.” Similarly, a board member shared her pride in the organization for “putting our money where our mouth is” and demonstrating a commitment to inclusion, rather than just “saying it.”

Along with stakeholder inclusion, the use of an analog workshop, as opposed to digital forums, also positively impacted stakeholder commitment for Trees for All. The executive director believed that conducting the strategy session in person was crucial for its effectiveness due to greater opportunity for relationship building. One organizational partner mentioned feeling disengaged when using the survey, but noted, "Being in a full room with everyone, I felt more engaged and informed as to what is possible." Another partner highlighted the limitations of digital communication, stating that although tasks can be accomplished via email, the personal connections formed in person help to "understand each other's needs and goals . . . . There's a little more investment in that relationship. Meeting in person [and] having personal connections really helps develop personal and combined goals."

While digital practices have their advantages in open strategy, in this instance, the survey's benefits did not extend to increasing stakeholder commitment and support as effectively as the workshop did.

Interorganizational Collaboration. Cooperation among stakeholders across various organizations and sectors is increasingly utilized and necessary to tackle complex societal challenges (Dentoni et al., 2018; MacDonald et al., 2019; Selsky & Parker, 2005; Tihanyi et al., 2014). Collaboration enables organizations to share resources, learn from each other, strengthen relationships, and build stakeholder legitimacy and commitment (Gooyert et al., 2019). Additionally, increased cooperation leads to efficiency gains by reducing duplicated efforts and resources (Neville and Menguc, 2006). Through this study, it was found that the open strategy process undertaken facilitated interorganizational collaboration, not just between Trees for All and their stakeholders,

but also among the stakeholders themselves. Several elements played important roles in increasing interorganizational collaboration, including (a) the relationship-building analog workshop and (b) the knowledge-sharing design. Table 13 offers example data related to the theme of interorganizational collaboration.

Table 13

Interorganizational Collaboration

First-order concept	Example quote
Relationship-building analog workshop	Organizational partner: “I actually got the opportunity to put a face to a name with some of the other partners that were there. … With the way that this facilitation was structured, there were plenty of networking opportunities that didn't seem, again, obstructive, or inconsequential.”
Knowledge-sharing design	Industry expert: “One of them had a really impressive knowledge of carbon credits, which is something that I know a little bit about. It's not something I deal with a lot in my job, but it's kind of this whole, like, urban forestry credit is becoming a thing. I'm trying to learn more about it. He had some really interesting insight to that.”

The use of the analog workshop not only enhanced stakeholder commitment but also fostered interorganizational collaboration through the relationships built during the workshop. Numerous stakeholders noted that the face-to-face format provided opportunities to connect with participants from other organizations in ways that a digital setting could not match. Specifically, an unstructured lunch proved instrumental in facilitating personal connections, enabling attendees to exchange business cards and put "faces to names." An organizational partner mentioned that developing personal relationships during the day was a "critical step along the way of being comfortable to ask for help or offer help." The analog workshop created an environment where stakeholders could form relationships with each other, thereby strengthening Trees for All's overall network.

In addition to the analog workshop, specific practices within the workshop were highlighted as crucial for enabling participants to share knowledge with each other. During the idea formulation activity, participants voluntarily joined various breakout groups and interacted with individuals from different organizations to refine the group's top ideas. Stakeholders cited instances where a knowledge exchange occurred during these interactions. An industry expert mentioned learning about carbon credits from a corporate organizational partner, which he found valuable. Another organizational partner talked about gaining insights from a beneficiary's perspective that they otherwise would not have encountered. Intentionally designing activities that encouraged participants from different organizations to exchange ideas and knowledge, rather than simply submitting ideas to the central organization, proved to be an effective method for enhancing interorganizational collaboration.

Stage 1.4: Reflect

The final stage of the action research cycle involved me reflecting on the outcomes and findings in collaboration with the SPT. An hour-long meeting was conducted with the SPT to discuss the outcomes of the open strategy process and the implications for the organization. The following themes emerged as being valuable: (a) having procedural openness, (b) having a facilitator with domain and process knowledge, and (c) thinking of open strategy as an experience.

Value of Procedural Openness. The members of the SPT expressed that their involvement in the SPT strengthened their own understanding of and commitment to Trees for All's strategy. In prior years, the executive director, assisted by an external consultant, managed the strategizing process. The change of involving a staff member and a board member was seen as crucial in designing a more effective process and enhancing their commitment and ownership of it. When asked about lessons learned that they would apply in the future, the executive director expressed interest in opening up the design and facilitation of the process even further. She stated that she would like to include an external organizational partner on the SPT to "represent that really outside voice and just keep us grounded in, like, 'What does an outside person see through this lens?'"

Given that this action research project was participatory in nature, I was careful not to conduct an open strategy on the organization, but rather to co-create a process through collaborative brainstorming meetings and rounds of feedback and iteration with the SPT. This approach increased internal ownership, organizational capacity, and learning. The board member on the SPT found that her involvement enhanced her process

thinking, leadership, and listening skills. The staff member gained valuable insights into designing stakeholder engagement processes, which aligned well with her role as a partnership manager. The executive director, initially apprehensive about soliciting input due to potential unmet expectations and the perception of open washing, learned to set appropriate expectations and design a process that balanced input with the understanding that not all suggestions would be implemented. The SPT also built relationships with one another and found the collaboration enjoyable, as reflected in a team member's closing comment during the reflection meeting, “This was fun!” which was met with unanimous agreement from the others, echoing, “Yes, it really was.”

Facilitator with Domain and Process Knowledge. When reflecting on the process, the SPT discussed the importance of the role of the facilitator throughout the planning and acting stages of the idea generation process. The executive director pointed out the unique advantage of having a consultant familiar with Trees for All, emphasizing, “It would be harder to go through this process with a consultant that was brand new to our mission and our program.” My domain knowledge supported my capacity to comprehend and assimilate organizational information, proving to be an important factor in enhancing the efficiency and effectiveness of the process. The SPT also reflected on the value of having a facilitator with process knowledge on open strategy to be able to support them to design an idea generation process that met their objectives. Given that engaging in open strategy requires additional resources and time from organizations, my active role in guiding the SPT through the planning process was seen as a necessary factor in the success of the project (Hansen et al., 2022). According to the board member on the SPT, the presence of a skilled facilitator to guide the SPT through the planning and

design of the process was “a really effective way to get the best out of all us busy people and still not feel like we were overburdened by the process.” My expertise in both the specific domain and the process of open strategizing contributed to the successful execution of the idea generation process.

Thinking of Open Strategy as an Experience. From the beginning of this experience, the SPT recognized that the objective of opening their strategy process was not merely confined to generating ideas; it also entailed enabling a more effective implementation of their future strategy by cultivating stakeholder commitment and interorganizational collaboration. To meet these objectives, I leveraged my previous experience of facilitating engaging workshops, and I integrated insights from pertinent research on practices that foster creativity and participation. A systematic approach to crafting the open strategy process was employed with the SPT, with a particular focus on the affective and relational impacts of the process.

As the executive director said, “This was absolutely about creating an experience, rather than just sitting with people around the table. I think you helped us design [the workshop in a way] that everyone had to be engaged . . . . From the moment we welcomed them, they knew that their information was valued, [that] they were there for a reason, [and] that there was an expectation that they were there representing something maybe even greater than themselves. I think that the engagement around telling people they're valued and then asking them to step up and . . . [participate] and then giving those [people] the grounding of the forest bathing, the listening, the networking, the lunch, just stuff that made it a good vibe, I think was also part of it.” The SPT recognized that the

process itself and the positive shared experiences and relationships formed were crucial for the effective implementation of Trees for All's strategy.

In summary, the final stage of the action research cycle revealed key outcomes: the value of procedural openness, the importance of a facilitator with domain and process knowledge**,** and the relevance of viewing open strategy as an experience. The participatory nature of this action research project fostered deep engagement and ownership among the SPT members, leading to a more inclusive, effective, and confident approach to strategic planning at Trees for All.

Discussion

In this study, I explored the nuances of planning and facilitating an open strategy process within Trees for All, an organization focused on enhancing their social impact. This study helped to bridge the gap between a theoretical understanding of open strategy and its practical application through the use of action research methodology. By exploring the dynamics of stakeholder involvement in the strategy process, the findings of this research not only contribute to the theoretical frameworks of stakeholder theory, open strategy, and social impact but also shed light on the practical aspects of executing open strategy. The following section outlines the theoretical and practical contributions of the findings of this research, as well as the limitations of the research and directions for future research.

Theoretical Contributions

The objective of this research was to better understand how organizations can effectively open their strategy process in a manner that positively influences their social impact. Prior research on open strategy, social impact and stakeholder theory were drawn

upon to form this study, and the study's findings contribute to these same theories and fields.

5.1.1 Open Strategy Literature

This research makes a valuable contribution to several gaps in the field of open strategy. The literature review revealed a notable scarcity of research on open strategy within the context of nonprofit organizations. These organizations depend on a variety of stakeholders to support their existence and achieve the social impact they strive for. Engaging stakeholders effectively is crucial to the success of nonprofit organizations (Balser & McClusky, 2005). By focusing on a nonprofit organization, this study illuminates that open strategy can be practiced and yield benefits in organizations primarily seeking to make a positive social impact.

In addition, this research explored open strategy within a context where external stakeholders made up a majority of the participants involved. The effects of involving external participants in open strategy processes are understudied due to the reality that many organizations practicing open strategy limit inclusion to internal stakeholders (Hautz et al., 2019). Results of this study identified specific ways in which the mix of internal and external stakeholders contributed to more creative ideas generated, and how the involvement of external stakeholders led to improvements in their understanding of and commitment to the focal organization.

By utilizing action research methods, the findings of this research offer a comprehensive overview of the process of open strategy adoption – from the initial steps of defining roles, decision-making guidelines, and objectives, to the methods used to design and facilitate the open strategy process itself. A notable gap was observed in the

existing research as to understanding when and how to employ digital and analog approaches in open strategy (Hautz et al., 2019). By adopting a blend of digital and analog practices, the results of this study provide insights into their respective benefits: digital practices were advantageous for increasing participation and generating novel ideas, but less effective in fostering stakeholder commitment. In contrast, analog practices benefited the generation of novel ideas, relationship-building and greater stakeholder commitment. The detailed account of the process of adopting open strategy also contributed to addressing research gaps regarding how organizations can overcome practical dilemmas such as generating truly novel ideas, framing strategic issues clearly and diminishing power asymmetries between participants (Hautz et al., 2017; Seidl et al., 2019). The study included a detailed account of an idea generation workshop, contributing to the integration of open strategy and creativity literature. By applying research on conditions that foster creativity to the design of idea generation practices, the findings of the present study pinpoint specific methods that enhance novelty in the context of open strategy.

Finally, the present research provided insights into the effects of opening the strategic process on organizational outcomes. Despite some encouraging early findings, research on the effectiveness and outcomes of open strategy remains in its early stages (Hautz et al., 2017). Initial studies have suggested that open strategy can enhance the novelty of ideas, increase stakeholder commitment, and ultimately contribute to the successful implementation of strategies (Seidl et al., 2019). The results of this study showed that opening the strategy process fulfilled the promise of generating ideas that challenge strategic conservatism (Seidl et al., 2019). Through observations and

interviews, key factors contributing to the novelty of ideas generated were identified, particularly the fostering of creative conditions and the reduction of power asymmetry, which allowed stakeholders to generate and share valuable and novel insights. Moreover, the results of this research reveal additional outcomes from opening the strategy process that support leadership confidence in the realization of those strategies. Specifically, it was found that opening the strategy process enhanced stakeholders' understanding of the organization's strategic priorities, bolstered their commitment to the organization, and facilitated interorganizational collaboration. The results of the study also detail specific practices that contributed to these outcomes, thereby providing a crucial link between research on open strategy practices and their resulting impacts.

In summary, the results of this research offer valuable theoretical insights into both the process and outcomes of open strategy, responding to the call for research on how organizations can effectively open their strategy process to incorporate both internal and external stakeholders and, ultimately, enhance their social impact.

5.1.2 Social Impact Literature

Along with the contribution to open strategy literature, this research also contributed insights into the field of social impact, particularly the role of multi-stakeholder partnerships in addressing social issues. Existing research shows that collaborations across organizational boundaries are increasingly used to address social issues in order to share resources and knowledge, and build stakeholder commitment toward the mission at hand (Dentoni et al., 2018; MacDonald et al., 2019; Selsky & Parker, 2005; Tihanyi et al., 2014). Unlike a majority of studies in the open strategy field, this study focused within the nonprofit context and explored a process whereby a

majority of stakeholder participants were organizational partners, as opposed to internal employees. The findings provide insights into the practice of cross-sector partnerships and how knowledge-sharing and relationship-building can be fostered in an open strategy process.

5.1.3 Stakeholder Theory

A key contribution of this study lies in the detailed account of the stakeholder identification process used to prioritize stakeholders that was based on the application of stakeholder theory. One of the important questions in the study and practice of open strategy is who to include in the open strategy process (Hautz et al., 2019). There are many existing theories regarding how organizations make determinations as to which stakeholder claims are more salient than others. Mitchell et al. (1997) suggest that stakeholder salience is determined by their power, legitimacy and the urgency of their claims. This model has since been disputed as incomplete and oversimplistic (Wood et al., 2021). Comparing espoused theories such as these, with theories in use, is one of the contributions that action research is well-suited for (Argyris & Schon, 1974). In the findings, I offer an account of the theories in use through an illustration of the process of narrowing down stakeholders from broader groups to specific individuals. Furthermore, I detailed the specific variables employed to prioritize stakeholders and discussed the implications of these variables on the outcomes of the process. This research found that power and legitimacy were both important factors in determining stakeholder salience, however, urgency was not. In addition, there were two distinct forms of legitimacy that emerged as important – institutional legitimacy and constituent legitimacy. Three other stakeholder variables were utilized to determine stakeholder salience outside of Mitchell

et al.'s (1997) model, namely, congruence with organizational priorities, social identity and openness to experience of individuals. These findings contribute to stakeholder theory by illuminating how organizations in an open strategy process can use stakeholder theory to identify who to include, and how to make such determinations.

Practical Implications

Due to the practical nature of action research, the findings of this study provide valuable insights for organizations and strategy consultants aiming to incorporate open strategy into their settings. The practical contributions of the findings are particularly pertinent to those aiming to make a positive social impact. Action research gains validity through ensuring that its findings can be applied across similar contexts. The results of the present study provide a comprehensive account of the steps taken throughout each stage of the planning and action process, making it a valuable resource. Given the successful outcomes of this study in realizing the intended results of open strategy, organizations with similar goals can adapt the artifacts and lessons learned from within each phase within their own contexts.

During Phase 0, the action research planning phase, I detail the steps taken, including establishing roles, creating decision-making guidelines, and defining the objectives of the open strategy process. Practitioners can utilize these steps and the specific practices within them. For instance, practitioners might consider forming an SPT, using roles similar to those established in this project, as this approach was identified as a key factor contributing to the project's success. The decision making matrix, another crucial artifact, can be utilized by practitioners to set clear expectations around inclusion before beginning their open strategy process. This helped mitigate the risk of

stakeholders perceiving the process as open-washing, an important dilemma that practitioners must overcome to achieve a more successful adoption of open strategy.

Practitioners can also benefit from the methods and artifacts used during the planning stage of Phase 1, the idea generation phase, to define and frame strategic issues, identify and prioritize stakeholders, and design digital and analog processes for idea generation. The approaches that I utilized were solidly based on existing research from related fields, and the results of this study offer rationale for the decisions made throughout the idea generation process, providing valuable insights for practitioners seeking to adopt open strategy in both for-profit and non-profit contexts to draw upon. In this stage, I detail my approach to helping the SPT frame their strategic issues in a way that would elicit meaningful input from stakeholders. The detailed account of the process we undertook can provide significant value to other practitioners seeking to overcome the challenge of differentiating between strategic and operational issues, and of striking a delicate balance between providing specific enough information to prompt actionable solutions without limiting stakeholder's creative thinking. Also, during the plan stage, I provide insights into the process of identifying stakeholders utilizing a stakeholder map and then revealing the specific variables utilized to determine stakeholder salience for inclusion in the open strategy process. Practitioners can utilize the stakeholder mapping process and identification variables to identify stakeholders to involve in the open strategy process. The final step in the planning stage was to design the idea generation process. Important insights from the creativity literature can be utilized by practitioners in order to increase the likelihood that the open strategy process successfully contributes to more novel strategic ideas. In addition, specific design decisions that we made in both the

digital and analog context can be applied in other contexts. The workshop structure that we utilized (shown in Figure 8), the accompanying agenda (see Appendix F), and specific practices embedded in the agenda are important artifacts that can be applied to other open strategy idea generation processes.

The detailed description provided of the act stage of the idea generation process also provides utility to practitioners seeking to open their strategy process. The specific ground rules utilized to encourage diverse perspectives can be used in order to minimize power asymmetries between participants. In addition, the specific account of the practices such as the meditation, 25/10 crowdsourcing activity, and idea formulation activity can be leveraged in other practical contexts.

From the insights gathered during the observe stage of the idea generation process, practitioners can utilize the data structure (see Figure 11) that shows how the first-order concepts (e.g. natural setting), led to outcomes (e.g. fostering creativity), and the aggregate dimensions (e.g. novel strategy identification). This data structure supplies practitioners seeking similar outcomes from opening their strategy process with a list of practices and considerations from the first-order concepts that were found to positively impact the beneficial outcomes of open strategy. Practitioners in the nonprofit sector in particular can use these findings on the benefits of open strategy for organizational outcomes to confidently embrace open strategy, recognizing that its potential benefits may be applicable not only in for-profit contexts but also in the pursuit of social impact goals.

Lastly, additional insights were provided during the reflect stage of the idea generation phase that practitioners can utilize when adopting open strategy in their own

contexts. The consideration of not only who is included in the open strategy process, but also who is involved in the design and leadership of the open strategy process itself has important implications for practitioners. In addition, the choice of a consultant with both domain and process knowledge has practical implications for other practitioners. Given the additional resources and time that adopting open strategy requires of organizations, having adequate and knowledgeable support was found to be paramount to the success of the process. Lastly, the consideration of open strategy processes as an experience, as opposed to a means to an end to obtain ideas from stakeholders, has significant implications to how practitioners should design open strategy processes. In order to achieve important, yet intangible, outcomes such stakeholder commitment, attention to what participants feel throughout the open strategy process is essential to consider when designing the process.

Though this study was focused on one specific organization, the artifacts and best practices shared across each phase and stage of the open strategy process are applicable to other organizations both within and beyond the non-profit context. This research offers tangible practices to help minimize some of the known dilemmas of opening a strategy process while increasing the potential for the beneficial outcomes associated with open strategy. Organizational leaders and consultants alike can utilize and adapt these artifacts and lessons learned within their own contexts thereby increasing the likelihood of a more efficient planning process and successful outcomes.

Limitations and Future Research Directions

An action research methodology was employed in this study, focusing on the idea generation phase of the open strategy process. Like all research methodologies, action

research has inherent limitations that must be acknowledged. This methodology prioritizes the collection of rich, context-specific data, which cannot be captured through quantitative methods aimed at identifying more generalizable phenomena. While the results of this research offer insights that may be applicable to other situations that readers may encounter, action research is not inherently designed to produce findings that are broadly applicable across diverse contexts (Herr & Anderson, 2014). Consequently, the results of this study should not be used to make sweeping claims about the overall benefits of open strategy for organizational outcomes. Additionally, it cannot be presumed that the practices used in this specific context will automatically be effective if applied in different settings.

Furthermore, action research is intrinsically subjective. In this methodology, bias and subjectivity are acknowledged as inherent components and are deemed acceptable, provided the researcher actively engages in a critical examination of these biases throughout the study. In the present study, I employed various techniques to critically assess my biases. These included journaling, triangulating data from multiple sources, and regularly checking interpretations with the SPT and stakeholder participants throughout the process (Herr & Anderson, 2014).

In addition to the inherent limitations of action research, another limitation of this study is its capacity to assert the impact of open strategy on the successful formulation and implementation of strategies. The scope of this research was centered on the idea generation phase of the open strategy process, owing to time constraints within the research process and the focal organization's preference for “closing” the strategy process after the idea generation phase, a common practice amongst organizations (Hautz et al.

2019). While the results of the research did identify increases in stakeholder understanding and support for the strategy following the idea generation phase, the extent to which this translates into effective strategic implementation is yet to be determined.

Given the scarcity of action research in the open strategy field, there is an opportunity for future research to focus on the strategy formulation and strategy implementation phases of the open strategy process. Future research could involve a longitudinal study on organizations that choose to open their strategy formulation and implementation phases. Such a study would aim to determine if and how the novelty of stakeholder ideas and stakeholder commitment carries through these subsequent phases.

An intriguing observation from the findings of this research is the potential impact of stakeholders' experiences on affective outcomes. Participants frequently noted the "fun" aspect of the process. While I was unable to ascertain if and how this enjoyment influenced key outcomes, like an identification with and commitment to the focal organization, this aspect merits further investigation.

In addition, the consideration of the physical setting of the open strategy process and incorporating the outdoors seemed to have a positive impact. Further understanding of the environmental impact of open strategy on its outcomes would be worth exploring in future research.

Finally, the concept of procedural openness in open strategy deserves more in-depth exploration. The SPT's belief that their representation of different stakeholder groups facilitated a stronger adoption of open strategy and improved outcomes suggests a promising area for further research. Studies focusing on the practices of managing the

open strategy process and their impacts on the overall implementation of the open strategy process could yield insightful results.

Conclusions

The primary goal of this research was to better understand how organizations could engage multiple stakeholders in the idea generation phase of an open strategy process to enhance their social impact utilizing an action research approach. The findings of this research contribute to developing theory related to open strategy and stakeholders and the fields of social impact and sustainability. The findings also provide leaders in organizations who are seeking to apply open strategy into their setting with practical insights to improve their likelihood of success. More specifically, organizations who are seeking to make a positive social impact will likely find these results especially relevant. Lastly, the findings of this research contribute to positive changes for Trees for All and their mission of planting more trees for the benefit of a healthy planet and all those who live on it.

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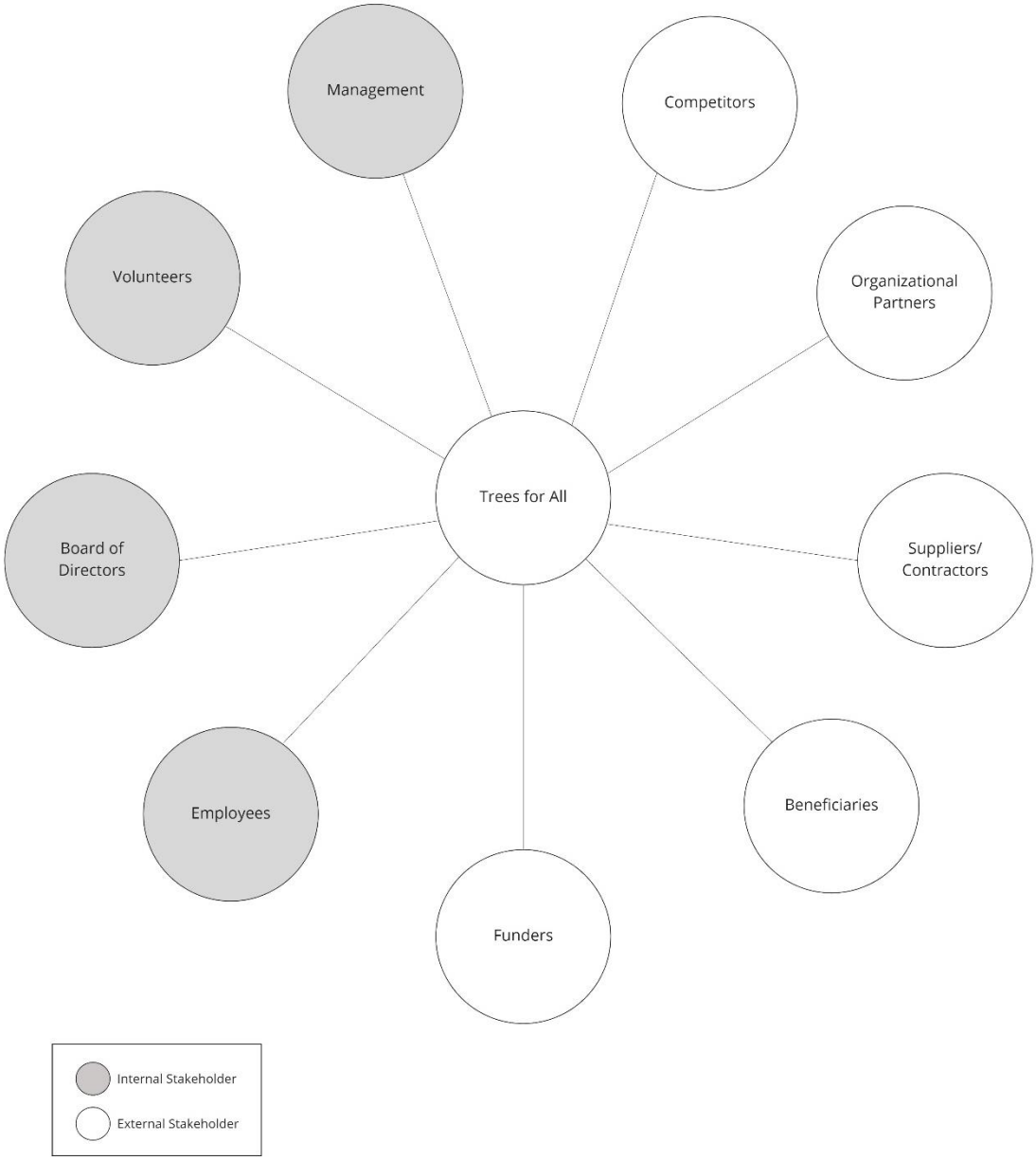
Appendix A

Stakeholder Map



Appendix B

Workshop Reflection Feedback Form

1. Name:
2. What were some key takeaways from the day for you?
3. What, if any, actions might you/your organization explore taking as a result of participating in this workshop?
4. How do you feel this process has impacted your personal/organization's relationship with Trees For All?
5. What additional ideas/questions do you have related to Forest ReLeaf that did not get captured today?
6. Would you be willing to participate in a 30 minute Zoom interview with Jo Pang about your experience with this open strategy process to support his research endeavor? Circle one: Yes/No/Other:

Appendix C

Stakeholder Interview Guide

1. How are you involved with Trees for All?
2. Why did you choose to participate in the open strategy process?
3. How did you feel about being invited to participate in the open strategy process?
4. What was it like for you to participate in the open strategy process?
    a. What did you like about the open strategy process?
    b. What did you find challenging about the open strategy process?
5. How did participating in the process impact your perception of Trees for All?
6. How did participating in the process impact how you will engage with Trees for All in the future?
7. Did participating in the process impact you in any other ways?

Appendix D

Strategic Issue Checklist

Though an issue does not need to meet all of these criteria to be strategic, the more criteria it meets, the more likely it is to be a strategic issue rather than an operational issue.

1. Issue would/should be on the agenda of a leadership meeting
2. Will impact the entire organization
3. Has significant financial impact (> 15% + of budget)
4. Best way to approach it is not obvious
5. Major long-term implications of not addressing it
6. Highly "charged" relative to existing community, social, political, religious, or cultural values
7. Taking action on the issue will result in changes in:
    a. Mission
    b. Organizational design
    c. Development of or elimination of existing programs/goals
    d. Funding sources/amounts
    e. Major facility additions/modifications
    f. Significant staff changes/additions
    g. Stakeholder relations
    h. Technology
    i. New learning/skills

Appendix E

Strategic Issue Framing

Strategic Issue #1

How can Trees for All most effectively contribute to growing tree canopy in low-canopy under-resourced areas of Missouri?

Background

Our vision is a more resilient tree canopy in Missouri that supports healthy people and a healthy planet. Some areas of Missouri are closer to this vision than others. Through social, climate and tree canopy data compiled at both the local and national levels, we are able to identify areas that are suffering with conditions such as higher urban heat and asthma rates. The data shows us that areas with higher incomes are correlated with higher tree canopies, healthier habitats, and better human health. Areas with lower than average incomes are correlated with lower tree canopies, poorer habitats, and poorer human health. Likewise, these lower tree canopy communities bear the brunt of the growing climate threats of extreme heat, air pollution, and flooding, among others, which continue to degrade the environment and the lives of the people who live in them.

Trees for All has been increasingly identifying and working to make impacts in areas with the lowest tree canopy within the St. Louis region. The last few years have brought a confluence of improved data sources, increased funding opportunities, and a broader societal focus on issues at the intersection of social and ecological health working in our favor. Many of our key organizational partners, funders, volunteers, board members, and more are offering their support to make a difference at this intersection.

This means that now, more than ever before, we are positioned to truly advance our mission of a more resilient tree canopy in Missouri where what we do is needed most.

However, sometimes the communities are not ready to receive new trees. What are the consequences of not addressing this issue? What makes it a priority?

- Areas with low tree canopy suffer the greatest effects from climate change.
- Lack of tree canopy has correlated negative effects on public health outcomes.
- A greener city benefits everyone.
- We more fully realize our mission.
- We gain more stakeholder support.

This is where you come in.

Issues at this level of complexity are not easy to resolve. Purposefully targeting areas that need trees the most is inherently challenging. It requires the cultivation of trust, knowledge, and interest in these targeted areas and the investment of resources and capabilities sometimes beyond those of our current staff.

So, how can Trees for All most effectively contribute to growing tree canopy in low-canopy under-resourced areas of Missouri?

Strategic Issue #2:

How can Trees for All positively influence the survival rate of the trees that we grow and/or plant?

Background

To promote resilient tree canopy in Missouri, trees not only need to be grown and planted, but also survive against a variety of threats that they will face throughout their

life. Our focus at Trees for All has historically been first and foremost on growing trees, though in recent years, we have also grown our capacity and volunteer base around planting trees. Unfortunately, our growing and planting efforts are futile if the trees do not survive until maturity where their intended benefits are realized.

We recognize the limiting factors that prevent trees from becoming mature canopy. These include:

- improper installation (too deep, volcano mulching, etc.)
- challenging site conditions
- drought/lack of watering
- vandalism/neglect
- mower damage
- wildlife damage
- insect/disease

As climate change increases the need for more trees in more vulnerable areas, we want to still be able to ensure a high survivability rate. There is so much work that goes into growing these trees that we want our investment to deliver. How do we adapt our programming, support our partners, and build a model that delivers long-lived trees?

What are the consequences of not addressing this issue? What makes it a priority?

- Lost resources and time when trees die
- Discouraged planting partners and waning interest to try again
- Fewer active tree stewards to combat a growing climate crisis
- If the tree never matures the intended impact never materializes.
- Potential tree canopy diminishes

This is where you come in.

What things should we be considering as we grow more trees in more places? How can Trees for All positively influence the survival rate of the trees that we grow and/or plant?

Appendix F

Idea Generation Workshop Agenda

Activity	Steps	Lead	Time (PM)
Introduction	Settling/Getting Lunch		12 - 12:15
	Welcoming	Exec Dir	12:15 - 12:20
	Introductions	Facilitator	12:20 - 12:45
	Process Overview & Norms	Facilitator	12:45 - 12:50
	Issue Framing	SPT	12:50 - 1
Transition Outside			1 - 1:15
Meditation	Standing Meditation	Facilitator	1:15 - 1:20
	Walking Meditation	Facilitator	1:20 – 1:25
25 - 10 Crowdsourcing (Strategic Issue #1)	Recap of Strategic Issue #1	SPT	1:25 - 1:30
	Brainwriting	Facilitator	1:30 - 1:40
	Mill and Pass	Facilitator	1:40 - 2
25 - 10 Crowdsourcing (Strategic Issue #2)	Recap of Strategic Issue #2	SPT	2 - 2:05
	Brainwriting	Facilitator	2:05 - 2:15
	Mill and Pass	Facilitator	2:15 - 2:35
Transition Inside			2:35 - 2:45
Idea Formulation Activity	Break-Out Instructions	Facilitator	2:45 - 2:55
	Break-Out Rooms Round 1	Facilitator	2:55 - 3:20
	Break-Out Rooms Round 2	Facilitator	3:20 - 3:45
	Break-Out Rooms Round 3	Facilitator	3:45 - 4:05
Closing	Self-Reflection & Feedback Form	Facilitator	4:05 - 4:15
	Sharing Takeaways	Facilitator	4:15 - 4:30