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## **The Role of Meetings in the Social Practice of Strategy<sup>1</sup>**

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### **ABSTRACT**

This paper addresses the recent turn in strategy research to practice-based theorizing. Based on a data set of 51 meeting observations, the paper examines how strategy meetings are involved in either stabilizing existing strategic orientations or proposing variations that cumulatively generate change in strategic orientations. Eleven significant structuring characteristics of strategy meetings are identified and examined with regard to their potential for stabilizing or destabilizing existing strategic orientations. Based on a taxonomy of meeting structures, we explain three typical evolutionary paths through which variations emerge, are maintained and developed, and are selected or de-selected. The findings make four main contributions. First, they contribute to the literature on strategy-as-practice by explaining how the practice of meetings is related to consequential strategic outcomes. Second, they contribute to the literature on organizational becoming by demonstrating the role of meetings in shaping stability and change. Third, they extend and elaborate the concept of meetings as strategic episodes. Fourth, they contribute to the literature on garbage can models of strategy-making.

**Keywords:** Strategy-as-practice, strategy meetings, university, strategy episodes, strategizing.

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### **The Role of Meetings in the Social Practice of Strategy**

With its recent turn towards practice-based theorizing (Balogun et al. 2007; Hendry 2000; Jarzabkowski 2005; Johnson et al. 2003; 2007; Whittington 1996; 2003; 2006) strategy research has developed a particular interest in the everyday activities of strategy practitioners. Strategy, it is argued, may be understood as something people *do* rather than something that firms-in-their markets *have*. While Johnson et al. (2003) proposed a focus on the everyday micro-activities through which actors shape strategic outcomes, others emphasize that these micro-phenomena need to be understood within their social context. Actors do not act in isolation but draw upon regular, socially defined modes of acting that make their actions and interactions meaningful to others (Balogun et al. 2007; Chia and Mackay 2007; Suchman 1986; Wilson and Jarzabkowski 2004; Whittington 2006). We must thus look to those social structures, such as tools, technologies and discourses, through which micro actions are constructed and which, in turn, construct the possibilities for action (Giddens 1984; Orlikowski 1996). Strategy-as-practice has, therefore, been conceptualized “as a situated, socially accomplished activity, while strategizing comprises those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity” (Jarzabkowski et al. 2007: 7-8)

One recommendation for analysing strategy as a situated, socially accomplished activity, is to focus on those activities that draw upon and are structured by particular strategic practices. Strategy is connected with particular types of practices, such as strategic planning, annual reviews, strategy workshops and budget cycles that are often overlooked as the mundane practices of strategy; a means to an end, which, as Whittington (1996; 2003) points out, neglects the way that these routine, institutionalized and often taken-for-granted practices socially structure strategic outcomes. More recently, research has shown how a study of micro routines and practices can illuminate the way that strategists act and interact and the strategic outcomes that they produce. For example, Sturdy et al (2006) illustrate how the routinized social structures underpinning business dinners are consequential for the way senior consultants construct their business, while Jarzabkowski (2003; 2005) explains how the recurrent annual cycles of formal administrative procedures shape patterns of stability and change in strategic activity over time. Other authors examine strategy workshops as a widely diffused and largely consistent strategy practice across organizations (Hodgkinson et al. 2006), and yet point out that we know little about how such

practices shape strategic activity, such as the strategic change at which they are purportedly aimed (Johnson et al. 2005; Seidl et al. 2006). These authors propose that by better understanding its underpinning micro structures, we may better understand how strategic activity emerges.

This line of practice theorizing conceptualizes the mundane, micro practices through which strategy work is constructed as widely diffused resources that may be drawn upon to perform patterned sequences of strategic activity (Giddens 1984). However, despite their routinization, such practices are not immutable (Feldman 2000; Lounsbury 2001). They neither form rigid patterns nor are interconnected in the same ratios, types and combinations over time (Feldman and Pentland 2003). Rather, practices are diverse and variable, being combined and altered according to the uses to which they are put in constructing activity (Orlikowski 2000; Tsoukas and Chia 2002). Organization is framed as a continual process of becoming, in which practices reconstruct the organization on a recurrent basis but also provide the grounds for its modification (Jarzabkowski 2004; Orlikowski 1996; Tsoukas and Chia 2002; Weick 1979). Strategy practices are thus associated both with stabilizing patterns of activity because they represent widely accepted, socially-defined ways of acting and at the same time are micro-mechanisms of strategic change according to the way they are used (Tsoukas and Chia 2002; Whittington 2006). This paper takes this approach, examining strategy meetings as typically occurring social practices that have implications for stabilizing or destabilizing the flow of strategy activity within organizations.

Despite their pervasiveness, we know little about the effects of meetings upon the organizations in which they take place. This is surprising in the strategy field, as meetings are conspicuous events in the strategy process. They are scheduled routinely; for example in the annual strategic planning cycle. However, they are also turned to during critical strategic incidents; for example, calling a meeting whenever an important strategic issue arises. Meetings can thus be understood as focal points for the strategic activities of organisational members, inherently associated with stabilizing strategy into recurrent patterns but also with its evolution during times of crisis or change. Based on a data set of 51 strategy meeting observations in three universities, this paper examines how meetings are involved in either stabilizing and reconfirming existing strategic orientations or proposing variations that cumulatively generate changes in those orientations. As this is a relatively under-explored topic, the paper addresses the following

exploratory research question (Eisenhardt 1989; Langley 1999): *How do strategy meetings contribute to stabilizing or destabilizing of strategic orientations?*

The paper is in four sections. First, we present the literature on meetings, linking this to Hendry and Seidl's (2003) concept of strategic episodes as an apposite framework for guiding empirical studies on meetings and locating our study within the literature on strategy-making in university contexts. Second, the empirical research design and analytic process is explained. Third, we present the empirical findings in two sections: (1) Showing how meeting structures shape the strategic interactions taking place within them and (2) explaining how these structures link over a series of meetings, constructing a micro-evolutionary path through which strategic orientations may be either stabilized or destabilized. Finally, we discuss the results and their contributions to strategy as practice and to strategy-making in universities.

## **THEORETICAL BACKGROUND**

### *Research on meetings*

In the classical organization-studies literature meetings are typically perceived uncritically as tools for accomplishing specific tasks, such as decisions (e.g. Simon 1997); albeit not a very effective tool. In contrast to this instrumental view, recent studies have drawn attention to the role of meetings as routinized social practices that serve to stabilize the wider social system of which they are part (Peck et al 2004). Much of this research comes from political studies, analysing the role of meetings in the public policy-making process. Meetings are important for setting agendas (Adams 2004; Tepper 2004), building commitment (Terry 2001) and providing information to policy makers (Adams 2004) rather than for generating policy decisions as such. Other anthropological and sociological research focuses upon variations in the form and function of meetings in different societies (e.g. Bailey 1965; Howe 1986; Myers 1986). Yet another stream of research frames meetings ethnomethodologically as discursive constructs. These authors study the micro-techniques used in constituting a meeting as a specific social setting (Atkinson et al. 1978; Boden 1994; 1995; Schwartzman 1989), such as turn-taking in speaking, reference to an agenda, and markings of beginning and ending. Building on these studies, a nascent systems-theoretical literature analyses the specific mechanisms through which meetings reproduce themselves as self-referential, autopoietic systems (Kieserling 1999; Seidl 2005a; 2005b).

These various strands of literature provide some schemas which can be used to define meetings. Meetings are planned gatherings of three or more people who assemble for a purpose that is ostensibly related to some aspect of organizational or group function (Boden 1994; 1995; Schwartzman 1989). Meetings are thus distinct from casual encounters; they have an organizational purpose, involve multi-party talk and are considered episodic because they bracket in some actors and issues during a particular space and time, whilst bracketing out others (Boden 1994; Schwartzman 1989). In this definition, all meetings are formal, to the extent that they are planned gatherings for a purpose. However, within this classification, meetings may have more or less formality in their approach to the meeting structure and its tasks (Boden 1994; Kieserling 1999; Schwartzman 1989; Seidl 2005a). In particular, differences in formality may lie in the planning and management of meetings, such as the role of agendas and chairing (Bostrom 1989; Kieffer 1988; Monge et al. 1989; Volkema and Niederman 1996).

The literature also indicates that meetings serve a role within wider organizational activities; for example as a forum for coordinating different organisational perspectives and agendas (Boden 1995). As such, meetings help to sustain the unity of the organization by 'socially validating' the current order or by serving as a place for participants' sensemaking (Schwartzman 1989; Weick 1995). Commensurate with this approach, meetings are posited to be part of an ongoing flow of organizational activities, as meetings tend to give rise to subsequent meetings (Schwartzman 1989). Thus, the *interrelation* between meetings is posed as a valid topic for study. For example, "across numerous meetings, which themselves form sequential structures of interaction, organizational goals and agendas are surfaced, submerged and, occasionally, agreed and advanced." (Boden 1995: 90) Similarly, Peck et al. (2004) noted that particular suggestions may be withdrawn at meetings, only to resurface at later meetings, while Tepper (2004) observed that meetings may be used to keep specific topics alive within the organization until an opportunity for decision arises. Yet, none of these studies has analysed the relationship between meetings in detail, tracing how issues pass through a series of successive meetings, how meeting characteristics enable issues to be raised, maintained or resurfaced, and what implications this has for maintaining or changing the organizational structures and goals. Our paper addresses this gap, examining the characteristics of strategy meetings, the forms that they take, their sequential relationships and the implications of these characteristics, forms and sequences for shaping strategy.

*A framework for studying meetings*

Within the strategy-as-practice literature Hendry and Seidl (2003) developed the concept of strategic episodes as an apposite framework for studying meetings. Drawing on Luhmann (1990; 1995), they define episodes as sequences of events marked by a beginning and a pre-defined ending. While any process has a beginning and an end, the point of the episode is that beginning and ending serve as an orientation to the activities taking place in between. That is, the activities of an episode are teleological in the sense that they take into account the pre-determined ending of the episode. For example, the ending of an episode might be pre-defined in terms of a deadline or a particular task that has to be accomplished. Beginning and ending are two points of temporary structural change: at the beginning of the episode some of the existing organizational structures are temporarily suspended and replaced by new meeting structures only to be replaced at the end by the original structures. Thus, as Hendry and Seidl (2003: 183) assert: "The basic function of episodes is simply to make it possible to suspend and replace structures for a certain time period".

Episodes have three critical aspects: initiation, termination and conduct. *Initiation* is the point at which the episode gets 'de-coupled' from the ongoing organizational processes. In addition to suspending established structures, initiation is also the point at which new structures for the activities within the episode are established. Similarly Boden (1994) speaks about the initiation of the meeting as the point at which some actors and issues are bracketed in while others are bracketed out. *Conduct*, deals with activities within the episode. Analyzing meeting conduct involves examining particular procedures, such as the mode of turn-taking (Boden 1994; Schwartzman, 1989). *Termination* of the meeting is the point at which the organizational structures are reinstated and the particular meeting structures are dissolved. The bracketing process is completed and members disperse back to their daily activities (Boden 1994). The closure is also the point at which the episode is 're-coupled' to the outside processes. If the meeting is to have an effect on the wider organization, any decisions taken or changes proposed during the meeting must be incorporated into the organization. The ending, however, may also protect the organization from potentially disruptive effects occurring within the episode by filtering what is admitted out of the meeting into the wider organisational processes (Hendry and Seidl 2003).

Hendry and Seidl conceptualize strategic episodes within the context of strategic stability and change. They argue that strategic episodes constitute the basis of a micro-evolutionary

variation and selection process. This ties in with a more general turn in management studies (e.g. Weick 1979; Nelson & Winter 1982; Burgelman 1991), and strategy-as-practice research in particular (e.g. Salvato 2003), to explain change in terms of evolutionary mechanisms. Hendry and Seidl (see also Seidl 2005b) argue that episodes, by nature of being apart from the wider ongoing organizational activity, allow organisational members to step out of their daily routines, to reflect on them and based on that, to propose variations to the existing strategic orientations. However, not only strategic change but also its stabilization is actively created within such episodes (see also Wilson and Jarzabkowski, 2004).

"Strategic episodes are the mechanism by which [incremental changes in the organisation's structure resulting from random perturbations] are reflexively monitored, not just to identify situations where the existing strategy may no longer be appropriate ... but also to realign the organization, where appropriate, with the existing strategy. A strategic episode that results in a positive confirmation is just as important for the organizational well-being as one that results in change." (Hendry & Seidl 2003: 188)

Yet, even where strategic orientations are either confirmed or changed *within* the episode, this also needs to be fed into the wider organisation. The effect of a meeting therefore depends on the receptiveness that its outcomes meet within the wider organization (see also Hodgkinson et al. 2006). In other words, the 'proposals' for strategic change (variation) might be *selected* into the wider organization, depending on the receptivity of the organisation and the way that the variation is introduced into its existing structures.

In our empirical study of strategy meetings we draw on Hendry & Seidl's concept of strategic episodes as a framework to guide our analysis. Accordingly we attend particularly to the initiation, conduct and termination of the meeting as its three critical aspects. We follow their suggestion to frame the analysis in terms of a micro-evolutionary process. However, in contrast to Hendry & Seidl's *theoretical* argument we want to remain conceptually open about how to attribute the different evolutionary functions of variation and selection.

#### *Constructing strategic orientations in the university context*

This paper is based on a study of 51 strategy meetings within three universities. As organizations with a professional workforce, universities have particular characteristics that must be taken into account in examining how formal strategy meetings contribute to stabilizing or

destabilizing of strategic orientations. Universities are prone to ambiguous and potentially divergent strategic orientations arising from the diverse professional interests, responsibilities and affiliations of their academic workforce (Cohen and March 1974; Hardy 1991; Jarzabkowski 2005; Jarzabkowski and Sillince 2007). Knowledge-based academic work is not easily organized by formalization of hierarchy and power structure (Mintzberg, 1979; Podsakoff et al. 1986). As such, universities are typically portrayed as organized anarchies (Cohen and March 1974) or loosely-coupled systems (Weick 1976), in which the social structures of the university couple to the interests of different professional groups with relatively low central management (Mintzberg 1979). Hence, strategy-making by management fiat cannot be assumed in university contexts.

Given these characteristics, it is hard to generate sufficient momentum for strategic change in universities because of the difficulties in aligning ambiguous goals and diffuse power structures around collective action (Cohen and March 1974; Denis et al. 2001; Jarzabkowski 2005). While the divergence in interests might generate the grounds for change from different interest groups, the loose organizational structures can defeat strategic decision-making or action. Thus, strategy-making in universities is typically portrayed as a garbage can, in which strategy emerges from the random confluence between problems, solutions, participants and choice opportunities (Cohen et al. 1972). In a garbage can model, choices may be made based on the solutions available and the allocation of attention by participants at a moment in time, so that solutions are not necessarily applied to problems that they can solve. Hence, there is a tendency to strategic inertia, as different interest groups in the university pursue their own goals in relative isolation, with little collective strategic action for the university as a whole (Cohen et al. 1972; Cohen and March 1974). Nonetheless, recent studies indicate that university-wide practices increasingly are evolving in response to institutionalized pressures for external accountability (Lounsbury 2001), which, strategically, involve collective responses to strategic issues of financial viability, teaching and research quality (Clark 1998; Shattock 2003; Slaughter and Leslie 1999).

These characteristics of universities are of specific relevance to our study in two main ways. First, because of diffuse power structures and professional autonomy, universities adopt ostensibly democratic forms of governance (Hardy 1991). Strategy meetings thus include members of the academic community in order to ensure that strategy-making is conducted in view of others (Cohen and March 1974; Jarzabkowski and Wilson 2002). We term these 'open' meetings because

they are not restricted to top managers, but have representatives from the academic community, such as professors, departmental or faculty heads, and, potentially, more junior members of staff. The open nature of such meetings serves collegial expectations about democratic governance (Simon 1997). While open meetings are a symbol of democratic participation in governance (Adams 2004; Weick 1995), they also provide a vehicle for top managers to shape strategy within political constraints and professional norms (Peck et al. 2004; Tepper 2004; Terry 1987). We therefore propose that universities provide a more nuanced context for the relationship between episode and organization than is implied in Hendry and Seidl's (2003) framework. Their paper refers to the tightly structured context of traditional for-profit companies, emphasising how episodes enable such organisations to *suspend* their structures, without giving much attention to the structuring of the episode itself. In our analysis of loosely-structured university contexts, the emphasis is necessarily less on the suspension of organisational structures than on the instantiation of new structures. Thus, examining how meetings instantiate social structures will be a critical point in the data analysis.

Second, strategic change is difficult to pursue within universities, due to the problems of aligning their multiple constituents around a common goal (Cohen and March 1974; Denis et al. 2001; Jarzabkowski 2005). Hence, it is likely that university processes and practices will tend to stabilize their existing strategic orientations, reinforcing the status quo. Identifying how potential variations in strategic orientations emerge within meetings and/or tracing how they evolve will, therefore, be a second critical point in the data analysis.

While universities are our specific research context, they share many characteristics with other public and professional organizations such as hospitals, cultural organizations, non-profit, government and policy-making bodies. These organizations are also characterized by diffuse power relationships, an autonomous professional workforce, low management fiat, and knowledge-based goods and services (Denis et al. 2001; Hinings and Leblebici 2003; Lowendahl 1997). The findings from this study might therefore be expected to have wider relevance in other public- and third-sector organizations.

## **RESEARCH DESIGN**

A longitudinal study of three UK universities was conducted over a seven-year period, of which six years were retrospective, while the final year, pertaining to this study of formal

meetings, was real-time. Drawing upon existing typologies (O'Leary 1997), cases were selected from three types in order to reflect the parameters of the UK university sector outside the ancient universities, which were excluded because of their atypical governance structures. Three cases that were within a realistic travel distance for rich qualitative data collection were selected on the basis that they met the typology criteria, offered equally high quality access to rich data, and were well ranked examples of their type, heightening process comparability (Pettigrew and Whipp 1991). Specific details of the three cases are disguised to preserve anonymity, being labelled Campus University, Urban University and Metropolitan University.

The unit of analysis in this paper is strategy meetings. The paper thus focuses upon the data set of 51 strategic level meetings that were observed over a one year period across the three sites. Meetings were identified as strategic through interviews with top managers and this identification was confirmed by examining the content of such meetings, both in real-time and retrospectively through their various minute books. These meetings were identified by the participants as strategic because they dealt with issues that were consequential for the organization as a whole, particularly in terms of their reputation and prestige, their growth, and their financial viability and survival, which are all important sources of competition in the university sector (Brewer et al. 2002; Gioia and Thomas 1996; Slaughter and Leslie 1999).

### **INSERT TABLE 1 ABOUT HERE**

Table 1 summarizes the meetings that were observed, which were selected because they occurred as part of the annual strategy process of each case, highlighting whether they were open (42), meaning wider membership than the top management team, or closed (9), meaning attended only by the top management team<sup>2</sup>. All meetings were observed by the first author, who had full access to all meeting agenda and minutes and was treated as a participant for the purposes of receiving all documentation in advance of meetings. Meetings were not tape-recorded because of the confidential nature of strategy topics (Laurilla 1997; Pettigrew 1992) and the potential for recording to constrain meeting interactions, which would have been counter to our data collection purposes (Maitlis 2005). Therefore, during the meetings, extensive notes were taken on every item discussed, including as many verbatim quotes as possible and also some notes on gestures,

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<sup>2</sup> While no closed strategy meetings were observed at Campus because of the nature of their governance structures, the first author did query the content, processes and outcomes of other top team meetings, particularly in relation to any strategies she was tracing throughout the study.

expressions and other body language that accompanied the meeting process. Additionally, the first author always arrived early for meetings and lingered afterwards, so that she could observe any pre- and post-meeting discussion and interactions. Pre-meeting observations enabled her to observe any articulated intentions to shape the forthcoming meeting, while post-meetings she was observed how participants discussed the meeting and its outcomes. Taking part in the interactions surrounding meetings provided opportunities to talk informally with participants about the meeting and clarify impressions. These observations were incorporated into the field notes, which were written up within 24 hours (Yin 1994). In addition to field notes, the first author used interviews and informal on-site interactions with research participants to query the content, processes and outcomes of meetings, including some meetings that she did not attend. With field notes, agenda and supporting documents, our meeting data was in excess of 1,000 typed A4 pages.

While the unit of analysis is strategy meetings, this study aims to explain how such meetings contribute to the stabilization or destabilization of strategic orientations. Stabilization and destabilization are conceptualized in terms of contribution to the development of variations to existing strategic orientations (destabilization) or suppression or constrained emergence of variations (stabilization). Therefore, a richly triangulated body of data is drawn upon to furnish information on strategy (Jick 1979). For example, we collected extensive documentary data, such as meeting minutes, strategic plans, memoranda and university calendars, complemented by 49 interviews with senior managers, comprising both retrospective questions about strategy as well as probing current issues. These data were used to develop rich chronological narratives of the strategies in which each university was engaged (Langley 1999). This enabled us to contextualize the role and impact of meetings within the strategy-making process. In particular, we could identify which points in meetings constituted stabilization of existing strategy and which might be considered as variations because we had a chronicle of the strategies being pursued over time (see Jarzabkowski 2003; 2005). While the variations might be quite micro, they had to constitute a modification that altered existing strategic orientations, rather than simply being a process change that might strengthen these orientations. Stabilisation thus refers to any item that confirms existing strategic orientations, while destabilisation refers to any variation proposed within a meeting that might, if adopted, constitute a modification to or evolution of existing strategic orientations.

*Analytic method*

In order to answer our research question on how formal meetings contribute to stabilizing or destabilizing strategic orientations, a thematic qualitative analysis, supported by Nud\*ist coding, was pursued over four cumulative phases (Strauss and Corbin 1998). First we analysed the parameters of the entire meeting data set, establishing that it comprised 306 agenda items across 51 meetings, with a range of 4 to 9 items and an average of 6 items/meeting. These descriptive parameters provided a basis to support qualitative analyses of meeting practices; for example examining how typical specific findings were in relation to the whole data set.

Second, we analysed those practices through which strategy meetings are socially accomplished. Drawing upon Hendry and Seidl's (2003) framework as a guideline, we separated meetings into the three aspects of initiation, conduct and termination. We then examined the practices established in each of these phases by examining how authority relationships and typical meeting activities were constituted, such as establishing jurisdiction over meeting activities through chairing or setting an agenda, confirming our data-grounded findings through reference to the literature (e.g. Boden 1994; Kieffer 1988; Monge et al. 1989; Schwartzman 1989). In *initiation*, we examined how the bracketing of issues and actors within a meeting conferred authority on top management participants over others. In *conduct* we studied how the meeting conversation developed around particular items, deriving four categories of turn-taking that we labelled free discussion, restricted free discussion, restricted discussion and administrative discussion. In *termination* we examined how items within the meeting were either resolved for reintroduction to the organization or how they were referred to other meetings, deriving two practices for referring items, working groups and rescheduling, and two practices for terminating items, voting and stage-managing. We then examined the identified practices against the descriptive parameters of the data set, establishing the frequency with which they occurred. These analyses are presented in the first column of Tables 2-4 in the results and are supported by examples and explanations of the nature and purpose of the meeting practices we found.

Third, we studied the implications of these practices for stabilizing or destabilizing existing strategic orientations in two ways. First we examined specific incidents that took place in each meeting, analyzing these incidents in relation to our chronological narratives of each university's strategic activities. This analysis enabled us to identify *proposed variations* to the existing strategic orientations of a university within any given meeting. Second, we analysed how the

meeting practices that we identified, such as particular forms of meeting conduct, were or were not associated with these proposals of variation, deriving a categorisation of meeting practices, according to whether they were primarily associated with either stabilization or destabilization of existing strategic orientations, which is reported in the second column of Tables 2-4. These practices of meeting initiation, conduct and termination and their implications for stabilizing or destabilizing strategy are presented in the first section of the results.

Finally, we traced the flow of proposed variations through the chronological sequence of meetings. Drawing upon the practices identified, we examined the links between meetings and the way that a proposed variation, in iterating through several meetings, evolved towards the stabilization or destabilization of existing strategic orientations. From this analysis, we derived a three-stage evolutionary path for proposed variations, that explained how particular meeting practices were associated with the *emergence* of proposals of variation, the capacity for these proposals to be *maintained and developed*, and the implications for *selection or de-selection*, when they were eventually re-coupled to the organization. This culminated in a taxonomic classification of meeting practices and the role that they play in enabling some variations to evolve to the point of destabilizing existing strategic orientations. This taxonomy is presented, with representative examples, in the second section of the results.

## **FIRST SECTION: CHARACTERISTICS OF STRATEGY MEETINGS**

This section describes and explains the characteristics of meeting initiation, conduct and termination according to their potential to stabilize or destabilize existing strategy.

### ***Initiation***

We found that the initiation of a strategy meeting has three key practices that establish meeting structure and authority; meeting location, setting the agenda and chairing the meeting.

### **INSERT TABLE 2 ABOUT HERE**

#### ***Bracketing participants in a central location***

The initiation of a formal strategy meeting gives participants a reason to gather from their disparate places within the organization. As shown in Table 2, strategy meetings typically were conducted in a central university location, requiring most participants to be physically remote from their departments in order to attend the meeting. As the following quotes illustrate, this physical

relocation has a symbolic role in suspending existing organizational structures by focusing participants on the meeting agenda and separating them from their departmental interests.

*"I'm happier to be on this site than at [central location]. ... being in the Department, going to have a coffee in the coffee room, being available at this site is quite useful actually. It keeps me in touch with what's going on. ... At the same time I have this University wide role and ... I think I'm beginning to step back more from the Department"* (Urban participant)

The symbolism of physical relocation in terms of focusing upon the university-agenda, is accompanied by the symbolic instantiation of authority; inferring authority over strategy to top managers who are located centrally. As participants expressed it:

*"We have no office in [central location]. ... I mean I wouldn't want to move from here. I'm quite happy staying here. I see the students. But the absence of an office means that we spend an enormous amount of time walking over to [central location] to see people and that already sets up a kind of almost hierarchical model. There is a physical relationship ... Simply because, you know, the [strategy] papers are over there"* (Campus participant)

*"I think though that not being in [central location] and just bumping into people is a disadvantage ... we are not milling about the place in the way that the others are milling about the place together"*. (Different Urban participant)

Top managers also drew symbolic authority from their central locations, associating it with their jurisdiction over strategy; *"We in [central location] are charged with responsibility for University strategy"* (Urban top manager). Thus, initiating a strategy meeting within a central location that is the domain of top managers rather than of other meeting participants establishes a subtle authority, privileging top managers.

### *Setting the agenda*

The meeting agenda is part of its initiation practices. While an agenda establishes the focus of the meeting, its formality differs in open and closed meetings. In the open meetings, agendas were formally prepared by a top team member and sent out some two weeks in advance, whereas in closed meetings the agenda was typically shorter and developed only a day or two before the meeting, or even at the meeting. While top managers set the agenda for open meetings, they cannot totally control it, as the agenda is developed at least partially from participants' input at the previous meeting. However, they are able to manage the order of the agenda, positioning items

according to their perceptions of whether those items might be more stabilizing or destabilizing. Agenda-driven control of the meeting was less evident in closed meetings for two reasons. First, the participants were typically from the inner top team circle and tended to use these meetings as a place for strategic discussion between top managers. Second, these closed meetings were never formal decision-making bodies for the university, as top managers needed to legitimate any issues from a closed meeting in more open meetings. Indeed, top managers often used closed meetings to prepare their responses to the agenda for open meetings. For example, in discussing a potentially destabilizing item for a meeting agenda at Metropolitan, top managers noted that; *“If the academics want to do that, we need to draw their attention to the implications of their decisions upon University resources”* (Metropolitan top manager). They prepared documentation for the meeting to support their own interests in stabilizing the particular strategic orientation. Setting the agenda thus accords authority to top managers, which may be used to support their own interests in stabilizing or destabilizing strategic orientations.

### *Chairing*

Authority is further accentuated by chairing the meeting. As shown in Table 2, in 47 meetings the Chair was a top team member, who could use his/her role to introduce the agenda and establish some authority over the meeting. Typically the Chair introduced non-contentious items early in the meeting, which gave time for participants to disengage from their departmental focus and interests and engage with the meeting structure and its strategic focus. For example, in opening a meeting on the resource allocation process, the VC at Metropolitan University launched into an oral report on agenda item 1, an item about an agreed capital expenditure that needed no decision. Those items that occasioned high discussion did not appear as the first or second agenda item, being delayed until the meeting was fully under way, which enabled the Chair to establish authority over the meeting conduct at the outset (see Table 3, administrative discussion). Thus initiation practices privilege the authority of top managers in terms of meeting location, setting the items and order of the agenda, and in Chairing the discussion.

These initiation practices of formal strategy meetings are neither stabilizing nor destabilizing in themselves. However, they accord a subtle symbolic authority over the meeting to top managers. As shown in the next sections, this authority, while not hegemonic, provides top managers with opportunities to advance their own interests in stabilizing or destabilizing existing

strategic orientations. This opportunity is particularly relevant in the university context, where managerial authority to shape strategy may not always be assumed.

### ***Conduct***

The Chair has authority over the meeting's conduct, particularly turn-taking in which participants must be acknowledged by the Chair in order to speak, unless the Chair specifically relaxes that authority. While the Chair cannot control the content of any individual participant's discussion, the role provides a set of structural and symbolic parameters around how that content may be presented. We now discuss four meeting discussion practices that we found, free discussion, restricted free discussion, restricted discussion and administrative discussion, and their implications for stabilizing or destabilizing existing strategy, which are summarized in Table 3.

### **INSERT TABLE 3 ABOUT HERE**

#### *Free discussion*

When an agenda was opened to free discussion, the Chair suspended authority over turn-taking, enabling participants to engage in spontaneous, unstructured comments and responses without seeking the acknowledgment of the Chair. There were 71 instances of free discussion, which had two implications for stabilizing or destabilizing existing strategic orientations: enabling the emergence and the development of variations (see Table 3).

Emergence of proposed variations: Because of its self-organizing character, free discussion allows participants to step out of existing discursive and cognitive structures and routines and experiment with tentative new ideas that may challenge the existing orientations. This is supported by the spontaneous atmosphere that free discussion tends to give rise to: people can put forward suggestions without having to take responsibility for them. The ability to react to each other without having to go through the Chair can provide the discussion with momentum, from which variations arise as a product of the interaction between individuals. The following example illustrates how, during a period of free discussion about raising research grant and contract income at Campus University, a proposal for a significant structural change to managing research activity emerged, which gave research a more commercial, rather than academic orientation.

During a university planning meeting, the participants were discussing the static research income figures for the 5-year forecast. The issue was opened to free discussion because the research figures had been a perplexing problem for a couple of years. As discussion progressed,

the group agreed that static targets were unacceptable. They needed to set tough goals. One member emphasized the importance of the University's commercial orientation: "*It's simply not good enough. We must set TOUGH surplus plans of an increase each year and we MUST achieve those targets which we have not been tough on in the past*". In the context of this discussion, the importance of increasing research income became apparent.

A second participant agreed, suggesting a way to increase organizational receptivity to more commercial forms of research by altering the current monitoring and control procedures for handling income generation: "*We need to have two committees, an academic side to handle and sort out academics and research contracts and an income side to handle the commercial and administrative side.*" The Vice-Chancellor liked the suggestion: "*Be tougher with academics to pull in more research income and get the commercial income up as well.*" In the ensuing discussion, the meeting coalesced around the increasingly commercial orientation for the research strategy and, particularly, the change in management structures. Referring to previous attempts to increase the organization's commercial research orientation, another participant pointed out; "*It's unlikely to be achieved by democratic means*". The first speaker agreed: "*It's got to be authorized or recommended from the top ... You want to keep the surplus increasing which is realistic to ask for.*" The previous speaker reinforced the shift in strategic orientation that they wanted to propose to the organization; "*It's not enough for research just to be good in itself. It has to have financial benefits as well.*" Another participant reminded them that the increasingly competitive funding environment meant that people were already working very hard to achieve the current figures. Increased financial output was a lot to expect but he agreed that they needed to try. Free discussion tapered off as the meeting accepted this proposed variation to research orientations, agreeing to develop it further in order to increase organizational receptivity to the change.

Free discussion in this meeting enabled the emergence of a variation in approach to the research strategy, which was to introduce significant change into the organization<sup>3</sup>. Prior to this meeting, research income had been considered largely as an academic activity aligned to research prestige, whereas now it was being positioned as a commercial activity, with associated commercial monitoring and control structures.

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<sup>3</sup> The first author had been observing this organization for nearly a year without any hint of such a change. Afterwards, in discussion with participants, she confirmed her impression that the proposal had emerged through the meeting discussion, rather than being previously planned.

Development of proposed variations. When a proposed variation, such as the above has emerged, it still requires further development to align with wider organizational structures and interests. In our data, free discussion was mostly associated with such development (see Table 3), enabling members to discuss proposed variations from various angles without restrictions. The spontaneous interaction associated with free discussion encouraged participants to voice even tentative ideas about the proposed variation. Members could also elaborate on various points involved in legitimating the variation to the wider organization, as this example at Metropolitan University illustrates. A meeting of the Resource Planning Committee discussed the potential to centrally control a number of quite profitable journals that were owned by departments. Currently that revenue was not utilized at a university level and, often, because the journal editors did not have a commercial orientation, was simply accumulating without being used. Top managers were endeavouring to shift the university towards a more commercial strategic orientation because of financial pressures. The issue was opened to free discussion, which quickly coalesced around the proposition that the journals could be a sound earner for the university, particularly as they were launched electronically. However, discussion also highlighted probable organizational resistance because journals were an academic endeavour; central control over academic activities was not perceived as legitimate within the professional context of academic work. Participants pointed out that it was important not to offend the journal editors and provoke resistance. Therefore, a working group was set up to examine this possible change and report back to the following meeting.

At the following meeting, an interim report from the working group initiated another bout of free discussion. Participants discussed the likely responses to this variation, based on the working group's initial approaches to the editors. As discussion progressed, the meeting built an argument to legitimize the variation, based on its commercial rather than academic dimensions. Despite probable resistance, they asserted the legitimacy of commercial control over the journals because of the university's accountability to the state funding body for all its financial endeavours. Risk and legal liability were raised as reasons why it was no longer appropriate to leave the journals under their current locus of control. The meeting decided that the working group should further develop the proposal, reporting to the next meeting about its legal elements, rather than dwelling on points of academic jurisdiction over the journals.

In this example, free discussion allowed participants to examine the proposed commercialization of the journals, without being restricted by existing orientations towards commercial activity and academic endeavour that were potential sources of resistance. Free discussion enabled participants to develop the proposal in ways that increased organizational receptivity. This micro-variation, while seemingly minor, represented a significant departure from existing strategic orientations as the academic body had been resisting a commercial orientation. Central management of journal revenue was both practically a means of enacting a more commercial strategic orientation and also symbolically important in legitimizing a commercial focus for academic activities. Free discussion, because it enables meeting participants to develop micro-variations, is thus strategically consequential in destabilizing existing strategic orientations.

#### *Restricted free discussion*

Restricted free discussion is based on different principles to free discussion. While restricted free discussion involves opening an issue to discussion without going through the Chair, the Chair retains authority in the background, using it to shape the flow of discussion so that discussion cannot be totally self-organizing. As the restrictions imposed by the Chair tended to be in line with existing strategic orientations, new ideas challenging these orientations were averted. As shown in Table 3, restricted free discussion was primarily associated with stabilizing existing strategic orientations by constraining the emergence of variations or by leading to their de-selection.

Constraining the emergence of variations. In restricted free discussion, the Chair interjects to shape discussion that is perceived as outside top management interests. For example, at Campus the Chair constrained a proposed variation in the long-term strategy for the Humanities Faculty by interjecting that the speaker was “*blurring the agenda lines again*”. In doing so, the Chair devalued the proposed variation within the tenets of the meeting structure, which was to focus upon the agenda. Such interjections, while not reinstating turn-taking through the Chair, reinforce meeting authority structures by heightening participants’ awareness of the Chair’s authority to rein in discussion. For example, participants exchanged grimaces with a close colleague or subsided with a reddened face when the Chair inferred a value to their comments. For these participants the discussion was restricted, while other participants were made aware that only some types of ‘free’ discussion content were acceptable to the Chair.

De-selecting proposed variations. Even where discussion was not totally circumscribed, the Chair could shape restricted free discussion in order to de-select a proposed variation, as illustrated by the following example at Metropolitan. Item 3 on the agenda was a substantial rise in student fees, which was at a stage of being agreed after discussion over several previous meetings. However, the VC as Chair wished to delay the rise because of recent bad press<sup>4</sup>. The VC opened discussion by pointing out that, while a fee rise had been agreed, it was a source of unease and its implications needed consideration. There was then quite a lot of discussion as participants clarified the figures on which the fee increase had been proposed. Throughout this discussion, the VC kept cautioning everyone to “*keep an open mind on the matter*”. He exhorted people to “*have their say*” but not to “*get hot under the collar*”. Discussion continued, with most of the meeting participants committed to resolving the fees issue. One participant pointed out “*We've discussed all this last year. Last year we agreed we had to get the revenue up to help the university to make strategic investments and take risks and build resources as needed*” and that he did not hear any arguments that detracted him from this view. The VC kept calling for a consensus, although the meeting participants were providing one: to increase the fees, as “*every year we delay we make it harder to implement*”. The VC again asked them to try to reach a consensus, at which one participant responded “*I thought you'd got one*”. Eventually, the VC's restriction of free discussion had effect, as the meeting agreed to delay the decision on raising fees for another year. Thus, restricted free discussion differs from free discussion, as the Chair uses the authority accorded by the meeting structures (see Table 2) to restrict discussion and, in this case, to de-select a proposed variation. Restricted free discussion was not always as conclusive in a single meeting, sometimes constraining discussion of a variation over serial meetings before it was eventually de-selected. Restricted free discussion is thus predisposed towards stabilizing existing strategy by constraining destabilizing variations.

#### *Restricted discussion*

Restricted discussion instates formal meeting conduct, particularly structured turn-taking. In this mode each meeting participant is invited by the Chair to speak in turn upon an item.

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<sup>4</sup> The author overheard top managers discussing their desired outcomes for this item as she walked with them to the meeting

Restricted discussion has two implications for stabilizing strategy and minimizing destabilization: constraining the emergence of variations and legitimizing existing orientations (see Table 3).

Constraining emergence of variations. While restricted discussion gives every participant a voice it does not allow self-organizing debate to develop through response and rebuttal. After their turn, individuals cannot further develop their points, while spontaneous responses are delayed because respondents must wait for their turn to speak. Restricted discussion thus generates a particularly formal atmosphere which may discourage participants from voicing novel ideas if still underdeveloped. People instead tend to speak on points that are in line with existing orientations. In our data set no variations emerged during restricted discussion. Rather, restricted discussion, by encouraging contributions in line with existing orientations and discouraging others, confirmed and legitimated existing strategic orientations. For example, at Urban, participants were invited to input to strategic directions for the new planning cycle using restricted discussion. Top managers joked afterwards about the lack of ideas arising from participants; “*Well, that really helped us with our strategic directions. Gave us a lot of steers*”, while another manager pointed out “*but you don't want them to have too much input*”. Thus, restricted discussion tends to have a stabilizing effect by constraining variation and encouraging confirmation of existing orientations, even as it legitimates strategy by asserting the democratic symbols of giving each participant a voice.

#### *Administrative discussion*

Just over 50% of all strategy meeting conduct involved what we labelled ‘administrative discussion’, because it dealt with the administration of existing, previously agreed or non-contentious strategic items, such as progress reports on capital expenditure. This discussion, which always occupied the early part of the meeting agenda, had a largely stabilizing effect because it dealt with items that were not likely to occasion variation, enabling existing strategies to be legitimated through the democratic governance process. No variations emerged during administrative discussion, but necessary work in terms of formal agreements about the ongoing progress of existing, university-wide strategies was performed. This finding suggests that administrative discussion has an important role in stabilizing strategy within the loosely structured, ambiguous context of a university, where participants might otherwise focus upon their own interests to the neglect of organizational interests.

#### *Termination*

In order to have strategic consequences for the organization, items must be terminated within the meeting and re-coupled into the wider social structures of the organization. Termination practices within any specific meeting vary according to whether an item: a) has not been resolved, necessitating bridges to other meetings; or b) has been resolved to the extent that it is to be re-coupled to the organization. These practices, which are summarized in Table 4, are now discussed.

#### **INSERT TABLE 4 ABOUT HERE**

##### *Building bridges to other meetings*

Bridges to other meetings are built through two termination practices, working groups and rescheduling, which have implications for destabilizing existing strategic orientations because they enable variations to be maintained and developed over a series of meetings.

Working groups enable a variation to be developed: Eighteen working groups were established during this study, as well as ongoing reports from working groups established prior to the observation period. Working groups enable a variation to be developed over a series of meetings. Most proposed variations to the status quo were not resolved through a single meeting. Rather, after some discussion a working group was nominated to develop the proposal with consideration for its eventual connection back into the organization, reporting back in the next meeting. Given the inherent inertial properties of professional contexts such as universities, working groups prevent existing strategic orientations from overwhelming proposed variations by ensuring that they are developed over several meetings. Working groups increase the potential for the selection of variations by shaping them towards organizational legitimacies, collecting additional information and building more sophisticated arguments as the working group becomes aware of new points to develop between meetings. For example, the proposal to take central control of the income from academic journals at Metropolitan, explained in the section on free discussion above, was pursued over four meetings through the use of a working group. This group shaped the legitimacy of central control over an academic activity, which would not have been acceptable in the collegial academic context, by developing the auditory and legal requirements for such controls (see also 'stage-managing' example below). At Campus the proposition for a new department in a new disciplinary area was developed by a working group over a series of five meetings, during which participants legitimated the centrality of the department to the University's mission, established its financial viability, worked through resistance and counter-arguments from

another department, and developed a case for the legitimacy of the new department within the wider organization. Similarly, at Urban the proposition to close down a department in a less viable disciplinary area was developed by a working group, which, over three meetings shaped the proposed closure to align with organizational interests in maintaining existing faculty. Working groups provide opportunities to re-couple a variation into the wider organization by developing the case for its legitimacy within existing organizational interests and social structures, often over several meetings (see Table 4).

Rescheduling enables a variation to be maintained: Rescheduling a proposed variation for discussion in a future meeting also builds bridges between meetings, enabling an item to be maintained by delaying decision upon it. Rescheduling has a destabilizing tendency because it allows proposed variations to remain on the agenda, which might otherwise be de-selected due to an unfavourable meeting context or to their nascent state of development. For example, at Campus a proposed variation for growth of capital infrastructure was raised in March at the first financial planning meeting of the year. At that meeting, the proposal appeared unfavourable because of uncertainty over the financial climate and questions about whether the University should grow in the proposed new direction. However, through rescheduling the variation was not abandoned but included in the agenda for the subsequent meeting. It appeared at the next four financial planning meetings, each time being rescheduled on the basis that the university should wait until further information was available. Finally, in October, a decision was made to pursue the growth of capital infrastructure. While the financial climate had not changed dramatically, rescheduling enabled the variation to be kept alive until it was possible to propose financing solutions and overcome initial doubts. Rescheduling thus enables a variation to be maintained until an opportunity arises for its further development. While rescheduling and working groups have common characteristics, the working group actively develops the proposal between meetings while rescheduling more passively enables it to be maintained between meetings. Both have implications for destabilizing existing strategic orientations by preventing a variation from being abandoned.

#### *Re-coupling to the organization*

Termination also involves variations that have been resolved as far as possible within the capacity of the meeting. At this stage, the proposed variation goes through some form of validation that re-couples it to the social structures of the organization. For example, proposed variations

were usually presented and approved at the Academic Board, a large open meeting with high academic representation. We found two practices for re-coupling a variation that had different implications for organizational receptivity and, hence, the likelihood of stabilizing or destabilizing strategic orientation: voting and 'stage-managing re-coupling'.

Voting tends to de-select variations: Voting was used when variations could no longer be maintained through working groups or rescheduling. Voting only occurred twice in the 51 meetings we observed, both times on proposed variations that had not been able to reach a more consensual form of resolution. The first instance of voting was in response to a highly contentious change in the structure of the academic year at Urban that would have resulted in a major shift in the University's teaching orientation. The proposal was formally de-selected as it was not supported in the vote. The second instance of voting at Metropolitan dealt with proposed variations to the student profile that indicated longer-term changes in the University's disciplinary orientation. This variation was also de-selected, albeit informally, as the proposed variation was only successful by a single vote and so lacked sufficient support for strategic change. As voting tends to be used with controversial variations where a more consensual resolution seems unlikely, it is natural that positive voting results encounter strong resistance during implementation; otherwise the meeting participants would not have resorted to voting (Olsen 1972). Thus, while we have only two instances of voting, and it is possible that voting might have other outcomes, in our data, voting is associated with a tendency to de-select variations. Voting in this data mostly stabilizes existing strategic orientations by leading to the de-selection of variations.

'Stage-managing re-coupling' enables selection of variations: Even when a proposed variation has been worked through extensively, using the various meeting practices described above, it has to be presented in ways that increase its chances of selection into the wider organization. We found a typical termination practice that we labelled 'stage-managing re-coupling' because it considers organizational audience's responses to a proposed variation. Stage-management connects with audience's receptivity by integrating a variation into the legitimate social structures of the organization, such as the expectation for collegial, democratic forms of governance within a university. By increasing the chance that a proposed variation to existing strategic orientation will be favourably received by the wider organization, stage managing has a destabilizing tendency. For example, at Urban top managers canvassed departmental views on strategic directions through

a questionnaire, following which they decided the strategic parameters for the next planning cycle. While these parameters were no longer negotiable, care was taken to stage manage their presentation in order to increase their acceptability at a Staff Strategy Day. The Deputy Vice-Chancellor who was chairing the day changed the wording of the item on the initial Strategy Day agenda from 'Results of the Questionnaire' to 'The Views of Departmental Heads'. This careful wording increased the participative and democratic tone of the presentation, stage-managing the collegial appeal of the strategic directions.

This example at Metropolitan illustrates how stage-managing enables the selection of variations through careful consideration of the organizational structures in which they will be received. At Metropolitan decisions recommended by the main Resource Planning Committee (RPC) had to be approved by the Academic Board. On the issue of central control over commercial revenue from journals, RPC members emphasized the importance of wording their report for Academic Board. One participant said "*I really think this is one where we need to tread carefully. We are in danger of being a bit too cavalier*", while the DVC and the Registrar suggested that they incorporated the auditor's point that all revenue-generating activities should be pursued under the auspices of value-for-money, which included the journals. This wording established that the variation was not a bid for central control but a response to external factors, which is more legitimate within collegial governance structures that have low tolerance for managerial control. The meeting then discussed how to implement the variation without "*getting the editor's backs up*". They decided to ask the Board to nominate a journal representative who could be on a Journal Sub-Committee to manage commercial revenue from journals, which would give the Board a voice in implementing the variation, whilst neatly side-stepping the issue of giving the Board a voice in deciding on the variation.

Eventually, when the journals issue was presented to Academic Board, there was a single carefully worded paragraph in the agenda, stating that the RPC recommended that the journals came under the auspices of a journals sub-committee of the RPC because of their legal status and the obligations placed on the university in the event of financial problems; the scope for increasing revenue by raising subscriptions; and the scope for reducing production costs. In order to action this recommendation, the board was asked to nominate a member to sit upon a Journals Sub-Committee. The presentation explained each of these points briefly, and summarized the working

group process used to reach this decision. The neutral tone of the wording and the evidence that a consultative working group process had been used in decision-making enhanced organizational receptivity; the potentially contentious variation was accepted as part of an evolving commercial strategic orientation. In all of the instances of stage-managing re-coupling we observed, the proposed variations were accepted with little discussion or dissent by the organization. Stage-managing thus has implications for destabilizing existing strategic orientations.

## **SECOND SECTION: A TAXONOMY OF MEETING STRUCTURES**

The first section explained how meeting practices are associated with stabilizing or destabilizing strategic orientations according to whether they enable or constrain the emergence, development and selection of variations. This second section furthers the analysis by examining the paths through which variations evolve as they are shaped by different combinations of meeting practices across serial meetings. Fifteen variations were traced through a chronological sequence of meetings. Of these 11 were selected and four were de-selected. We found an association between particular meeting practices and the micro-evolutionary path that these 15 variations took. This analysis resulted in an empirically-grounded taxonomic classification of the meeting practices identified in section one (see Tables 2-4) and the role those structures play in the *emergence* of a variation, its *maintenance and development*, and its *selection or de-selection*. Figure 1 illustrates this taxonomy and the three main micro-evolutionary paths that we found, explaining how meeting practices shape variations that lead to the stabilization or destabilization of existing strategic orientations. We now describe these three paths, presenting a representative example for each. Appendix A lists the 15 variations we traced.

### **INSERT FIGURE 1 ABOUT HERE**

The first path that we identified (Figure 1, Path A), showed how a variation progresses to selection: emerging during free discussion (1a), building bridges to other meetings through either working groups (2a) or rescheduling (2b) that enable its maintenance and development in iteration with further instances of free discussion (3a) before finally being selected through stage-management of its re-coupling to the organization (4a). An explanation of this path is provided through a representative example of variations to the resource allocation mechanism at Metropolitan University, in order to shape a change in the size and scope of different disciplines. Initially the proposal for a new resource mechanism emerged in the Resource Planning Committee

(RPC) during free discussion of strategic problems with the University's disciplinary profile, which was growing excessively in some areas and squeezing out disciplines in other areas. A new resource mechanism, based on much tighter cost accounting and transparent subsidizing of departments was proposed as a way to control and shape a new disciplinary profile. Participants were well aware that this would be highly contentious within the wider University. They established a working group to consider the viability of the proposal. This working group reported to the next meeting with some suggestions on how the resource mechanism might work and where they saw the key points for organizational resistance. The meeting engaged in free discussion of the working group report, establishing the type of metrics they would need to understand the implications of the new resource mechanism, which the working group was then commissioned to develop. At the next meeting, free discussion coalesced around points of organizational receptivity and resistance, which the working group then worked upon. At the next meeting, participants declared the new resource mechanism workable and used free discussion to work through the best way to introduce the proposal to the wider organization, carefully stage-managing their presentation to fit the collegial structures of the University. The new resource mechanism was then tabled at Academic Board, where it was accepted. A similar evolutionary path was followed with ten other selected variations across the three cases.

The second path we found (Figure 1, Path B) shows how a variation is de-selected at the point of re-coupling to the organization: emerging during free discussion (1a), bridging to other meetings through rescheduling (2b), where it was the subject of restricted free discussion (3b) in one or more meetings before finally being presented to the wider organization, culminating in voting and de-selection (4b). A representative example of this path was a proposed variation to shorten and restructure the academic teaching year at Urban University. This variation emerged during free discussion, being proposed as one solution to the dominance of undergraduate teaching within the profile of strategic activities. Meeting participants were aware that this variation was likely to be contentious, because Urban was a teaching-led university with strong academic commitment to undergraduate teaching. They felt that the best way to manage this was to restrict too much negative discussion of the proposal at subsequent strategic planning meetings, simply presenting further information on the necessity to minimize undergraduate teaching at each of these meetings. While rescheduling and restricted free discussion enabled the proposal to be

maintained, it did not permit the variation to be developed with consideration for its wider organizational legitimacy. Rather, the meeting participants convinced themselves that they could push through this unpopular variation. However, when it was presented to Academic Board, the academic audience was clearly unhappy with the proposed variation. As Academic Board is a decision-making body, the proposal had to be put to the vote, where it was de-selected as the majority vote went against the changes. Thus, the existing teaching-led strategic orientation was stabilized because the potentially destabilizing variation was de-selected. A similar de-selection path was followed with a variation at Metropolitan.

The first two paths contrast in the way that variations were developed and selected/de-selected, which might suggest that selected variations are associated with one type of path from their emergence, while de-selection results when a variation sets off on a different type of path from emergence. Compared to these two paths our third path (Figure 1, Path C), found in two cases at Metropolitan and Campus, illuminates the way that authority structures of the meeting – explained in the initiation practices – accord power to top managers to arrest the development of a variation and alter its path towards de-selection before it reaches the point of re-coupling to the organization. In this path, a variation may emerge (1a or 1b) and be developed over successive working groups and rescheduling (2a or 2b) but then be arrested and de-selected during restricted free discussion (3b) without progressing to the organizational interface. The Metropolitan example explains the de-selection of the student fees variation, which was discussed in section one (restricted free discussion, p. 21-22). At Campus, the proposed variation was to change the governance structures of the University, developing a more devolved administrative and resource allocation model. This proposal arose during restricted free discussion and was not popular with top managers. However, the item was rescheduled and then had one iteration between free discussion and a working group before top managers used their authority to delay the variation's appearance on the agenda of the next meeting, rescheduling it for a later meeting, at which they were able to exert sufficient influence through restricted free discussion to have the variation de-selected. The authority structures established during meeting initiation are thus contributing factors in stabilizing or destabilizing strategic orientations because of the way they accord symbolic power to top managers, despite the ostensibly low power of such managers within university contexts.

## **DISCUSSION AND CONTRIBUTIONS**

This paper has answered our research question: *How do strategy meetings contribute to stabilizing or destabilizing of strategic orientations* in two ways. First, our findings show how specific meeting practices instantiated during the initiation, conduct and termination of meetings are implicated in either stabilizing or destabilizing strategic orientations. Second, we found three different evolutionary paths that a potential variation may take as it progresses through a taxonomy of meeting practices, from emergence through maintenance and development, to selection or de-selection of the variation and the associated stabilizing or destabilizing of strategic orientations. These three evolutionary paths, illustrated in Figure 1, may not be the only possible paths for a variation to take. Our paths are empirically substantiated and the meeting practices identified in the first section indicate the likelihood for a variation to emerge, develop or be selected according to the specific practices that it encounters. However, we found fewer incidences of some meeting practices, such as voting. Our taxonomy is thus explanatory of our data but also provides grounds for further research with a wider sample of studies.

Figure 1 illustrates those meeting practices that appear to be more associated with stabilizing, rather than destabilizing strategic orientations. While some practices, such as restricted free discussion, may be used to support stabilization by suppressing potential destabilizations, other practices, such as restricted discussion and, particularly, administrative discussion, which was the main form of meeting conduct found, seem designed to enable the organization to maintain stability. Some meeting practices within our taxonomy were thus more implicated in stabilizing strategy orientations than with their destabilization. These findings, which extend and elaborate Hendry and Seidl's (2003) framework, contribute to the literatures on strategy-as-practice and stability/change within which we framed our study. Additionally, the empirical context, universities, enables us to contribute to the literature on strategy-making in universities. In the following we will discuss these contributions in turn.

First, our study has been framed within the strategy-as-practice literature, which treats strategy as a situated, socially accomplished activity; focussing upon the unfolding nature of strategy as interplay between wider social practices and the micro-level of situated actions, interactions and negotiations, as actors draw upon these practices to construct strategic activity (Johnson et al. 2003; Whittington 2006; Jarzabkowski et al. 2007). As such strategy-as-practice agendas call for empirical studies into the way that social practices, such as tools, technologies or

discourses, are implicated in situated strategizing activities. We make a contribution to this line of research by analysing one particular social practice; strategy meetings, showing that they are consequential for the evolution of an organization's strategic orientations. We argue that it is not only the meeting that is a consequential strategy practice but also the various combinations of initiation, conduct and termination practices that constitute the meeting. In section one of the results (Tables 2-4), we identified eleven practices that had implications for stabilizing or destabilizing strategic orientations. Our findings in section two further demonstrate that it is not sufficient to study meetings in isolation. Rather, most developments unfold over a *series* of successive meetings. As our three evolutionary paths show, it is the combination of different practices across several meetings that shape whether a proposed variation stabilizes or destabilizes strategic orientations. We thus contribute to the strategy-as-practice research agenda by explaining how the cumulative implications of a strategy practice, such as strategy meetings, are consequential for organizational strategy.

Second, our focus on the implications of practices, such as meetings, for stabilizing or destabilizing strategic orientations was theoretically informed by an increasing interest in the micro-mechanisms of stability and change in organizations, in which organizations are conceptualized as in a continuous state of becoming (Feldman 2000; Orlikowski 1996; Tsoukas and Chia 2002; Weick 1979). Advocates of this perspective have argued that we should not give ontological priority to stability; taking stability as a starting point, so that our focus is upon explaining change. Instead we need to understand stability itself as a social accomplishment that is actively created and cannot be taken for granted. Our study contributes to this line of reasoning by demonstrating how meetings not only lead to change but also actively create stability, for example by reproducing legitimation or by fending off challenges to existing strategic orientations. Particular meeting practices, such as administrative discussion and restricted discussion, were associated with stabilization of existing strategic orientations, while others, such as working groups and free discussion, were associated with a destabilization tendency. Beyond specific practices, we showed that stabilization and destabilization of strategic orientations depends very much on the particular combination of meeting practices. In Figure 1, we show how practices combine to form micro-evolutionary paths, performing different evolutionary functions of emergence, maintenance and development, and selection or de-selection, according to their

position in the evolutionary process. Our study thus contributes to studies of the association between stability and change by demonstrating how relatively stable meeting practices that occur regularly in our cases are associated with constructing change.

Third, we addressed the topic of meetings and their role in stabilizing or destabilizing strategic orientations by taking Hendry and Seidl's (2003) framework as a conceptual guide. This framework, proposed in an initial special issue on strategy-as-practice, conceptualizes the way that organizations achieve strategic change, given the strong predisposition for strategic stability in their everyday practices and routines. They proposed that episodes, such as meetings and strategy workshops, provide a suspension of everyday organizational structures, in which a new set of episodic structures may govern and alter the interactions amongst participants to the extent that they may step outside existing orientations and propose potential variations. We drew upon this conceptual framework to guide our analysis but applied it in a loosely-coupled professional context (Weick 1976), rather than the traditional tightly-structured machine bureaucracy implied by Hendry and Seidl. We do find that suspension of structures is relevant within a loosely-coupled context; for example, by relinquishing departmental or professional interests for university interests and accepting the authority structures implicit in a meeting, participants are suspending some of the professional structures through which they practice their everyday work. Furthermore, the efforts taken to stage-manage re-coupling, increasing receptivity by aligning the proposed variation with the social structures of the organization, is an indicator that the meeting at least partially suspends organizational structures. However, the real focus of our study, given the loose-structuring of universities, was on the practices that instantiate social structure within a meeting.

These practices seem to be important in enabling the 'organized anarchy' (Cohen and March 1974) to coordinate interests sufficiently to pursue university-wide strategic action. In particular, they enable top managers, who typically have low authority within a professional organization (Cohen and March 1974; Denis et al. 1996; 2001), to assume the authority accorded by meeting practices in order to shape strategic orientations. We might, therefore, speculate that meetings are important within the loosely-coupled context of universities, establishing a set of practices that enable strategic action. In particular, given the fragmented, goal-divergent, pluralistic interests within universities, meeting practices might serve an important function in stabilizing the university's overarching orientations and giving authority to one group to shape the university in

particular directions. Future research might examine how meeting practices vary in more loosely- or tightly-coupled organizational contexts and the implications of this variation for their tendencies towards stabilization or destabilization of strategic orientations.

Fourth, our study contributes to the literature on strategy-making in universities. Universities are portrayed as ambiguous, goal-divergent contexts, fragmented by pluralistic demands and interests (Cohen and March 1974; Denis et al. 2007; Hardy 1991; Jarzabkowski and Fenton, 2006). In such contexts, strategy making is conceptualized as a garbage can, in which strategy emerges from the random confluence between problems, solutions, participants and choice opportunities (Cohen et al. 1972). Our findings suggest that meetings provide some structure to the garbage can, assembling particular participants whilst excluding others. At the same time, initiating a meeting and setting an agenda provides a focus for the types of problems and solutions that may be considered. Participants may have their own perceptions of problems, while solutions may carry over between meetings or from the outside organization. However, meetings also provide a set of social practices that shape how problems and solutions may be expressed, excluding some from the strategic arena. Indeed, the meeting might be considered a space for choice opportunities about strategy, in which specific meeting practices, such as working groups and rescheduling, combined with various forms of turn-taking conduct, can shape the length of time that a choice opportunity remains open, so influencing the types of solutions it might attract. For example, proposed variations can be maintained and their solutions can be developed over serial meetings, until an opportunity for selection becomes apparent. The meeting also provides an authority structure in which top managers, who typically have low control in university contexts, are able to exercise influence over strategy making. Cohen and March (1974) suggest that politically skilled leaders may shape university strategy, even within the constraints of the garbage can (see also Denis et al. 1996). Our findings indicate that the social practices instantiated in strategy meetings enable this influence over strategy-making by structuring the garbage can, despite the ambiguous and divergent professional tendencies of the organization.

The findings from this study have implications for practice. Managers in democratic, consensus-based contexts such as universities, which typically have diffuse power relationships and multiple and ambiguous goals, are under increasing external pressure to generate a coherent strategic response from their organizations, whilst at the same time being constrained in their

ability to act by management fiat (Denis et al. 2001). Managers in such contexts might use the findings here to reflect upon their own skills in shaping the structure and conduct of democratic governance mechanisms, such as meetings, and how these might be better employed to enhance both proposals for strategic change and also organizational receptivity to change.

A limitation of this study is that it has been conducted in a single sector. However, in keeping with other professional organizations, such as hospitals, cultural organizations and policy-making bodies, universities tend to have diffuse power relationships and low capacity to act by management fiat (Denis et al. 2001). In such contexts, meetings prevail as governance mechanisms (Simon 1997; Terry 1987). Therefore, our findings are expected to have relevance in these other contexts that share characteristics with universities.

This paper has provided some insights into the strategic role of strategy meeting that hopefully will stimulate further research on this important topic. In particular, future comparative research might examine how our findings apply across a range of contexts, such as national contexts. Do university meetings in other countries play the same role as those in our British context? Other organizational contexts are also of interest, such as other professional organizations as well as comparisons of the role of meetings in private and public organizations, given their different needs for democratic forms of legitimation. Additionally, in line with a growing interest in the interaction between the wider social context and change in organizational practices (Johnson et al. 2003; Whittington 2006; Lounsbury and Crumley 2007), future research might attend to the various ways in which institutional dynamics interact with the stabilizing and destabilizing tendencies of various meeting practices.

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## **Appendix A: Variations traced through a series of meetings**

### **Path A: Variation selected**

#### **Campus**

- The opportunity to develop a major science department in a key new area, which was a departure in disciplinary profile for the University, emerged during free discussion. The variation progressed through free discussion at a series of meetings, using working groups as bridging mechanisms, as the details and potential resistances were worked out. It was then stage-managed at two large meetings and selected.
- The problem of increasing research income grants & contract income arose during free discussion and a structural variation of a new management committee was proposed to help increase income in this area. The new structure was viewed as potentially very contentious but was worked through with a series of working groups and ongoing free discussion, then stage-managed at a large open meeting and selected.
- Variations to the capital growth plan, in new areas that would significantly extend the University's capital expenditure, emerged at an open meeting with free discussion. The variation was raised a number of times for further free discussion, using rescheduling as a bridging mechanism, and then was financially modelled in a working group before further discussion. It was then stage-managed at a University decision-making body and selected.
- The opportunity to develop an income stream from two new business activities that were neither academic nor facilities related (the main external income streams at Campus) were proposed during free discussion at an income meeting. As these would be management activities of an entrepreneurial nature, they were discussed and had the details worked through with working groups over several meetings to be sure that they would be viable and would not clash with the academic purpose of the University. They were then proposed and selected at an open decision-making meeting.

#### **Metropolitan**

- A variation in departmental structure, based around grouping a number of disciplines within a hybrid departmental/faculty structure in order to better leverage these disciplines research output for the RAE and teaching complementarity for student recruitment, was proposed during free discussion. This was seen as highly contentious because it would interfere with academic autonomy. It was worked through a series of meetings, with working groups as bridging mechanisms before being stage-managed and selected at a decision-making meeting.
- Taking central control of revenue from journals. Explained in the free discussion and stage-managing parts of section one.
- A proposal to develop cohesive professional branding, similar to business branding, in order to increase the University's appeal and recognition in the marketplace emerged during free discussion. This was potentially contentious because of its cost and its business/ private sector connotations. It was worked through a series of meetings, initially using rescheduling as a bridging mechanism and then working groups to develop the details, before being stage-managed and selected at a decision-making body.
- Variation to the resource allocation model: Explained in the taxonomy in section two.

#### **Urban**

- A proposal to develop industry and professional training partnerships in order to increase income, arose during free discussion in a small top team meeting. The proposal was rescheduled at a larger meeting, where it was the subject of free discussion that was largely favourable although concerned about financial and reputational risk. These details were worked through a series of meetings, using working groups as bridging mechanisms, before being stage-managed and selected at a decision-making body.
- During free discussion, the proposal arose that Urban should heed the signals from the budget model and close a department that was no longer financially viable. This was a major variation, as no department had ever been closed. The proposal was discussed at two further meetings, using a working group as a bridging mechanism to work out staff and student details and issues

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for presenting the decision. The proposal was then stage-managed and selected at the governing board.

- During free discussion, a proposal arose to reorient the student profile towards more active international recruitment, particularly at postgraduate level. This was a significant variation, as Urban had largely had a domestic undergraduate student body. The proposal was rescheduled and discussed in three more meetings before being stage-managed and selected at the academic decision-making body.

**Path B: Variation de-selected at proposal to the organization**

- Teaching year at Urban: Explained in the taxonomy in section two.
- At Metropolitan a proposal arising during free discussion to alter the student recruitment policy, in order to shape the student profile and balance towards particular geographic regions and financial backgrounds was considered quite contentious. While the proposal was rescheduled and discussed over four meetings, when it was finally proposed to the academic board, it was rejected.

**Path C: Variation de-selected prior to proposal to the meeting**

- Variation in student fees at Metropolitan: Explained in restricted free discussion in section one.
- Variation in governance model at Campus: Explain in the taxonomy in section two.

**Table 1: Summary of meeting data set**

<b>Campus University</b>	<b>Metropolitan University</b>	<b>Urban University</b>
<ul style="list-style-type: none"> <li>▪ 7 x Main strategy committee (<i>Open</i>)</li> <li>▪ 6 x Main commercial income group (<i>Open</i>)</li> <li>▪ 5 x Main academic resource committee (<i>Open</i>)</li> <li>▪ 1 x Other strategic working party (<i>Open</i>)</li> </ul> <p><b>Total = 19</b></p>	<ul style="list-style-type: none"> <li>▪ 7 x Main academic resource committee (<i>Open</i>)</li> <li>▪ 2 x Governing committee (<i>Open</i>)</li> <li>▪ 1 x Academic governance committee (<i>Open</i>)</li> <li>▪ 1 x Strategic meetings with department heads (<i>Open</i>)</li> <li>▪ 6 x Other administrative committees (5 <i>Closed</i>, 1 <i>Open</i>)</li> </ul> <p><b>Total = 17</b></p>	<ul style="list-style-type: none"> <li>▪ 3 x Main top managers meeting forum (<i>Closed</i>)</li> <li>▪ 2 x Governing committee (<i>Open</i>)</li> <li>▪ 2 x Strategy meetings with department heads (<i>Open</i>)</li> <li>▪ 1 x Academic governance committee (<i>Open</i>)</li> <li>▪ 6 x Other consultative TMT meetings (<i>Open</i>)</li> <li>▪ 1 x Strategy day between TMT and Board (<i>Closed</i>)</li> </ul> <p><b>Total = 15</b></p>

**Table 2: Meeting Initiation Practices and Their Implications**

Meeting practices	Implications for stabilizing/destabilizing strategy
<b>1. Bracketing participants in central location:</b> • 48 out of 51 meetings	<ul style="list-style-type: none"> <li>• Physically and symbolically privileges top manager authority over meeting</li> <li>• Not innately stabilizing or destabilizing, but accords top managers some influence over these according to their own interests</li> </ul>
<b>2. Setting agenda</b> • Set on the day or the day before for 8/9 closed meetings (exception: Strategy day) • Set a minimum of 1 week in advance for all 42 open meetings	<ul style="list-style-type: none"> <li>• Privileges top manager influence over what will be included in the agenda, albeit not totally</li> <li>• Gives top managers authority over the order of agenda items, which they may manipulate, according to their interests in the potential of those items to stabilize or destabilize strategy (see administrative discussion in 'Conduct').</li> <li>• Not innately stabilizing or destabilizing, but accords top managers some influence over these according to their own interests</li> </ul>
<b>3. Chairing meeting:</b> • Chaired by top manager in 47/51 meetings and by governing body Chair in the other 4	<ul style="list-style-type: none"> <li>• Privileges top manager authority over conduct of meeting</li> <li>• Not innately stabilizing or destabilizing, but accords top managers some influence over these according to their own interests (see sections on Conduct)</li> </ul>

**Table 3: Meeting Conduct Practices and Their Implications**

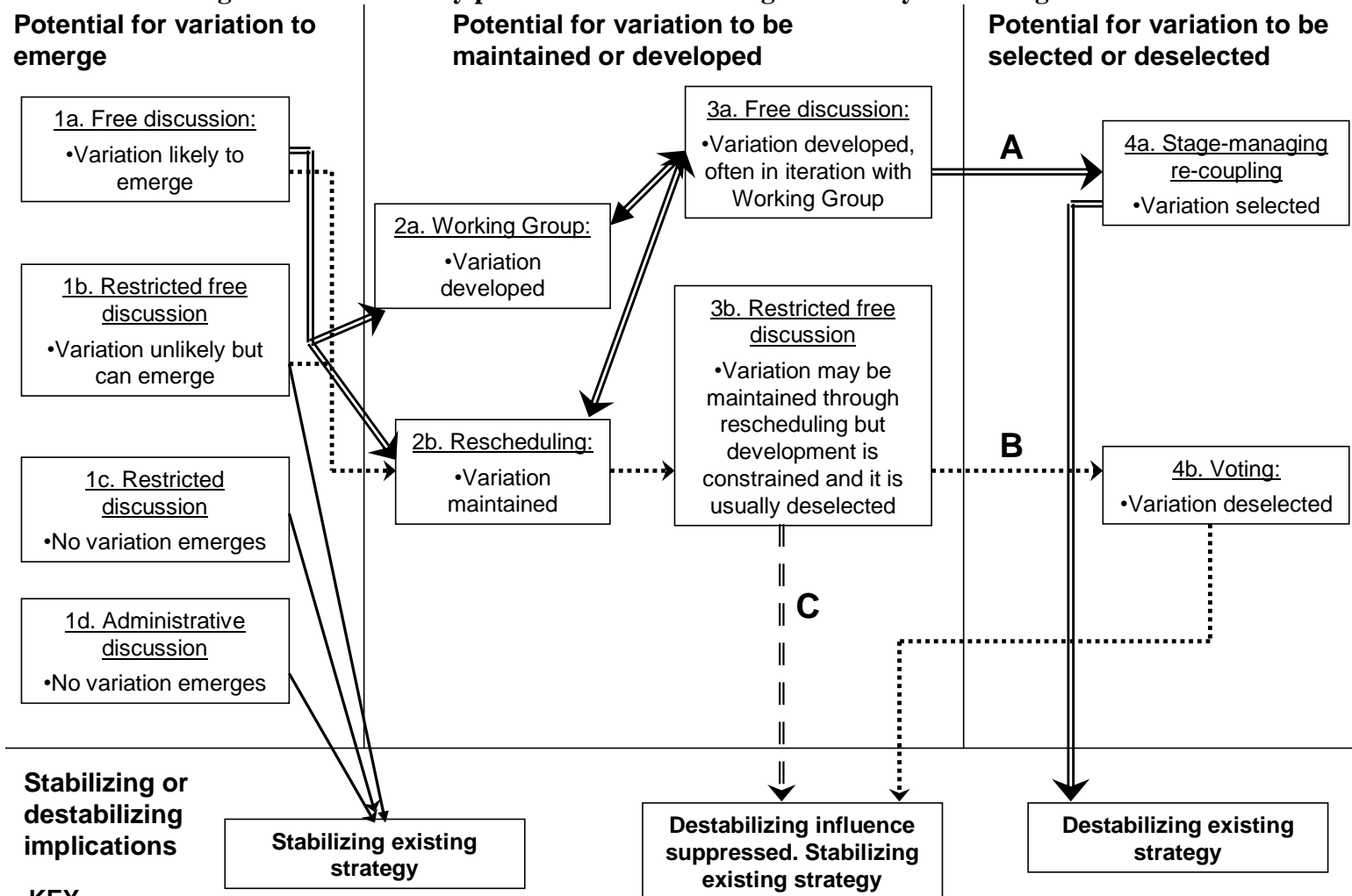
Meeting practices	Implications for stabilizing/destabilizing strategy
<p><b>4. Free discussion</b>  <b>71/306 instances:</b></p> <ul style="list-style-type: none"> <li>• <b>21 in 9 closed meetings;</b></li> <li>• <b>50 in 38 open meetings</b></li> <li>• <b>63 of 71 instances were associated with emergence or development of proposed variations</b></li> </ul>	<ul style="list-style-type: none"> <li>• Chair suspends authority over turn-taking, enabling self-organizing discussion, in which participants respond directly to each other</li> <li>• Tends towards destabilization of existing strategy because:               <ul style="list-style-type: none"> <li>• Potential variations can emerge (14/71 instances of free discussion involved emergence of a variation)</li> <li>• Potential variations can be developed across serial meetings (49/71 instances of free discussion involved development of a variation).</li> </ul> </li> </ul>
<p><b>5. Restricted free discussion</b>  <b>65/306 instances:</b></p> <ul style="list-style-type: none"> <li>• <b>3 in 9 closed meetings;</b></li> <li>• <b>62 in 27 open meetings</b></li> <li>• <b>57 instances out of 65 were associated with constraining the emergence and selection of variations</b></li> </ul>	<ul style="list-style-type: none"> <li>• Chair appears to suspend authority over turn-taking, by opening an agendum to discussion, but continues to control its parameters, so that self-organizing discussion cannot take place</li> <li>• Tends towards stabilization of existing strategy because:               <ul style="list-style-type: none"> <li>• Potential variations are constrained from emerging (Only 1/65 instances of restricted free discussion involved emergence of a variation).</li> <li>• Potential variations are de-selected (39/65 instances of restricted free discussion that, over serial meetings, constrained or lead towards de-selection of potential variations).</li> </ul> </li> </ul>
<p><b>6. Restricted discussion</b>  <b>14/306 instances:</b></p> <ul style="list-style-type: none"> <li>• <b>All in 9 open meetings</b></li> </ul>	<ul style="list-style-type: none"> <li>• Discussion follows structured turn-taking through the Chair, with each participant being invited to speak in turn upon an agendum. No self-organizing discussion is possible, as participants are not free to respond to each other out of turn.</li> <li>• Tends towards stabilization of existing strategy because:               <ul style="list-style-type: none"> <li>• Constrains emergence of potential variations (no instances of variations emerging in this mode within our data).</li> <li>• Enables democratic participation in and legitimation of existing strategic orientations without introducing variation.</li> </ul> </li> </ul>
<p><b>7. Administrative discussion:</b>  <b>156/306 instances:</b></p> <ul style="list-style-type: none"> <li>• <b>Occurred across the entire 51 meetings</b></li> </ul>	<ul style="list-style-type: none"> <li>• Discussion and reporting on existing, previously-agreed strategic items. At least the first two agenda items in every open meeting and the first agendum in every closed meeting involved administrative discussion.</li> <li>• Stabilizes existing strategy because it :               <ul style="list-style-type: none"> <li>• Deals with items that are not likely to occasion variation (no instances of variations emerging in this mode within our data)</li> <li>• Enables democratic participation in and legitimation of existing strategic orientations without introducing variation.</li> </ul> </li> </ul>

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**Table 4: Meeting Termination Practices and Their Implications**

<b>Meeting practices</b>	<b>Implications for stabilizing/destabilizing strategy</b>
<p><b>Building bridges to other meetings:</b>  <b>8. Working Groups: 18 established in open meetings, ranging from bridging to 1 other meeting to bridging across 5 meetings</b>  <b>9. Re-scheduling: 13 instances in open meetings, 5 of which were rescheduled more than once and up to four times</b></p>	<ul style="list-style-type: none"> <li>• WG comprise a subset of participants from the main meeting, with the remit to develop information and options on a specific agenda item, which can then be reported back to the main meeting for further discussion.</li> <li>• WGs tend to destabilize existing strategy by enabling a potential variation to be developed over a sequence of meetings.</li> <li>• Rescheduling is referring an item to be discussed at a future meeting, without actively developing it between meetings.</li> <li>• Rescheduling tends to destabilize existing strategy by enabling a potential variation to be maintained on the agenda over a sequence of meetings.</li> </ul>
<p><b>Re-coupling to the wider organization:</b>  <b>10. Voting: 2 instances</b>  <b>11. Stage-managing: 11 instances</b></p>	<ul style="list-style-type: none"> <li>• Voting adheres to the democratic governance process in universities but was not typically used in our data, where it indicated that an item has not been resolved through more consensual forms of governance.</li> <li>• Voting tends to de-select variations. In the two instances of voting, one variation was formally de-selected by losing the vote, while the other was informally de-selected by winning the vote too narrow a margin to be implemented.</li> <li>• Stage-managing refers to the re-coupling of a variation through careful consideration of the organization as an audience, whose receptivity is dependent upon the way a variation integrates into its social structures.</li> <li>• Stage-managing enables selection of variations. All 11 variations that had been maintained and developed to the stage of re-coupling to the organization through stage-managing were selected.</li> </ul>

**Figure 1: Evolutionary path of variations through taxonomy of meeting structures**



## AUTHOR BIOGRAPHIES

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