

2010

A marketing discourse framework for charities

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Recommended Citation

Chad, Paul, A marketing discourse framework for charities, Doctor of Philosophy thesis, School of Management & Marketing, University of Wollongong, 2010. <http://ro.uow.edu.au/theses/3656>

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A MARKETING DISCOURSE FRAMEWORK FOR CHARITIES

A thesis submitted in fulfilment of the
requirements for the award of the degree

DOCTOR OF PHILOSOPHY

from

UNIVERSITY OF WOLLONGONG

by

Paul CHAD, B.Sc.(Hons), MBA, M.Com.(Mktg)

Faculty of Commerce

School of Management & Marketing

2010

CERTIFICATION

I, Paul A. Chad, declare that this thesis, submitted in fulfilment of the requirements for the award of Doctor of Philosophy, in the School of Management and Marketing, University of Wollongong, is wholly my own work unless otherwise referenced or acknowledged. The document has not been submitted for qualifications at any other academic institution.

Paul A. Chad

8 November 2010

ACKNOWLEDGEMENTS

The helpful advice, direction and constructive comments from my supervisors Professor Judy Motion (University of New South Wales) and Dr Elias Kyriazis (University of Wollongong) are gratefully acknowledged. As is the support from other University of Wollongong Faculty of Commerce staff including Dr Greg Kerr, Professor Trevor Spedding, Professor Patrick Dawson and Associate Professor Rod Clarke as well as Professor Les Johnson (Melbourne Business School).

The email comments offered from afar in the early stages of this research by Professor Philip Kotler (Northwestern University), Professor Kathleen Eisenhardt (Stanford University), Professor Christian Grönroos (Hanken Swedish School of Economics), Professor Evert Gummesson (Stockholm University) and Professor Robert Stake (University of Illinois) provided great motivation. Email correspondence with Professor Norman Fairclough (Lancaster University), Professor Teun van Dijk (Universitat Pompei Fabra) and Professor Deborah Schiffrin (Georgetown University) regarding aspects of discourse also provided inspiration.

Comments and feedback from Professor Suzanne Beckmann (Copenhagen Business School) and Professor Sabrina Helm (Witten/Herdecke University) at ANZMAC 2007 during the development of the research foundation assisted with ensuring the research was ‘on-track’.

Useful assistance and guidance from the University of Wollongong Commerce Librarians and staff of the Sydney Business School, in particular Professor John Glynn, Dr Grace McCarthy and Dr Mark Rix are also acknowledged.

The support from Leanne and the constant supply of food from my parents is also greatly appreciated – and my local beach and cycleway as locations of

contemplative inspiration and reflection throughout the development of this thesis were hugely beneficial.

Finally, a big thank you to my parents – I couldn't have done this without you – this thesis is for you.

Publications in support of this thesis

Chad, P 2007, 'Application of a Marketing Orientation Within Non-Profit Charities', UOW HDR Student Conference, Wollongong, 26 September 2007, p. 38.

Chad, P 2007, 'Development of Services Marketing Frameworks for Non-Profit Charities: An Application of the Marketing Orientation', ANZMAC 2007, Doctoral Colloquium, Dunedin, 1-2 December 2007.

ABSTRACT

The accepted view within the for-profit literature is that the marketing concept can be operationalised within an organisation via adoption of a market orientation, and is associated with improving organisational performance. It is also considered that a market orientation can benefit organisations within the not-for-profit sector. Relative to within the for-profit sector, research into market orientation is an under-researched area within the not-for-profit sector (including the charity sub-sector). An aspect with virtually nil research is how to successfully introduce a market orientation within not-for-profit organisations.

This thesis examines the process of introducing and legitimising a marketing discourse into charity organisations and subsequently develops a conceptual best practice framework to guide the management of change within charities as managers try to improve organisational performance. The management challenges of introducing a discourse transformation are examined, focussing particularly on how to increase the market orientation within operations with employees who did not necessarily understand the need for change. A discourse transformation, in other words, organisational change, can be considered to have occurred if participants understand or 'know' the world differently and act differently than they did previously. The experiences of managers and employees in three Australian charity organisations are examined and the thesis reports on the process, impact on individuals and the change in organisational focus and language following the discourse transformation.

Whilst various literature suggests a market orientation is relevant for charity organisations, research in this thesis shows introduction of market orientation is not

straight-forward. A key finding is that charities must firstly become more businesslike (via new managerialism) and professional prior to attempting to increase market orientation. Secondly, management of the charity must choose the specific form of market orientation that can be successfully legitimised within the organisation, and select appropriate strategies to enable the legitimisation. What can be legitimised is typically based around key aspects of the previous culture and legacy discourse, thus different charities are likely to acquire differing perspectives of market orientation. The results explain three contrasting case studies of how change was introduced and the type of change. A conceptual best practice framework is developed that identifies the optimal approaches for management to adopt in introducing an appropriate style of market orientation to improve organisational performance. The thesis thus provides a significant contribution to filling gaps in academic knowledge as well as contributing to the advancement of managerial practice.

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CHAPTER ONE : INTRODUCTION

1.1 Chapter Outline

This thesis examines the introduction of a marketing discourse into three Australian charity organisations. In this thesis, marketing discourse is regarded as containing the dimensions of market orientation that are regarded by Lafferty & Hult (2001) to be emphasis on customers, importance of information, inter-functional coordination and taking action. The chapter opens with a background section that discusses the nature of not-for-profit organisations and focuses on charities. The problem orientations examined in the thesis are the increased competition amongst charities (particularly for funds), the resultant need to change, and the potential improved performance offered to charities via introduction of marketing discourse. The research aims and research questions are introduced, followed by a discussion of the marketing concept and market orientation, their relevance to not-for-profit organisations and the identified gap in the literature. A brief discussion of the organisational change necessary to successfully introduce marketing discourse is provided. An overview of the research methodology utilised in the thesis research is outlined, along with the contributions offered by the thesis. The chapter concludes by indicating the structure of the subsequent chapters.

An outline of this chapter is contained in Figure 1.1 overleaf.

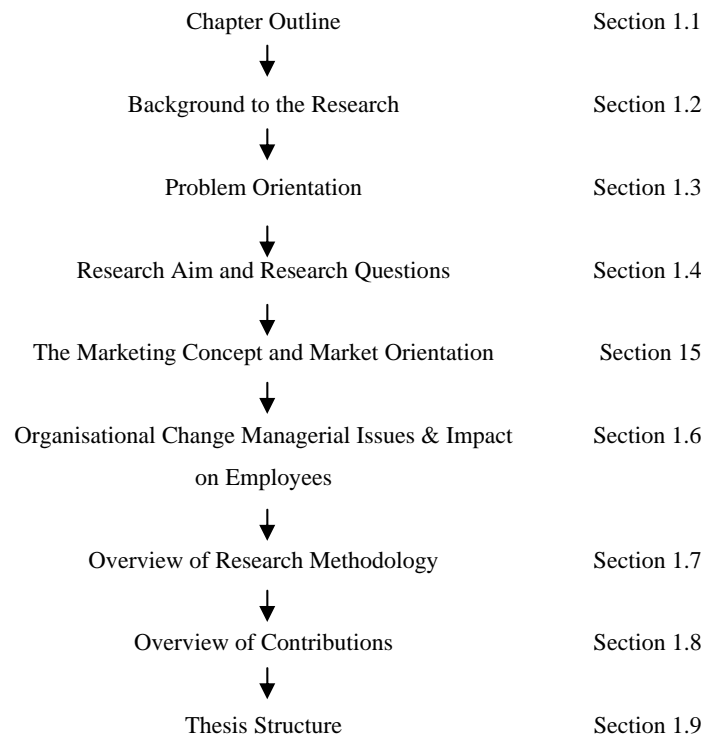


Figure 1.1 - *Outline of Chapter 1.*

1.2 Background to the Research

As indicated above, this thesis examines the introduction of marketing discourse into three Australian charity organisations. Charities are a subset of the not-for profit sector, thus it is appropriate to firstly define the nature of not-for-profit organisations and to highlight the size and importance of the sector, then define and explore the significance of charities within Australia.

1.2.1 Not-For-Profit Organisations

Sargeant defines not-for-profit organisations as operating ‘to provide the general betterment of society, through marshalling of appropriate resources and/or the provision of physical goods and services’ (2005, p. 7) and to sensitively serve ‘the needs of society’ (1999, p. 7). This definition typifies the academic definitions of not-for-profit organisations. In contrast to academic definitions, a more formal definition has been developed by the United Nations which defines ‘non-profit institutions’ as ‘legal or social entities created for the purpose of producing goods and services whose status does not permit them to be a source of income, profit or other financial gain for the units that establish, control or finance them’ (United Nations 2006, para 4.54). This United Nations definition forms the basis of definitions utilised in Australia at both National and State levels (Australian Bureau of Statistics 2002; Australian Taxation Office 2005; New South Wales Government n.d.). Not-for-profit institutions are further distinguished as to whether they primarily benefit the members of the organisation or are created for philanthropic purposes to benefit a third party, this second type consists of charities and relief/aid agencies (United Nations 2006, paras 4.65-4.67). It should be noted that the terms ‘not-for-profit’ and ‘non-profit’ are used synonymously within the literature.

Lyons, as cited by the Australian Bureau of Statistics (2006) considers not-for-profit organisations have four main characteristics: they are organisations with a set of rules or constitution; they are private and not directly subject to government control; they do not distribute any surplus to members; and finally, they rely on some component of voluntary labour. This perspective strictly excludes government

hospitals and universities although various researchers do include these organisations/institutions as not-for-profit organisations.

Not-for-profit organisations operate in various areas of society including charities, arts, education, politics, religion, research, sports, community child care, cultural societies, environmental protection, museums, libraries and service clubs (Australian Taxation Office 2005). An 'International Classification of Non Profit Organisations' (ICNPO) tries to classify organisations based on the activity in which the organisation is engaged such as culture (e.g. museums, zoos), health (e.g. hospitals), environment (e.g. animal welfare), education (e.g. technical schools), philanthropic (e.g. fund-raising) and business associations. This can however cause confusion for organisations that operate across a range of activities. For example, many organisations are involved in fund-raising, but do so to assist the operation of their primary activity that may be health education or social welfare.

Not-for-profit organisations play a key role not just within society, but also within the overall economy. In an Australian setting, the not-for-profit sector is 'the eighth largest sector of the economy' (Nonprofit Australia n.d.) and contributes \$43 billion annually to the Gross Domestic Product with average annual growth of 7.7% from 1999 to 2007. Published estimates of the number of not-for-profit associations registered in Australia varies from over 100,000 (Date 2007), to over 320,000 (Philanthropy Australia n.d.) to 'around 600 000' (Productivity Commission 2010, p. 53).

Whilst the sector plays a key role within society, in Australia 'much of the sector is still operating in a survival framework ...' (Nonprofit Australia 2006) and is neither ready 'nor able to meet the challenges of the 21st century without major transformation ...' (Nonprofit Australia n.d.). Likewise, Peter Holdsworth, head of

Pathways Australia (which provides management support to the Australian not-for-profit sector) considers that not-for-profit organisations ‘that are run along business lines will continue to grow and many of those that aren’t will disappear’ (cited by Date 2007, p. 27).

Given the large size of the sector within Australia, this research into issues affecting the sector provides an opportunity to make a valuable contribution regarding how one of the largest sectors of the Australian economy can advance in the current environment.

1.2.2 Charities in Australia

Charities are a subset of the not-for-profit sector and are the specific area examined in this thesis. The Australian Government’s Department of Families, Community Services and Indigenous Affairs (n.d.) states that a :

charity is an entity established for altruistic purposes that common law regards as charitable. Charitable purposes are the relief of poverty, the relief of the needs of the aged, the relief of sickness or distress, the advancement of religion, the advancement of education and other purposes beneficial to the community (or section of the community).

The typical characteristics of a charity organisation are that it is an entity that is also a trust fund or an institution, it exists for the public benefit, its purposes are charitable within the legal sense of that term and that it is a not-for-profit organisation.

The traditional charity discourse originated in Western society during the 1800’s from ‘middle class philanthropy which was a feature of the Victorian Age’ (Fulcher 1989, p. 28) and it is characterised by notions of people needing help, being

objects of pity, tragic, low achievers, dependent on others, and victims of circumstance. This discourse has been utilised by charity organisations to ‘mobilise a spirit of generosity among people’ (Brown R 1997, p. 168) by appealing to the social conscience of the community in order to provide services for afflicted people.

Charities typically have two types of customers/clients – ‘donor clients’ and ‘service recipient clients’. Donor clients provide the funds to enable charities to provide services usually free of charge to the service recipient clients. These two types of clients have differing needs. For clarity throughout this thesis, clients of charities will thus be referred to as either ‘donor clients’ or ‘service recipient clients’. The charity sector is becoming increasingly competitive (Murray & Carter 2005) and organisations are becoming more businesslike in an effort to survive (Jones R 2010; Polonsky 2003; Polonsky & Grau 2008). The increased competition is partly due to an increase in the number of causes being promoted (hence competition for funds from donor clients) and the desire of many existing organisations to grow and offer an increasing range of assistance to their service recipient clients (Cantrell 2005; Murray & Carter 2005). Donor clients generally have a limited pool of resources (Philanthropy Australia n.d.; Cantrell 2005). The charities generally rely heavily upon donations from donor clients as well as other fund-raising activities. Economic conditions including increases in the cost of living affect discretionary spending by individuals and thus impact on their ability to donate to charities. This is especially significant at present with the current ‘global economic crisis’.

Whilst no data was available solely in relation to charities, Australian individuals give approximately \$5.7 billion annually to not-for-profit organisations (including charities) and 41% of adults volunteer an average of 132 hours annually (Department of Families, Community Services & Indigenous Affairs 2005).

Australian businesses give \$3.3 billion annually to not-for-profit organisations made up of donations (58%), sponsorship (25%) and community projects (17%) (Department of Families, Community Services & Indigenous Affairs 2005).

As well as funding, availability of non-financial resources such as appropriately qualified staff (including volunteers) is also a significant resource constraint for many charities. Charities are therefore often challenged in their ability to provide appropriate assistance to service recipient clients due to lack of funds and service delivery capability issues. Thus, charities provide a vital service to the welfare of Australians but face a range of challenges to operate successfully. This thesis aims to offer insights that will assist charities to improve performance into the future.

1.3 Problem Orientation

As indicated above, charities are a significant component of society. The increasing competition amongst charities has placed growing pressure on charities to improve performance, not only to assist their service recipient clients with a greater range of services, but also to gain donations from a limited pool of existing and potential donor clients (Cantrell 2005; Connors 2009; Duque-Zuluaga & Schneider 2008; Kinnell & MacDougall 1997; Murray & Carter 2005). A market orientation, which typically involves emphasis on customer, importance of information, interfunctional coordination and taking action (Lafferty & Hult 2001) has been shown to assist commercial organisations to improve performance in terms of profitability and growth (Kohli & Jaworski 1990; Narver & Slater 1990). Theoretically, the introduction of market orientation may thus enable charity organisations to improve

organisational performance against the increasing competition. However, as with most organisational change, the introduction of a market orientation into a charity organisation may result in significant challenges and changes to the traditional discourse operating within the charity.

This thesis examines the views and experiences in the change management process within three Australian charity organisations that have undergone management action to change towards a marketing discourse.

1.3.1 A Discourse Perspective to Organisational Change

The rationale for using a discourse perspective in this thesis is that it provides an appropriate theoretical lens through which to examine how the three charities have changed, what the change meant and how it was perceived and experienced by the employees. In essence, this thesis examines a fundamental change in what ‘charities’ mean and the impact on associated practices when two states of meaning meet from a participant’s perspective. As indicated by Jorgenson (2002, p. 358) ‘individuals claim identities by taking up positions in discourses and once having taken up a particular position, seeing the world from and speaking from the vantage point of that position’.

Foucault (1972a, p. 49) regarded discourse as ‘practices that systematically form the objects of which they speak’, thus, discourse is a system of statements that constitute objects and subjects. Reality is therefore ‘produced and made real through discourses and social interactions cannot be fully understood without reference to the discourses that give them meaning’ (Phillips & Hardy 2002, p. 3). Discourse, then, constitutes how we understand and make sense of our realities. Thus, ‘[d]iscourses create the ideas, categories, relationships and theories through which actors understand the world and relate to one another’ (Grant & Hardy 2004, as cited in

Maguire & Hardy 2006, p. 9). Discourses have a constitutive nature and influence systems of thought and the development of meaning.

The study of organisational discourse enables us to understand how, via discourse, people accomplish the everyday tasks of functioning in an organisation (Mumby & Clair 1997). Organisations only exist because their members create the organisation via discourse and 'discourse is the principal means by which organisation members create a coherent social reality that frames their sense of who they are' (Mumby & Clair 1997, p. 181). It is possible for organisations to achieve change via strategic discourse transformations that aim to institutionalise new meaning. Thus, this thesis examines the introduction of a marketing discourse within three Australian charity case studies.

1.4 Research Aim and Research Questions

Market orientation draws its origins from the marketing concept. Extensive research has been devoted to the topic of the marketing concept (e.g. Drucker 1954; Hooley *et al.* 1990; Levitt 1960) and its delivery via a market orientation (e.g. Deshpande & Farley 1998a; Kohli & Jaworski 1990; Lafferty & Hult 2001; Narver & Slater 1990). Understanding the development of market orientation dimensions has been complemented by a large body of literature developed around issues relating to the genres of services marketing, particularly delivery and quality (e.g. Lovelock *et al.* 2004; McColl-Kennedy 2003; Parasuraman *et al.* 1985; Zeithaml & Bitner 2003). Relationship marketing research has also assisted development of market orientation. The research has, however, tended to concentrate on the use of market orientation

within a for-profit environment and gives a relatively fragmented and emergent consideration to market orientation from a not-for-profit sector perspective.

Whilst fragmented and emergent research regarding use of market orientation within a not-for-profit context exists, a thorough review of the not-for-profit literature has identified a significant gap in our knowledge, namely there is a distinct *lack of research regarding the introduction of a market orientation within not-for-profit organisations*. This is an academically under-developed topic area that offers potential research contribution to theory and practice and supports comments from various academics including Warnaby and Finney (2005, p. 185) who suggest that relative to research on profit oriented organisations, ‘not-for-profit organisations have been somewhat neglected by comparison’. Similarly, in regards to issues of market orientation and factors such as performance ‘the non-profit sector has only recently attracted attention from researchers ...’ (Barrett *et al.* 2005a, p. 214) and research into the marketing of charities ‘to actual or potential beneficiaries has been sparse’ (Bennett 2005, p. 453) with ‘only a limited amount of extant research focusing on market orientation and nonprofits ...’ (Sargeant *et al.* 2002, p. 42). Research in this area will not only fill gaps in the academic literature, but also address issues of concern to managers of charities in the current environment of increasing competition.

The aims of this research are to -

1. *Examine the process of introducing and legitimising a marketing discourse into charity organisations.*
2. *Develop a conceptual best practice framework to guide charities.*

Questions linked to these aims are -

1. *How do charity organisations implement a discourse transformation?*
2. *What dimensions of a marketing discourse are adopted by charity organisations?*
3. *How does the management of charity organisations legitimise adoption of a marketing discourse amongst employees?*

1.5 The Marketing Concept and Market Orientation

In support of the accepted convention, this thesis argues that introduction of marketing into charities will assist the improvement of operational performance. The marketing concept and market orientation are thus discussed in this section prior to discussion of the relevance of marketing to not-for-profit organisations including charities in Section 1.5.1, leading to identification of current research gaps in Section 1.5.2.

Formulation of the marketing concept originated ‘in the 1950s in the context of business firms’ (Mukkerji 2004, p. 9). In seminal works, the marketing concept has long been suggested as the main way for organisations to create satisfied customers and should be the primary objective of organisations (Drucker 1954, p. iv; Levitt 1960). Kohli and Jaworski (1990) regard the marketing concept as a *business philosophy*, whereas *market orientation* is regarded as the *actual implementation* of the marketing concept. That is, ‘a market-oriented organisation is one whose actions are consistent with the marketing concept’ (Kohli & Jaworski 1990, p. 1).

Whilst various researchers have proposed arguably differing perspectives on what constitutes a market orientation (e.g. Deshpande *et al.* 1993; Kohli & Jaworski 1990; Narver & Slater 1990; Ruekert 1992; Shapiro 1988), a meta-analysis of available research conducted by Lafferty and Hult (2001) concluded that four key ‘synthesis dimensions’ of market orientation exist: emphasis on customer, importance of information, interfunctional coordination and taking action. (See Figure 1.2 below).

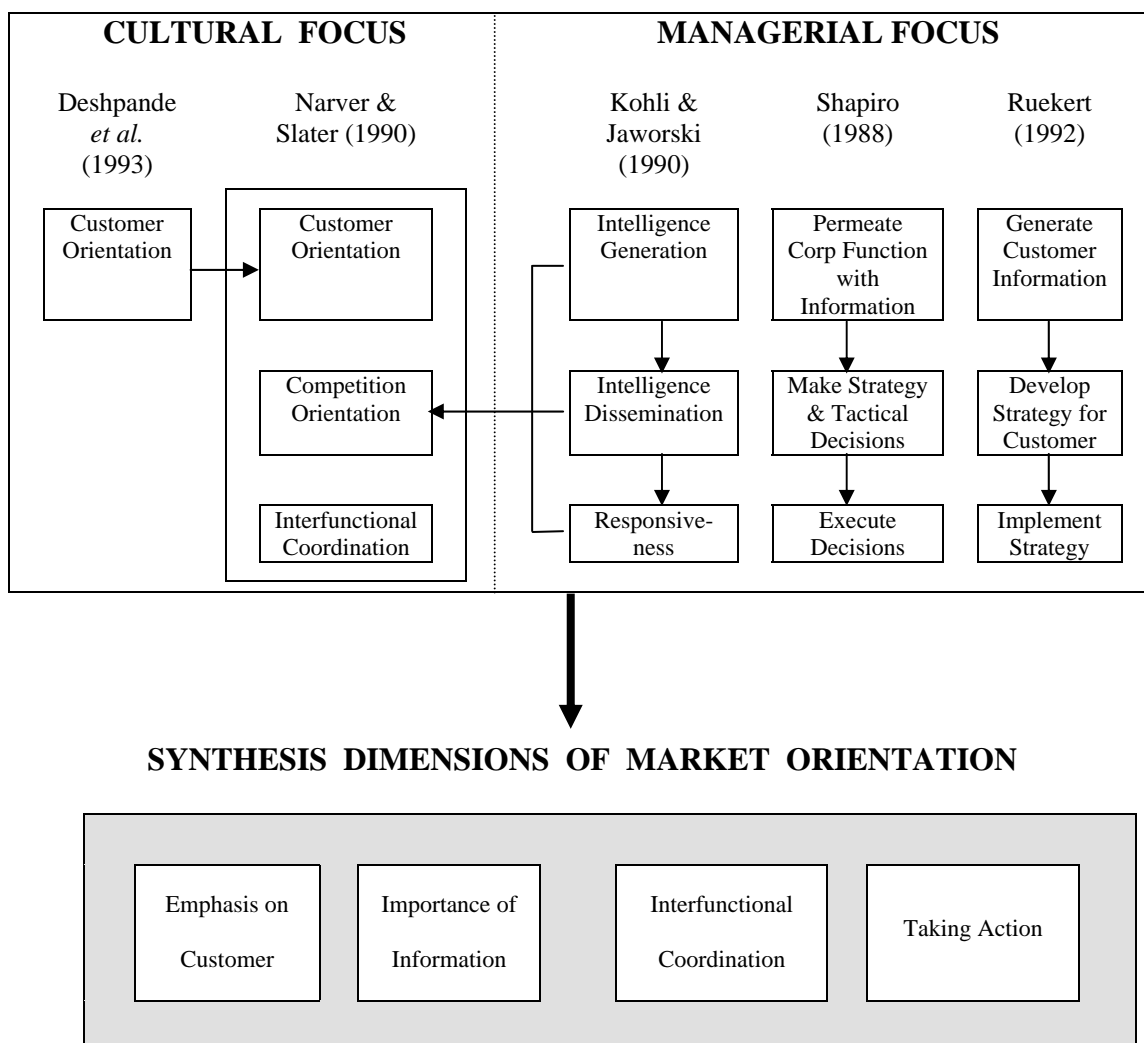


Figure 1.2 - *Synthesis Dimensions of Market Orientation* (Lafferty & Hult 2001, p. 100).

Research relating to market orientation has tended to develop as an operationalisation of the marketing concept (Steinman *et al.* 2000) and significant research evidence suggests that a high level of *market orientation* is associated with a high level of *business performance* in commercial *for-profit* organisations. These principles were initially developed in the context of for-profit organisations, with less consideration given to their relevance within not-for-profit organisations. The unique characteristics of not-for-profit organisations thus offer opportunities for examination of the nature of market orientation within a not-for-profit context.

For the purpose of this thesis, the marketing concept will be regarded as being operationalised via implementation of a market orientation in keeping with Kohli and Jaworski (1990). A market orientation will thus be regarded as comprising the four key synthesis dimensions reported by Lafferty and Hult (2001). Consequently, a ‘marketing discourse’ will thus be understood as being a system of meaning that communicates the marketing concept via the four key synthesis dimensions of market orientation.

1.5.1 Relevance of Marketing for Not-For-Profit & Charity Organisations

Bennett (2005, p. 453) states that ‘certain competitive factors known to drive conduct in the commercial domain also affected the behaviour of many ... charities’. There is extensive research suggesting that marketing is relevant for not-for-profit organisations (e.g. Barrett *et al.* 2005b; Kara *et al.* 2004; Wood *et al.* 2000). Application of marketing to the not-for-profit arena was originally postulated from the late 1960’s in pioneering articles by Kotler and Levy (1969), Kotler and Zaltman (1971) and Shapiro (1973). For example, Kotler and Levy (1969, p. 15) consider that

‘no organisation can avoid marketing. The choice is whether to do it well or poorly....’ Lovelock and Weinberg, as cited by Denney (1999, p. 154) consider ‘the debate first started by Kotler and Levy has been resolved in favour of introducing and extending marketing techniques into nonprofit-making organisations’. A word of caution, however, is offered by Rothschild (1979, p. 11) who contends that ‘transference of marketing principles from the business sector to the non-business sector is far more complex than had been thought’. More recently, Conway (1996, p. 130) has stated that ‘marketing is equally important for organisations pursuing motives other than profits’ and Lovelock, Patterson and Walker (2004) consider a business trend is for more not-for-profit organisations to turn to marketing. The concept of ‘markets’ has thus been extended into new areas of social life (Urry 1987) with Fairclough (1995a, p. 149) subsequently defining marketisation as ‘the extension of market models to new spheres’ not previously regarded as appropriate for use of marketing language.

Following an investigation into disability charities in the UK, Connor (1999, p. 342) considers it is ‘critical that disability charities become market orientated if they are to prosper in the future’. Similarly, it is claimed by Gonzalez, Vijande and Casielles (2002) that many not-for-profit organisations are product oriented and campaign oriented and thus need to become market oriented. This thesis extends on these issues and assesses how, and in what format, a market orientation has, or can, be introduced into charity organisations.

Market orientation is particularly suited in a competitive marketplace. Drawing upon Rosenbaum’s (1984) contention that not-for-profit organisations have progressed through four stages within US society - from voluntary (willingness to share), to philanthropic patronage (generosity of the wealthy), to rights and

entitlements (largess of governments and foundations) and then to a competitive stage - Andreasen and Kotler (2003, p. 11) conclude 'the greatest challenges facing nonprofit managers are *competitive* challenges. This means that marketing and marketing skills inevitably must play a more central role'. Similarly and recently, Kotler and Lee (2009) contend that a strategic marketing mind-set should be utilised by various not-for-profit organisations.

Thus, the consensus amongst researchers is that market orientation is relevant to the not-for-profit sector – in some form or another. Specifically in relation to charities, Kinnell and MacDougall (1997, p. 141) consider that charities 'operate in a tough, commercial and competitive world and need to adopt efficient management and marketing practices in order to survive'. Some charities do not recognise the importance of marketing, and having a good cause is no guarantee of success. Numerous charitable causes fight for the attention of the public in relation to revenue generation and, like any organisation, must have 'something specific to retain ... attention and gain support' (Kinnell & MacDougall 1997, p. 141). Without mentioning the word 'marketing' Dart (2004) suggests not-for-profit organisations have been pressured to become more 'businesslike'. Various not-for-profit organisations misunderstand the exact nature of marketing and often incorrectly consider marketing to consist simply of the occasional promotion (Kolb 2008) or advertising and selling (Brady & Johnson 1999). Seymour, Gilbert and Kolsaker (2006, p. 151) contend that only recently has the issue of market orientation 'attracted the interest of charities who, facing increasing competition and environmental complexity, are seeking differentiation and competitive advantage'.

Thus, not only is marketing relevant for the not-for-profit sector, but the sector lags in its introduction and usage. The increasing competition within the sector makes an introduction of marketing practices an imperative sooner rather than later.

1.5.2 Market Orientation, Not-For-Profit & Charity Organisations – Research Gap

Whilst various frameworks exist to assist, explain and guide for-profit organisations to deliver a strong market orientation (and thus a high-level business performance for the organisation), only limited efforts have been made by researchers to develop an appropriate market orientation framework suitable for not-for-profit organisations (e.g. Gonzalez *et al.* 2002; Liao *et al.* 2001; Sargeant 2001; Sargeant *et al.* 2002). Indeed, these attempts can be considered somewhat broad and attempt to cover the entire not-for-profit sector (from charities, to hospitals, to art groups, to political parties, to libraries, to universities etc.).

Apart from these broad frameworks, most research in the not-for-profit sector has focussed on measurement of the apparent linkage between market orientation and performance with little substantive research into how to actually introduce a for-profit marketing discourse into these organisations in an attempt to improve service delivery and quality. The existing research in the not-for-profit sector relating to linkage of market orientation and performance has covered a diverse range of not-for-profit settings, for example, from a broad not-for-profit setting (e.g. Gainer & Padanyi 2005) to specific, but diverse not-for-profit settings such as charities (e.g. Balabanis *et al.* 1997; Bennett 1998a, 2005; Bennett & Sargeant 2005; Seymour *et al.* 2006), hospitals (e.g. Naidu & Narayana 1991; Wood *et al.* 2000), museums (e.g. Mottner & Ford 2005), libraries (e.g. Harrison & Shaw 2004; Warnaby & Finney 2005), arts and

culture (e.g. Gainer & Padanyi 2002) and even political parties (e.g. O'Cass 1996, 2001).

In short, existing research regarding market orientation within the not-for-profit sector and its sub-sectors has concentrated on simply measuring levels of market orientation relative to performance, or postulating on appropriate market orientation frameworks. No research to date has actually examined the dynamic change over time within a not-for-profit organisation, or the affect upon employees as a market orientation is introduced. To fill this gap, this thesis therefore concentrates on examining the introduction of a for-profit marketing discourse into a charity discourse and analysis of the resultant discourse transformation. The not-for-profit sector overall is regarded as too broad for analysis, hence the charity sub-sector has been selected to tighten focus and also because of the perceived significantly important role of charities within society.

The thesis draws upon existing market orientation frameworks and definitions from the commercial for-profit literature to analyse how charities have introduced market orientation to achieve their goals. For this thesis, the synthesis dimensions of market orientation as determined by Lafferty and Hult (2001) have been chosen to summarise the various existing for-profit frameworks and definitions. Lafferty and Hult's synthesis has been selected as it was based on extensive meta-analysis of existing seminal research regarding market orientation. Thus, the four fundamental principles of for-profit market orientation (Lafferty & Hult 2001, p. 100) utilised within this thesis are -

1. Customer needs
2. Information generation
3. Inter-functional issues
4. Taking action

In summary, extant literature does not at present offer context specific guidelines regarding how charities have, or could, adapt aspects of a market orientation that was originally developed in the for-profit sector. It is not possible for charities to simply utilise the for-profit frameworks as there are ‘critical differences between the two’ sectors and managers ‘all too often ... underestimate the unique challenges of managing nonprofit organizations’ (Silverman & Taliento 2006, p. 37).

This thesis thus focuses on this under-researched, but important area of examining how a for-profit marketing discourse can be assimilated into the existing not-for-profit charity discourse to enable not-for-profit charities to achieve improved performance in the increasingly competitive market-place. The thesis utilises a charity employee lens and as such, key aspects examined are the potential challenges for, and resistance of employees to introduction of the new discourse. Relative to existing research, examining the *change* within a charity as a market orientation is introduced (rather than a static situation) is considered unique, as is examination via a discourse perspective. Examination of the change will include analysis of management’s change processes and will thus offer further insight to assist management of charities to introduce smooth change processes in the future.

1.6 Organisational Change Managerial Issues & Impact on Employees

This thesis examines organisational change within a charity setting by examining the introduction and legitimisation of marketing discourse. Organisational change can be defined as ‘new ways of organizing and working’ (Andriopoulos & Dawson 2009, p. 15) and involves ‘movement over time from a present state of organization to some future state’ (Dawson 2001, p. 10921). There is debate amongst researchers as to whether change involves ‘a logical sequence of events which can be planned or whether ... change unfolds in unpredictable ways’ (Dawson 2001, p. 10921). Factors promoting change can be either external or internal (Palmer *et al.* 2006) and the subsequent change can be regarded as either proactive or reactive, as well as either small scale or large scale (Dawson 2003, 2008). The managerial trigger for change in charities is the changing environment in which charities operate, in particular the increased level of competition. A discourse transformation, in other words, organisational change, can be considered to have occurred if participants understand or ‘know’ the world differently and act differently than they did previously (Hardy *et al.* 1998). This thesis seeks to ultimately develop a framework that can be employed by managers of charities to plan and implement change via a discourse transformation from a traditional charity discourse to a marketing discourse.

1.7 Overview of Research Methodology

As indicated above, the aims of this research are to ‘*examine the process of introducing and legitimising a marketing discourse into charity organisations*’ and subsequently ‘*develop a conceptual best practice framework to guide charities*’.

Via multiple case studies, the research assesses three Australian charities in which management has aimed to introduce a market orientation in recent years. Cases were selected on the basis that management had commenced an attempt to introduce market orientation; the level of success of implementation was not a consideration nor was it known at the time the cases were selected. Following in-depth interviews of management and employees within the charities, thematic analysis of the interview transcripts and other artefacts was conducted drawing upon Foucault’s (1991, pp. 56-57) approach to identifying the changes that affect discursive formations to enable detection of discourse transformation. Utilisation of the framework developed by Foucault (1991, pp. 56-57) enabled a systematic examination of the change in discourse within each charity via consideration of: the displacement of discourse boundaries; the new position and role occupied by employees within the new discourse; the new mode of functioning of language; and the manner in which the new discourse was circulated.

A range of employees within each charity was interviewed to cover all levels of each organisation (vertical) as well as all functional areas (horizontal) within each organisation. A total of forty employees were interviewed (15 employees within each of two charities, and 10 employees within a third charity). No further interviews were considered necessary, as saturation (Yin 1984) had occurred within each charity. In

keeping with appropriate multiple case study research (Eisenhardt 1989; Stake 1995; Yin 1984), both in-case and cross-case analysis was conducted.

1.8 Overview of Contributions

Relative to the for-profit sector, research into market orientation within not-for-profit organisations including charities is an under-researched area (Bennett 2005; Sargeant *et al.* 2002; Warnaby & Finney 2005) and the research in this thesis fills current gaps. Based on the analysis of the experiences of employees in three Australian charity organisations, this study presents, for the first time, an examination of the change within an organisation as management attempt to introduce some form of market orientation.

This has resulted in the development of a conceptual best practice framework (Table 9.1) for the management of change within charities as they try to improve organisational performance. Whilst various literature suggests a market orientation is relevant for charity organisations, research in this thesis shows introduction of market orientation is not straight-forward. A key finding is that charities must firstly become more businesslike (via new managerialism) and professional prior to attempting to increase market orientation. Secondly, management of the charity must choose the specific form of market orientation that can be successfully legitimised within the organisation, and select appropriate strategies to enable the legitimisation. What can be legitimised is typically based around the legacy discourse (i.e. remnants of the previous culture that remain in the new discourse), thus different charities are likely to acquire differing perspectives of market orientation. The results show three

contrasting case studies of how change was introduced and the type of change. The resultant conceptual best practice framework provides a recommended normative approach. This has serious implications for not-for-profit managers as they aim to transition employees into a new discourse. A conceptual best practice framework can assist management to avoid potential pitfalls that can result in tension and disruption within the organisation and possible loss of a wealth of knowledge and experience if employees leave the organisation due to dis-satisfaction with the new discourse.

The thesis thus provides a significant contribution to filling gaps in academic knowledge as well as contributing to advancement of managerial practice.

1.9 Thesis Structure

Chapter One contains an introduction and background to the research and outlines the conceptual foundations of the study.

Chapter Two provides a review of the relevant literature. Commencing with a review of the market orientation literature, a major objective is to provide background for this study by identifying characteristics of market orientation and highlight current gaps in existing market orientation knowledge, especially those relating to development of market orientation within not-for-profit organisations. Consistent with the view that marketing is developing a service-dominant logic (Vargo & Lusch 2004a) and provides a vital tool to develop a market orientation, the chapter also briefly overviews the services marketing literature. This review of market orientation assists in providing insights that will inform the investigation of the introduction of a marketing discourse into a charity discourse in this thesis.

Chapter Three provides an overview of discourse and identifies and explains its main tenets. In particular, discourse production, transformation and the related aspects of power and resistance are examined. The chapter also provides a review of the literature regarding justification for using marketing within not-for-profit organisations as well as summarising the differences and similarities between for-profit and not-for-profit organisational discourse. The chapter thus provides background theory to assist the thematic analysis of the discourse transformation in this thesis.

Chapter Four presents the research design used in this study. Justification of case study methodology to build and refine theory, and the control of quality during data collection and analysis are emphasised. Detail regarding the actual data collection and thematic analysis employed in the research concludes the chapter.

Chapters Five, Six and Seven respectively present the results of the research for each of the three case study organisations, referred to as Arana, Bukari, and Camira for confidentiality. In these chapters the qualitative responses provided by employees, plus other relevant artefacts (e.g. annual reports) are analysed using thematic analysis structured on the discourse transformation framework offered by Foucault (1991, pp. 56-57). Chapter Eight subsequently contains a cross-case analysis.

Chapter Nine presents development of the conceptual best practice framework, followed by overall conclusions. Limitations of the research findings are then mentioned and the academic and managerial contributions highlighted. Implications for further research are also addressed.

CHAPTER TWO : REVIEW OF THE LITERATURE

2.1 Chapter Outline

The purpose of this chapter is to provide a context for examining the introduction of a for-profit market orientation into a not-for-profit setting. Based on extensive review of the literature, the marketing concept and its relevance to marketing success are detailed to examine the theoretical and empirical research relating to market orientation (which is regarded as the means of operationalising the marketing concept). Gaps in market orientation literature are assessed and provide justification for the direction of this thesis. A key gap identified in the limited and fragmented literature regarding market orientation within the not-for-profit sector is that no previous research has examined the *change process* within an organisation when a marketing discourse is introduced into an organisation. This identified gap, plus a consideration that an examination of the entire not-for-profit sector is too broad, has resulted in the specific aim of this research to examine *change within a charity* when a market orientation is introduced. Given that charities traditionally offer a service, and in keeping with the suggestion that marketing is developing a service dominant logic (Vargo & Lusch 2004a) and is thus vital in assisting development of a market orientation, the services marketing literature is briefly reviewed to inform compilation of issues that may be relevant to examine during the field work. For example, quality, and how charities attempt to ensure quality service

delivery to assist introduction of market orientation. The chapter finishes with a summary and highlights the key knowledge gaps identified in the review of literature.

An outline of the chapter is contained in Figure 2.1 below.

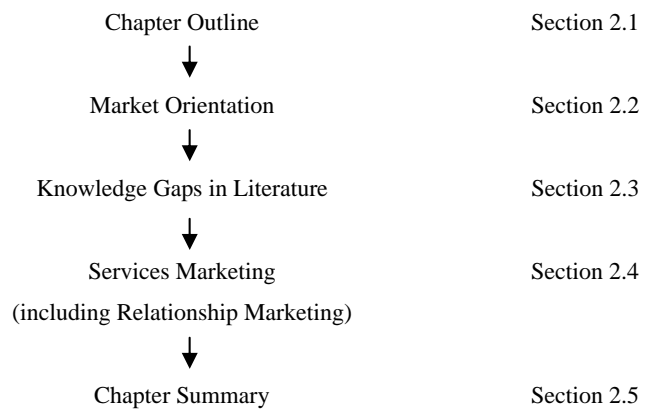


Figure 2.1 - *Outline of Chapter 2.*

2.2 Market Orientation

2.2.1 The Marketing Concept and Market Orientation

The marketing concept and market orientation are key aspects examined in this thesis hence it is appropriate to review existing research concerning these issues. It should be noted that the majority of prior research regarding the marketing concept and market orientation was developed in the context of for-profit organisations with little consideration having been given to not-for-profit organisations.

The marketing concept is defined by Kotler, Brown, Adam and Armstrong (2004, p. 919) as the ‘marketing management philosophy which holds that achieving

organisational goals depends on determining the needs and wants of target markets and delivering the desired satisfactions more effectively and efficiently than competitors'. The marketing concept was initially developed 'in the 1950s in the context of business firms' (Mukkerji 2004, p. 9) and in seminal works, the marketing concept has long been suggested as the main way for organisations to create satisfied customers and, as such, should be the primary objective of organisations (Drucker 1954, p. iv; Levitt 1960). Kohli and Jaworski (1990) regard the marketing concept as a *business philosophy*, whereas market orientation is regarded as the practice of *actual implementation* of the marketing concept. That is, 'a market-oriented organisation is one whose actions are consistent with the marketing concept' (Kohli & Jaworski 1990, p.1). Similarly, Van Egeren and O'Connor (1998, p. 40) state that 'market orientation is a strategy', whilst Gainer and Padanyi (2005, p. 855) consider 'market orientation is the means by which the theoretical marketing concept is implemented'.

Research relating to market orientation has tended to develop as an operationalisation of the marketing concept (Steinman *et al.* 2000), with adoption of market orientation often being regarded as a significant predictor of organisational performance and to assist with long-term success in for-profit organisations . In a meta-analysis covering fifteen years of published research, it was concluded that market orientation has a significant impact (directly, indirectly and totally) on performance (Shoham *et al.* 2005). However, there has also been some contradictory evidence offered by Caruana, Pitt and Berthon (1999) and Langerak (2003) who suggest the linkage is questionable in various circumstances. A key issue in measuring business performance is the selection of measures, with a range of measures, both subjective and objective being available.

There are numerous similar terms mentioned in the literature and Shapiro (1988) suggests that concepts such as ‘market-oriented’, ‘customer-oriented’, ‘market-driven’ and ‘customer-driven’ are basically the same, and are often used interchangeably by researchers with perhaps only subtle differences. Care does however need to be taken with definitions. For example, researchers have suggested a distinct difference between ‘market-driven’ and ‘market-driving’, albeit, both being approaches to market orientation. In other words, market-driven relates to a firm’s ability to learn, understand and *respond* to the marketplace (Jaworski *et al.* 2000) and be flexible (Akata & Akyol n.d.), whilst market-driving is a firm’s ability to *change a market* (Kumar *et al.* 2000), with Carrillat, Jaramillo and Locander (2004) suggesting that a human factor is the key to developing a market-driving culture. Day (1999a; 1999b) equates market orientation to being market-driven which is in-between being ‘customer compelled’ and ‘ignoring the customer’. Slater & Narver (1998) point out that a ‘customer-led’ philosophy is concerned with satisfying the expressed needs of customers (and is relatively short term in focus), whereas a ‘market orientation’ also includes latent needs of customers and is thus longer term in focus. Slater and Narver (1998, p. 1003) also emphasise that ‘market orientation is not a marketing orientation. Marketing is only a function of the business. A business is market-oriented only when the entire organisation ...’ is involved.

Hooley, Lynch and Shepherd (1990) consider that a large majority of firms fail to develop the concepts of market orientation due to different managers having differing views regarding marketing. The views included marketing being regarded as: both a function and guiding business philosophy; as basically being only sales; or as a function only and not a business philosophy.

The differing definitions and views on issues have occasionally resulted in various researchers mis-interpreting or mis-understanding the viewpoints of others, resulting in researchers writing articles to clarify potential mis-interpretations, for example Slater and Narver (1999), when aspects of their views on customer-led versus market-oriented were criticised.

Seminal definitions of market-orientation are provided in Table 2.1 below. It should be noted that all these definitions were based on research conducted in the for-profit arena.

Table 2.1 - Seminal Definitions of Market Orientation.

Definition	Authors
‘The organisation-wide <i>generation</i> of market intelligence pertaining to current and future customer needs, <i>dissemination</i> of the intelligence across the departments, and organisation-wide <i>responsiveness</i> to it’.	(Kohli & Jaworski 1990, p. 6)
The organisational culture that most effectively and efficiently creates the necessary behaviours for the creation of superior value for buyers and, thus, continues superior performance for the business.	(Narver & Slater 1990; Narver <i>et al.</i> 1998)
The level to which an organisation obtains and uses customer information, develops strategy to meet customer needs, then implements the strategy by being responsive to the needs and wants of customers.	(Ruekert 1992)
‘The set of beliefs that puts the customer’s interest first, while not excluding those of all other stakeholders such as owners, managers, and employees, in order to develop a long-term profitable enterprise’.	(Deshpande <i>et al.</i> 1993, p. 27)

These four definitions, developed in the early 1990's by different researchers tend to be the basis for contemporary market orientation definitions. Furthermore, Gounaris and Avlonitis (2001, p. 354) consider that the various definitions can be 'grouped into two main perspectives' - a philosophy-attitude perspective and a behavioural perspective. Seemingly compiling both perspectives, a more recent definition proposed by Gray and Hooley (2002, p. 981) is that market orientation is 'the implementation of a corporate culture or philosophy which encourages behaviours aimed at gathering, disseminating and responding to information on customers, competitors and the wider environment in ways that add value for shareholders, customers and other stakeholders'. Also, Narver, Slater and MacLachlan (2004) consider the concept of market orientation was previously measured too narrowly and only measured responsive market orientation based upon customers' expressed needs, and did not measure proactive market orientation that addressed customers' latent needs (of which the customer was unaware). Narver, Slater and MacLachlan (2004) thus extended the measurement of market orientation to cover both responsive and proactive market orientation.

In summary, a number of definitions of market orientation have been offered by various researchers – *all in a for-profit context, with little if any consideration given to the not-for-profit context*. The frameworks behind the often-used definitions are detailed in the following section.

2.2.2 Market Orientation Frameworks

Having examined the various broad perspectives of market orientation in the previous section, this current section provides more detail into the issues that

influence market orientation and provides background to assist in the development of the areas that need investigation when interviewing the employees in the case studies conducted for this thesis. Section 2.2.2.1 analyses frameworks developed in the for-profit arena, whilst Section 2.2.2.2 assesses the fledgling frameworks postulated for the not-for-profit arena.

2.2.2.1 For-Profit Organisations

The various definitions of market orientation as mentioned in the previous section are associated with some key frameworks. Shapiro (1988), considered market orientation to be an *organisational decision-making process* and indicates three characteristics of a market oriented organisation. Firstly, important information permeates the entire organisation. Secondly, strategic and tactical decisions are made across the organisation, and thirdly, the organisation makes well organised decisions and executes them effectively.

Given the unique differences between for-profit and not-for-profit organisations, Shapiro's perspective requires adjustment in a not-for-profit setting. For example, the often heavy reliance of not-for-profit organisations on volunteer labour (who often only work a few hours per week) is likely to have key implications for issues relating to efficiency of information transfer within the organisation.

Narver and Slater (1990) as well as Kohli & Jaworski (1990) are generally regarded as authors of seminal research into contemporary market orientation. Narver and Slater (1990) conducted an exploratory study in which they developed what is regarded as one of the first actual measures of market orientation. They developed the 'Independent Effects Model' of relationships between market orientation, business-

specific factors, market-level factors and business performance (see Figure 2.2 overleaf) and hypothesised that market orientation 'is a one dimension construct consisting of three behavioural components and two decision criteria – customer orientation, competitor orientation, interfunctional coordination, a long-term focus, and a profit objective – and that each of the five can be measured reliably with a multi-item scale' (Narver & Slater 1990, pp. 21-22). Business units within a major US organisation were assessed and given the exploratory nature of the research, generalisability of their findings is limited but various other research has since been conducted to determine the generalisability of the measure. Narver and Slater (1990, p. 34) concluded that a 'substantial market orientation must be the foundation for a business's competitive advantage strategy'. A scale was offered to measure market orientation but a potential issue with the scale is lack of weighting of the items. Developed in a for-profit context, items in the 'Independent Effects Model' such as 'seller power' are unlikely to be appropriate in not-for-profit organisations, whereas 'buyer power' would be relevant to donors.

In further research, Slater and Narver (1994a, p. 54) concluded that 'being market oriented can never be a negative'. Slater and Narver (1994b, p. 27) also considered that a 'market orientation is an externally focused business culture that makes creating superior value for buyers its top priority' and that a 'business's opportunities for success will be maximised when all organisational members recognise that they can contribute to creating buyer value and are motivated and empowered to do so. Market orientation is a culture that focuses their efforts and enables this to happen'.

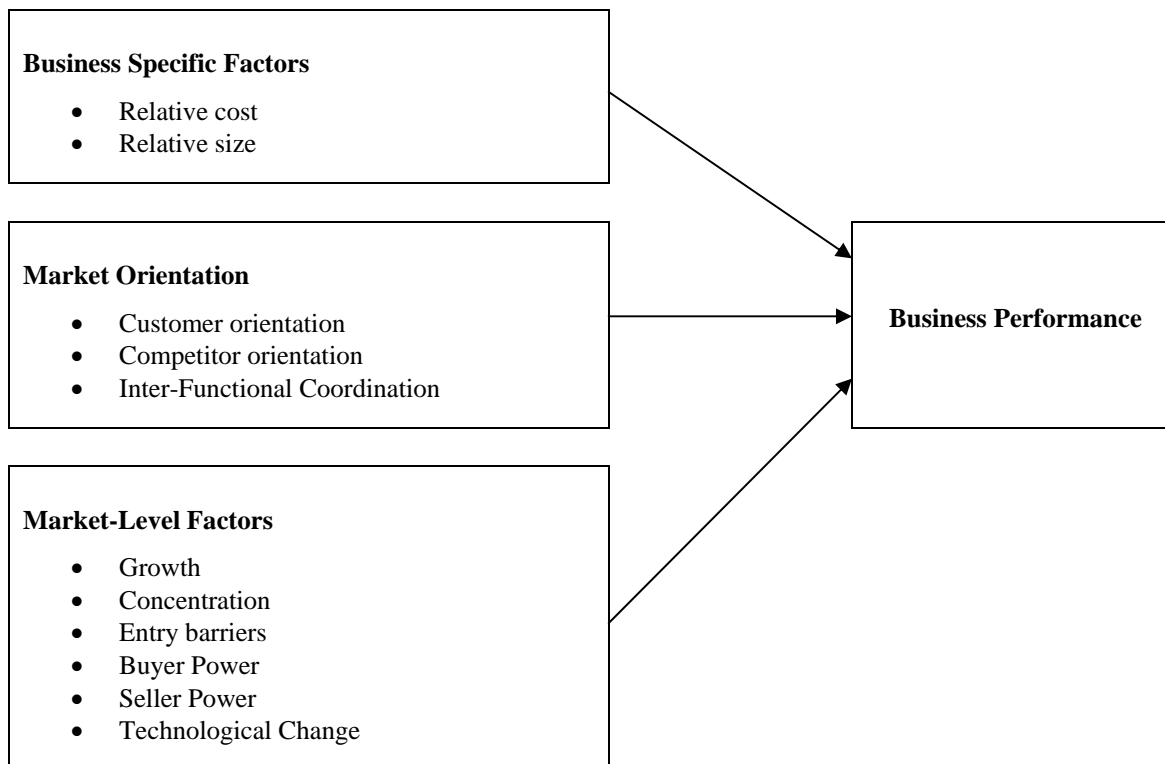


Figure 2.2 - Independent Effects Model of Relationships Between Market Orientation, Business-Specific Factors, Market-Level Factors, and Performance (Narver & Slater 1990, p. 29).

This for-profit perspective is perhaps somewhat problematic in a not-for-profit setting. Issues such as ‘creating superior value for buyers’ may be relevant to attract donor clients, but likely to be less relevant for service recipient clients. There is a potential need to modify this perspective in a not-for-profit setting – with perhaps differing perspectives required for donor clients compared with service recipient clients.

In parallel to the Narver and Slater (1990) research, Kohli and Jaworski (1990) developed their definition of market orientation based on market intelligence requiring three components, namely - intelligence generation, intelligence dissemination and responsiveness. Later, Jaworski and Kohli (1993) developed a framework whereby top management characteristics, interdepartmental dynamics and organisational systems were believed to affect the level of market orientation, and

that market orientation subsequently affected the organisation's employees and business performance (see Figure 2.3 below). Further research elaborated on the forms of intelligence generation (Slater & Narver 2000).

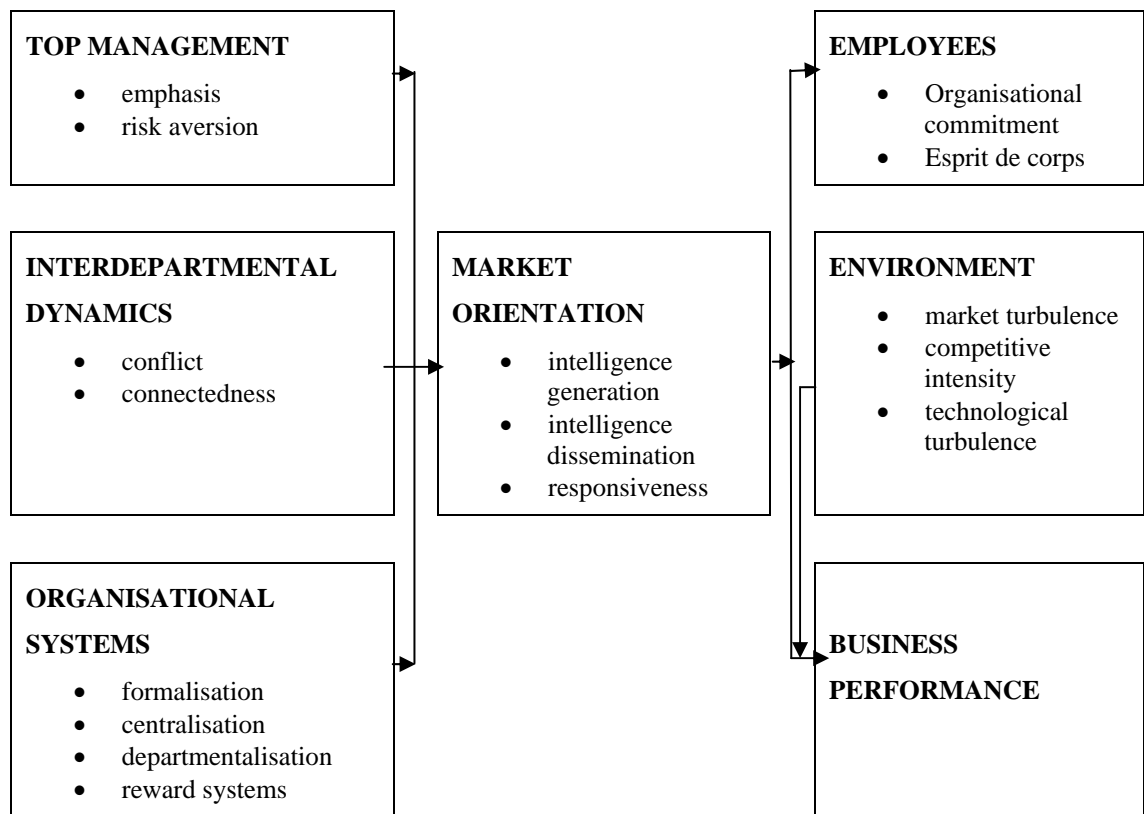


Figure 2.3 - *Antecedents and Consequences of a Market Orientation* (Jaworski & Kohli 1993, p. 55).

The five key conclusions of their research (see Table 2.2 overleaf) can be regarded as crucial to market orientation and its consequential delivery via a marketing discourse. To measure the level of market orientation within an organisation, the authors developed a scale that focused on the activities that need to take place for the organisation to be market oriented. The scale was subsequently refined and reduced in size to a twenty item measure named 'MARKOR' – a measure of market orientation (Kohli *et al.* 1993).

Table 2.2 - Factors Affecting Delivery of Market Orientation (Jaworski & Kohli 1993).

1	Connectedness amongst departments assists market orientation
2	Employee rewards based upon customer satisfaction assisted market orientation
3	Centralisation is a barrier to market orientation
4	Formalisation does not affect market orientation
5	Market orientation is related to business performance regardless of market turbulence, competitive intensity or technological turbulence

Harris (1996a) critically assessed the Jaworski and Kohli (1993) model and commended the model as being ‘of major theoretical and practical use’ (p. 29) and for being appropriate ‘whatever the market turbulence, competitive intensity or technological turbulence’ (p. 27). However, Harris (1996a) does also consider there to be flaws in the model, including a ‘failure to produce a definitive model. A hypothesised model is produced but the actual complexities of the findings are not represented, a definition of market orientation which ignores customers!’ (pp. 27-28), three defined antecedents are used (Harris suggests that there should be more), and the practicalities of moving information through the system are not examined.

Greenley (1995) considered most studies into market orientation have concentrated on overall level of orientation (treating each component equally) and suggested five modes of market orientation – customer focus, undeveloped market orientation, fragmented orientation, comprehensive and also competitor focus. Along similar lines, Mason & Harris (2006) have suggested eight possible emphases, whilst Heiens (2000) simply proposes a customer versus competitor focus.

Lafferty and Hult (2001) offer a comprehensive synthesis of contemporary market orientation perspectives and developed a conceptual framework that integrates the often quoted seminal perspectives. Comparing the decision-making perspective (Shapiro 1988), market intelligence perspective (Kohli & Jaworski 1990), culturally

based behavioural perspective (Narver & Slater 1990), strategic approach (Ruekert 1992) and customer orientation perspective (Deshpande *et al.* 1993), four common areas of agreement were determined. The conceptual framework of Lafferty and Hult (2001) indicating the four identified areas of agreement is indicated in Figure 2.4 below and forms a key theoretical foundation for this thesis.

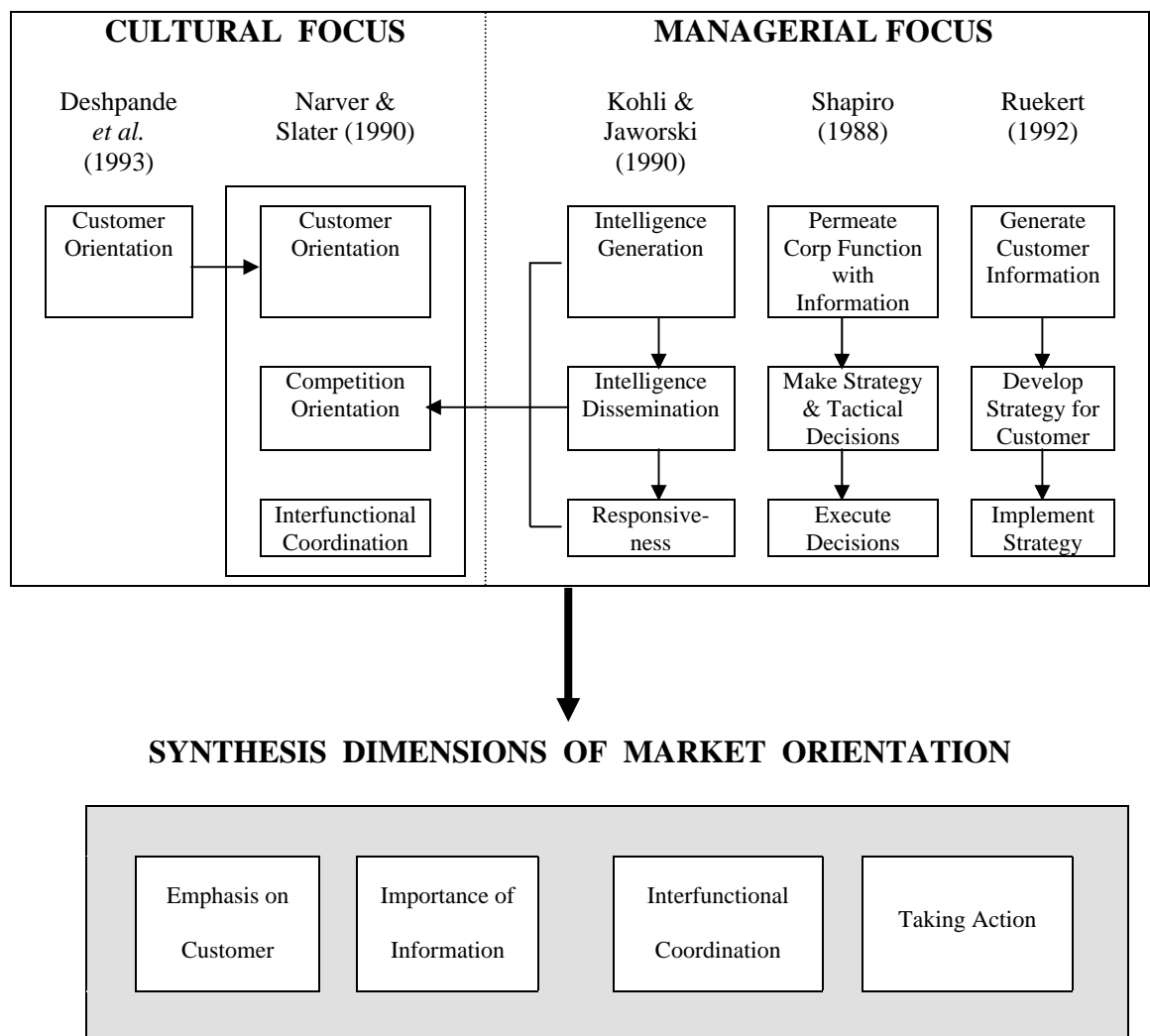


Figure 2.4 – *Synthesis Dimensions of Market Orientation* (Lafferty & Hult 2001, p. 100).

It should be noted that, irrespective of whether an organisation is providing a product in the form of a good or service, services marketing concepts such as those offered in seminal research by Parasuraman, Zeithaml and Berry (1985) play a key role in assisting organisations to operationalise three of these ‘synthesis dimensions of market orientation’ - emphasis on customer, interfunctional coordination and taking action. This is in keeping with Vargo and Lusch (2004a) who suggest that marketing is developing a service-dominant-logic.

2.2.2.2 Not-For-Profit Organisations

The previous section discussed the market orientation frameworks developed in the for-profit arena. Given the differences between for-profit and not-for-profit organisations, the validity of the market orientation frameworks developed originally in large for-profit organisations have been questioned by Sargeant, Liao and Foreman (Liao *et al.* 2001; Sargeant *et al.* 2002). These researchers questioned the application of the Narver and Slater (1990) framework to not-for-profit organisations because it was originally developed in the for-profit context with large organisations.

This suggests a potential issue if a for-profit market orientation is introduced into a not-for-profit organisation. Sargeant, Liao and Foreman (2002) also suggest the term ‘market’ is not relevant for not-for-profit organisations in the ‘economic sense of the term’ (p. 45) and that the term ‘market’ suggests an exchange whereas often there is no real form of exchange in not-for-profit organisations. The authors also argue that customer satisfaction is not always the aim of not-for-profit organisations and provide the example of an arts organisation likely to offer art forms that challenge people’s views and their satisfaction – all in the aim of long-term promotion of the art form.

Based on the differences between for-profit and not-for-profit organisations, the authors argue that the term ‘market orientation’ is inappropriate for not-for-profit organisations and thus developed a revised framework perspective specifically for the not-for-profit sector – ‘societal orientation’ (See Figure 2.5 below.) They consider the issue of competition is less relevant for not-for-profit organisations than it is in for-profit organisations and also consider the major difference between a market orientation and their proposed societal orientation is the additional component of consideration of ‘the needs of the wider society of which it forms part’ (p. 59). In support of this, Greenley, Hooley and Rudd (2005) suggest managers need to also consider the interests of other stakeholders when making marketing decisions.

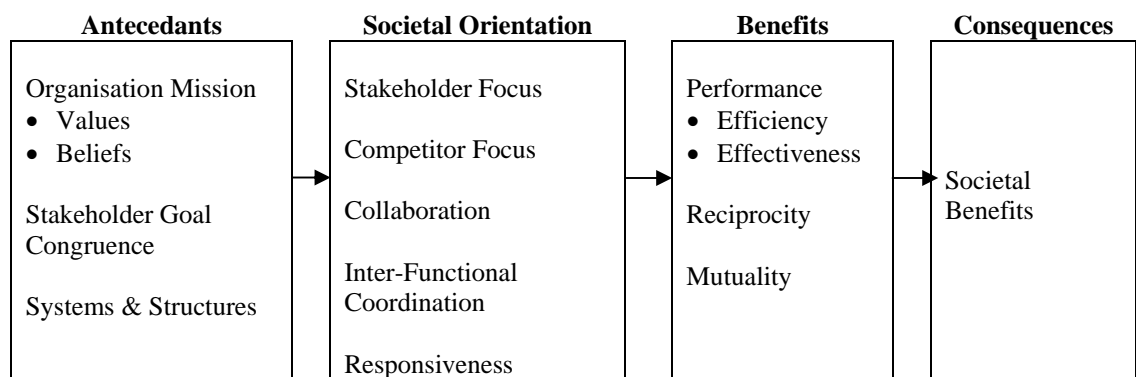


Figure 2.5 - *Societal Orientation Framework* (Sargeant *et al.* 2002, p. 49).

The components of societal orientation proposed by Sargeant, Liao and Foreman (2002) do however have close parallels with components of market orientation proposed by Narver & Slater (1990) and Kohli & Jaworski (1990) as indicated in Table 2.3 overleaf – ‘customer’ has been renamed ‘stakeholder’ to reflect a broader definition of customer in a not-for-profit context. A new component referred to as ‘collaboration’ has been added to reflect the manner in which competitors within the not-for-profit sector potentially may work together for

mutually benefit of the organisations and service recipient clients. It is not likely that collaboration will occur in regards to attracting new donor clients.

Table 2.3 – Comparison between Sargeant, Liao and Foreman (2002) Societal Orientation and Market Orientation components of Narver & Slater (1990) and Kohli & Jaworski (1990)

Sargeant, Liao and Foreman (2002) Components of Societal Orientation	
Stakeholder Focus	as per Narver & Slater (1990) ‘customer orientation’
Competitor Focus	as per Narver & Slater (1990) ‘competition orientation’
Collaboration	NEW
Inter-Functional Coordination	as per Narver & Slater (1990) ‘interfunctional coordination’
Responsiveness	as per Kohli & Jaworski (1990) ‘responsiveness’

Similarly, whilst also arguing that a specific market orientation model is required for not-for-profit organisations, Gonzalez, Vijande and Casielles (2002, p. 63) have simply modified the Kohli and Jaworski (1990) model of market orientation (intelligence generation, intelligence dissemination and responsiveness) by dividing customers into donors and beneficiaries as shown in Figure 2.6 below.

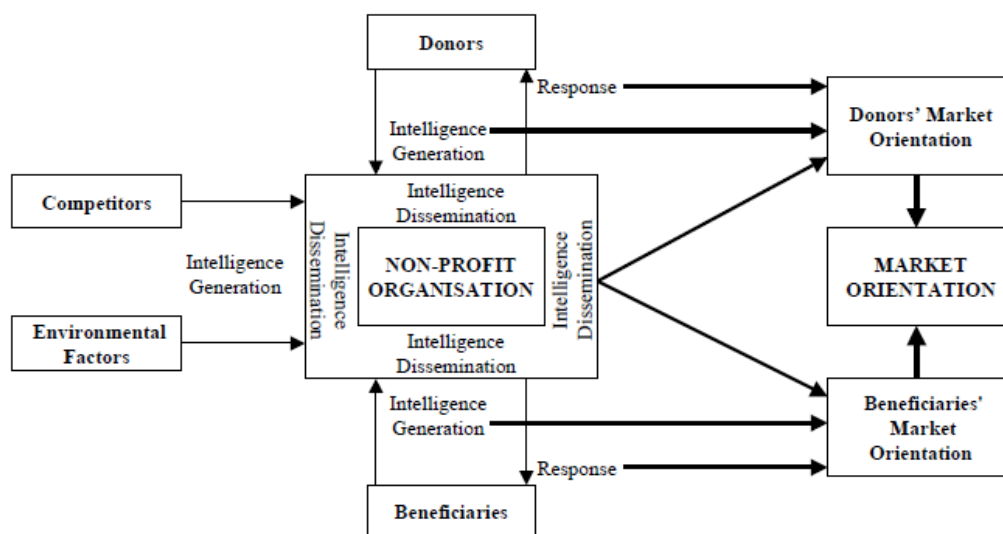


Figure 2.6 - Market Orientation Elements in Not-for-profit Organisations

(Gonzalez *et al.* 2002, p. 63).

More recently, Duque-Zuluaga and Schneider (2008) have offered a conceptual framework linking their interpretation of ‘societal orientation’ and not-for-profit organisational performance. Their framework is indicated in Figure 2.7 below.

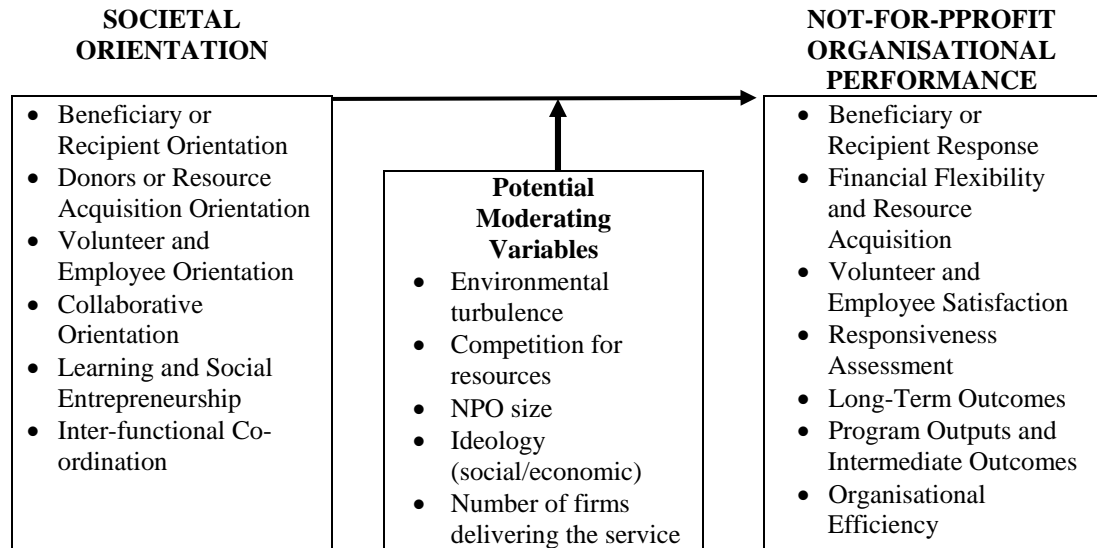


Figure 2.7 – Conceptual Framework Linking Societal Orientation and Not-for-profit

Organisational Performance (Duque-Zuluaga & Schneider 2008, p. 32).

The proposal of Duque-Zuluaga and Schneider (2008) can be regarded as similar to the Narver & Slater (1990) framework with minor adaptation for a not-for-profit context as indicated in Table 2.4 overleaf. Narver & Slater’s (1990) ‘customer’ has been divided by Duque-Zuluaga and Schneider (2008) into three subsets – beneficiary/recipient, donor, volunteer/employee; and inter-functional co-ordination is as per Narver & Slater (1990). Similarly to Sargeant, Liao and Foreman (2002), a new component referred to as ‘collaborative orientation’ has been added to reflect the manner in which competitors within the not-for-profit sector potentially may work together for mutually benefit of the organisations and service erecipient clients. Learning and entrepreneurship has been added, but this is often regarded as a moderator/antecedent to market orientation by other researchers.

Table 2.4 – Comparison between Duque-Zuluaga & Schneider (2008) Societal Orientation and Market Orientation components of Narver & Slater (1990) and Kohli & Jaworski (1990)

<i>Duque-Zuluaga & Schneider (2008)</i> Components of Societal Orientation	
Beneficiary or Recipient Orientation	as per Narver & Slater (1990) ‘customer orientation’
Donors or Resource Acquisition Orientation	as per Narver & Slater (1990) ‘customer orientation’
Volunteer and Employee Orientation	as per Narver & Slater (1990) ‘customer orientation’
Collaborative Orientation	NEW
Learning and Social Entrepreneurship	Regarded as moderator or antecedent to market orientation
Inter-functional Co-ordination	as per Narver & Slater (1990) ‘inter-functional coordination

These frameworks offered by Sargeant, Foreman and Liao (2002), Gonzalez, Vijande and Casielles (2002) and more recently by Duque-Zuluaga and Schneider (2008) are the only market/societal orientation frameworks found during the review of literature that specifically aim to offer a customised market orientation model for the not-for-profit sector. These frameworks, aiming to define market orientation in the not-for-profit context are, as indicated above, basically adaptations of the models developed by other researchers in a for-profit context. They do however highlight the broader scope of not-for-profit customers/clients, namely donor clients and service recipient clients. Multiple stakeholders exist moreso for not-for-profit organisations than in for-profit organisations. Thus, it is possible that different stakeholders in a not-for-profit setting may respond differently: donor clients for example may respond moreso to a market orientation, whilst service recipient clients may respond better to a societal orientation.

The frameworks provide useful background material but could be regarded as somewhat broad as they attempt to cover all sub-sectors of the not-for-profit sector in a single framework, whereas charities are totally different to, for example, an arts organisation and thus there is a need to develop separate frameworks for each sub-sector. Thus, it could be argued that the not-for-profit sector is perhaps too broad to be addressed by an all-encompassing market orientation framework and that each distinct not-for-profit sub-sector, such as the charity sub-sector requires its own customised framework.

2.2.2.3 Framework Overview

As discussed above, various frameworks have been proposed to describe market orientation, with the seminal frameworks of Kohli and Jaworski (1990) as well as Narver and Slater (1990) tending to be the basis upon which variations have been developed by other researchers since then. These frameworks of market orientation have formed the platform for research into market orientation in a range of situations. Lafferty and Hult (2001) conducted a meta-analysis of for-profit frameworks including the seminal frameworks of Kohli and Jaworski (1990) and Narver and Slater (1990) to develop four key synthesis dimensions of market orientation. In the not-for-profit sector Sargeant, Liao and Foreman (Liao *et al.* 2001; Sargeant *et al.* 2002), Gonzalez, Vijande and Casielles (2002) and Duque-Zuluaga and Schneider (2008) have made initial contributions towards development of an appropriate market/societal orientation framework for the broad not-for-profit sector but these are basically slight adaptations of the frameworks developed in the for-profit arena (as exemplified by Tables 2.3 & 2.4 above).

These contributions offer background for the research conducted in this thesis. However, the specific framework and definition of market orientation utilised in this thesis is based on the Lafferty and Hult (2001) meta-analysis as it combines the views offered by a number of researchers including the seminal research of Kohli and Jaworski (1990) as well as Narver and Slater (1990), upon which the not-for-profit frameworks discussed in Section 2.2.2.2 are based. There is however a need to be ever mindful of the nature of customers/clients in the not-for-profit sector – donor clients as well as service recipient clients.

2.2.3 Aspects of Market Orientation

Based on the various definitions of market orientation as discussed above, numerous research has been conducted into a range of aspects of market orientation. Examination of this research enables a greater understanding of the types of issues that can be explored whilst interviewing the charity employees within the field data collection stage of this thesis when examining the nature of the marketing discourse introduced into the charity.

The marketing discourse utilised in this thesis that is perceived to typify the full dimensions of market orientation is based on Lafferty and Hult's (2001) meta-analysis that characterises the key dimensions of market orientation to be: emphasis on customers, importance of information, interfunctional coordination and taking action.

Following an extensive review of literature, Appendix 1 contains a list highlighting the range of market orientation related aspects that have been conducted by previous researchers. The list is divided into five broad sections - antecedents and

moderators, measurement development and validation, performance outcomes (consequences), special situations (e.g. government) and finally, theoretical/conceptual issues. Relative to research within the for-profit sector, the list shows a limited and fragmented amount of research has been conducted in the not-for-profit arena, with no research having been conducted regarding the affect on employees of introducing market orientation into not-for-profit organisations, further justification for conduct of the research in this thesis. A framework regarding the antecedents, consequences and moderators of market orientation was originally proposed by Jaworski and Kohli (1993). Table 2.5 overleaf provides a summary of the typical issues in these areas that have been conducted since then. Whilst these issues have mainly been researched in the for-profit arena, potential relevance to charities is indicated in the right hand column of the Table and offers insights into the aspects of market orientation that need to potentially be considered when examining the introduction of a marketing discourse during the field data collection stage of this thesis. The following pages contain a summary of these issues identified in the review of literature whilst a more detailed description is provided in Appendix 2.

**Table 2.5 – Summary of Research Regarding Antecedents, Consequences and Moderators
of Market Orientation.**

Issue	Potential Relevance To Charities
Innovation, entrepreneurialism, new product development, learning	Improved revenue generation and service delivery
Capability / responsiveness	Capacity and efficiency
Market planning	Smooth operations
Relationships	Assist market orientation
Market research / knowledge	Assists market orientation
Cross-cultural	Potential differences across countries
Internal marketing / relationships within the firm	Assists introduction
Barriers	Potential numerous barriers to introduction of market orientation
Company structure	Charity status
Age of firm	Life cycle
Organisational goals	Competing goals
Size of firms	Size can affect operations
Various industries	Market orientation relevant to charities

2.2.3.1 Innovation / entrepreneurialism / new product development / learning

Various research suggests that innovation (Gatignon & Xuereb 1997; Kumar *et al.* 2000; Matear *et al.* 2004) and entrepreneurial style (Covin & Slevin 1988) can positively affect organisational performance. There are however conflicting views regarding the linkage between market orientation and innovation with, for example, Mavondo, Chimhanzi and Stewart (2005, p. 1256) considering ‘market orientation is an important antecedent to product innovation’ whilst Matear, Osborne, Garrett and Gray (2002) suggest innovation is separate to market orientation but necessary for effective firm performance. In a not-for-profit hospital setting Wood, Bhuian and Kiecker (2000) identified a positive link between market orientation and entrepreneurship.

Various studies suggesting that a learning organisation is perhaps a higher level than market orientation have been conducted (Baker & Sinkula 1999a, 1999b, 2002) and contend that a learning orientation resource increases ability to effectively utilise a market orientation. In a not-for-profit setting, a conceptual paper by Murray and Carter (2005) proposes that a learning capacity within not-for-profit organisations will assist improvement in marketing intelligence and that a culture of learning, plus individual as well as team training are suggested as methods to assist developing a market orientation.

2.2.3.2 Capability / responsiveness

Weerawardena and O'Cass (2004, p. 419) examined the characteristics of market-driven organisations and the antecedents to sustained competitive advantage and suggest 'that market-focused learning and marketing capability are critical capabilities shaping innovation-based competitive strategies in market-driven firms'. Likewise, Pelham (2000, p. 48) considers the 'most influential market orientation elements are fast response to negative customer satisfaction information, strategies based on creating value for customers, immediate response to competitive challenges, and fast detection of changes in customer product preferences'. No research regarding capability within not-for-profits was found during the review of literature.

2.2.3.3 Market planning

The relationship between the marketing planning process and market orientation has been researched by Pulendran, Speed and Widing (2003, p. 476) who determined that 'high quality marketing planning can lead to performance benefits,

but as antecedent to a market orientation, rather than as an independent activity'. No research in relation to market planning in a not-for-profit context was found during the review of literature.

2.2.3.4 Relationships

Being close to the customer is a key factor in becoming a better performing organisation (Peters & Waterman 1984), and the marketing concept relates to developing a relationship with customers rather than simply making a sale (Webster Jr 1994a; 1994b). Dalgic (1998, p. 57) developed a conceptual model of market orientation that emphasised the importance of customer relationship and stated that 'a market orientation ... is based on the relationship marketing concept'. No research in relation to relationship building in a not-for-profit context was found during the review of literature.

2.2.3.5 Market research / knowledge

The process of actually gaining competitive intelligence has been analysed by Jaworski, Macinnis and Kohli (2002) who consider there are three distinct phases to the competitive intelligence generation process – organising to get intelligence, searching for intelligence and then sense-making of intelligence. The importance of involving the entire organisation in intelligence generation was considered by Cravens, Piercy and Prentice (2000, p. 374) who caution that 'market sensing is far too complex to rely only on top management's perspectives as many others in the organisation are close to the market', such as sales staff.

In a not-for-profit context, Martinsons and Hosley (1993, p. 40) case studied a Hong Kong hospital and considered 'information requirements for marketing decisions in this not-for-profit organisation are quite similar to those of profit-seeking enterprises'.

2.2.3.6 Cross-cultural

Mixed findings have been found regarding whether cultural factors affect the potential to develop a market orientation. Deshpande and Farley (1999) surveyed large Indian and Japanese firms and found that market orientation and corporate culture are key issues in determining organisational success however, Deshpande, Farley and Webster (2000) subsequently found that there was no difference in the relationship between market orientation and business performance across countries. Likewise, in one of the first global assessments of market orientation, Cano, Carillat and Jaramillo (2004) conducted a meta-analysis utilising fifty-three existing empirical studies and concluded that there is a positive relationship between market orientation and business performance and that culture does not affect the relationship. No research across cultures in a not-for-profit setting was found during the review of literature.

2.2.3.7 Internal marketing / relationships within the firm

Internal employee factors can be a key issue in overall market orientation development. These issues have been analysed by Harris (2002) in organisations that had recently introduced a market orientation. Rationales for employees resisting market-oriented change were determined to be - politically motivated to affect the

authority of certain departments, due to perceived negative affects on resource availability, due to perceived prioritisation of market orientation issues over other issues, and exploitation of employees to achieve the new direction.

Naude, Desai and Murphy (2003) assessed internal market orientation and suggested local and direct management as well as socialisation and satisfaction were key contributors to internal market orientation whilst Harris and Ogbonna (2001) suggest that participative and supportive leadership styles were strongly linked with market orientation.

In a Canadian not-for-profit social service, community and arts setting, Gainer and Padanyi (2005) determined that employee culture was a significant determinant in improving market orientation and hence performance.

2.2.3.8 Barriers

Introducing a market orientation is often regarded as problematic and can be hindered by organisations having difficulty developing customer focus, conflict between short and long-term goals and the personal values of top managements (Webster Jr 1988). Other reasons offered for non-achievement of market orientation include flawed measures of customer satisfaction, inappropriate customer complaint mechanisms, rejection of competitor threats and strategic inertia (Mason & Harris 2005). Only one paper (Gainer & Padanyi 2005) regarding barriers to developing a market orientation in a not-for-profit setting was found during the review of literature.

2.2.3.9 Company structure

Kohli and Jaworski (1990) suggested that the structure of an organisation may impact on the implementation of a market orientation. Green, Inman, Brown and Willis (2005) analysed decentralisation, job specialisation, departmental integration and formalisation and concluded that only formalisation affected market orientation. No research regarding organisational structure in a not-for-profit setting was found during the review of literature.

2.2.3.10 Age of firm

Perry and Shao (2002) postulated that the relative importance to firms of market orientation may vary between existing and new firms within an industry due to differing capabilities. Contrary to this, Becherer, Halstead and Haynes (2001) suggest years of operation were not significant. No research regarding age of organisations in a not-for-profit setting was found during the review of literature.

2.2.3.11 Organisational goals

Goals are extremely important for all organisations. Based on a survey of small business owners, Blankson and Stokes (2002) found profitability to be important, but long-term objectives less important. In the not-for-profit sector, goals can vary dramatically from those of for-profit organisations. Whilst for-profit goals tend to be financially related, goals for not-for-profits (as well as financial goals related to donation levels), typically include levels of volunteer recruitment. Gainer and Padanyi (2002) consider there was sometimes suspicion about using business practices in not-for-profit organisations as they may divert the organisation away

from its traditional mission and values - a clash of goals. Subsequently, they conducted research that they consider provides empirical evidence that the market orientation versus performance linkage 'can be extended to the nonprofit sector' (Gainer & Padanyi 2005, p. 860).

2.2.3.12 Size of firms

There is conflicting research regarding the affect of organisation size on market orientation in the for-profit sector. Becherer, Halstead and Haynes (2001) suggest that market orientation increases with company size whereas Pelham (2000) found a negative relationship existed between firm size and market orientation. Opposing both these contrasting perspectives, size is considered irrelevant by other researchers (Blankson & Cheng 2005; Low 2005).

A similar conflict exists in not-for-profit organisation research, with Seymour, Gilbert and Kolsaker (2006) finding smaller charities to have the lowest level of market orientation whereas Balabanis, Stables and Phillips (1997, p. 599) measured adoption of the marketing concept in the top 200 British charities and concluded 'that larger organisations were more reluctant or able to become market oriented. Size was found to inhibit all three components of market orientation'.

2.2.3.13 Various industries

The vast majority of research relating to aspects of market orientation has been conducted in a range of private for-profit organisations. A few studies have been conducted in the public sector. Some research, albeit limited and fragmented has been conducted on not-for-profit organisations. For example, Sehorn (1995) researched

not-for-profit community service organisations, Jones (2000) examined UK opera companies and Gainer and Padanyi (2002) examined arts organisations in Canada. Also, Harrison and Shaw (2004) assessed a Victorian (Australia) library.

2.2.4 Section Summary

The review of market orientation literature has shown that theory relating to market orientation originated within the for-profit sector, initially within large US organisations. Research then spread to other countries and to smaller organisations as well. Whilst a large body of research exists regarding various aspects of market orientation within the for-profit sector, research regarding market orientation within the not-for-profit sector is less extensive and somewhat fragmented.

2.3 Knowledge Gaps in Literature

2.3.1 Identified Gaps

The review of delivery of the marketing concept via introduction of a market orientation has indicated that relative to the for-profit arena, less research has been conducted in the not-for-profit arena. Table 2.6 overleaf indicates the ‘intensity’ to which various relevant issues have been addressed in the existing literature and shows that 85% of market orientation papers reviewed related to the for-profit sector. This suggests scope to progress research of these issues in a not-for-profit context given the strong support for these concepts in the for-profit context. The discourses developed in the for-profit arena, if introduced into the not-for-profit arena may

require modification to compensate for the differences between the for-profit and not-for-profit operating environments.

Section 2.2 contained a comprehensive review of market orientation – the manner in which the classical marketing concept is operationalised. The Section was structured and arranged to focus on market orientation content issues, potential limitations of existing market orientation research and identify and comment on gaps in existing research. Issues discussed have included definitions, various frameworks of market orientation, assessment of frameworks regarding commonalities and differences between the differing views, and also antecedents, consequences and moderators of market orientation.

As noted in Table 2.6, more market orientation research has centred in the for-profit sector (85%) than in the not-for-profit sector (15%). In regards to the market orientation issues covered in the papers reviewed, the majority (62%) related to aspects of antecedents and moderators of market orientation with 86% of this research conducted in the for-profit sector. Only 8% of papers reviewed addressed issues relating to barriers to introduction of market orientation, whilst there were no papers found that specifically examined the actual introduction of market orientation into an organisation, either in the for-profit or not-for-profit sector. Thus, little information towards addressing the research purpose of this thesis can be gleaned from the existing literature.

Table 2.6 – Intensity To Which Various Relevant Issues Have Been Addressed In Existing Literature.

		Market Orientation Research Intensity*			
		Issue versus Organisation Analysed.			
		Organisation Analysed			
Profit Vs Not-for-profit		Profit <i>Very High</i> (85%)		Not-for-profit	
				<i>Very Low</i> (15%)	
Organisation Size Large Vs SME		Large <i>Low</i> (39%)	SME	Large <i>Medium</i> (45%)	SME
			<i>High</i> (61%)		<i>Medium</i> (55%)
Issue					
Antecedents & Moderators	(62%)	<i>Very High</i> (86%)		<i>Very Low</i> (14%)	
MO Measurement Development & Validation	(11%)	<i>Very High</i> (94%)		<i>Very Low</i> (6%)	
Performance Outcomes (Consequences)	(7%)	<i>High</i> (64%)		<i>Low</i> (36%)	
Conceptual	(12%)	<i>High</i> (72%)		<i>Low</i> (38%)	
Barriers to MO	(8%)	<i>Very High</i> (92%)		<i>Very Low</i> (8%)	
Introduction of MO	(0%)	<i>Nil</i> (0%)		<i>Nil</i> (0%)	

* Based upon count of number of relevant papers examined during Market Orientation literature review, converted to a percentage.

Key: Very Low = 0-20% Low = 21-40% Medium = 41-60% High = 61-80% Very High = 81-100%

Some papers covered more than one issue and were thus included under more than one 'Issue' category if relevant.

Whilst not claiming to be a totally exhaustive review of the entire literature regarding market orientation, the review provides indicative relativities regarding the issues conducted by researchers as well as the relativity between for-profit and not-for-profit market orientation research.

The volume of market orientation research varies between large organisations and small to medium enterprises (SME's), and between for-profit and not-for-profit organisations – with the least research occurring within not-for-profit organisations. Within the market orientation literature, the *major gap is the relatively limited research of not-for-profit organisations* compared to for-profit organisations. The review of the literature has uncovered a large body of scholarly research regarding definition, measurements scales, antecedents, consequences and moderators of market orientation. This research has been conducted in a range of industries and locations. The research has, however, concentrated on large for-profit organisations, with less concentration on SME's, and even less concentration on not-for-profit organisations. The seminal studies have been conducted on large, for-profit organisations. There is thus *a gap in the literature due to the limited and fragmented examination of market orientation within not-for-profit organisations*. This assessment is reinforced by the recent comments of various researchers as highlighted in Table 2.7 overleaf.

The key conclusion from the review of literature is that application of the marketing concept; operationalised by *introduction of a market orientation within the not-for-profit sector is a relatively under-researched area*. Vast amounts of information have been developed in the for-profit context regarding market orientation, but less in the not-for-profit area. Indeed, what research has been conducted in the not-for-profit context, particularly in relation to frameworks of market orientation has been somewhat broad and has taken a 'blanket' approach attempting to cover all forms of not-for-profit organisations – or has explored basic aspects of market orientation in not-for-profit sub-sectors.

**Table 2.7 - Comments from Academics Highlighting Lack of Market Orientation Discourse Research
in the Not-for-profit Arena.**

<p>Warnaby and Finney (2005, p. 185)</p> <p>Relative to research on profit oriented organisations, ‘not-for-profit organisations have been somewhat neglected by comparison’</p>
<p>Barrett, Balloun and Weinstein (2005a, p. 214)</p> <p>In regards to issues of market orientation and factors such as learning orientation, entrepreneurship and performance ‘the non-profit sector has only recently attracted attention from researchers ...’</p>
<p>Bennett and Sargeant (2005, p. 802)</p> <p>‘the quality of research is variable and the volume is low ...’ in regards to ‘nonprofit literature’</p>
<p>Kara, Spillan and DeShields (2004, p. 59)</p> <p>‘such studies in non-profit organisations are scarce ...’</p>
<p>Sargeant, Foreman and Liao (2002, p. 42)</p> <p>‘there is only a limited amount of extant research focusing on market orientation and nonprofits ...’</p>

The summary of knowledge gaps discovered via the literature review offers an overall direction for this research. Whilst vast amounts of research have examined the for-profit market orientation, and researchers consider market orientation is relevant for not-for-profits, no research has yet been conducted to develop a framework to identify the process by which market orientation can be introduced successfully into a traditional not-for-profit organisation. This is thus the purpose of this thesis.

Given that the thesis examines the views and experiences of employees within a charity when management introduces a market orientation, an appropriate perspective to

use revolves around discourse. The rationale for using a discourse perspective in this thesis is that, given discourse is a meaning creating system, discourse provides an appropriate lens through which to examine the manner in which a charity and its employees perceive and experience a change when a market orientation is introduced via management action.

2.3.2 Implementation of the Marketing Concept via Introduction of Market Orientation

As indicated above, the purpose of this thesis is to identify the process by which market orientation can be introduced successfully into a traditional not-for-profit organisation. A review of the literature has not discovered any research specifically related to examination of the introduction of market orientation into an organisation and its subsequent affects on employees. Some research has however examined the barriers to introduction of market orientation and these aspects are discussed in this section to inform the thesis primary research.

The actual implementation of market orientation into an organisation is not considered straight-forward and has been hindered in some instances due to organisations having difficulty developing customer focus due to barriers such as an incomplete understanding of the marketing concept, conflict between short and long-term goals, top managements' own values and also failure to define markets in terms of customers (Webster Jr 1988). Harris and Ogbonna (2001) have identified leadership style as a key to successful introduction of market orientation with Savitt (2001) considering that many managers simply do not know what market orientation involves. Wong, Saunders and Doyle (1989) consider a key barrier to introduction of a market orientation is difficulty in attempting to change traditional thinking, self-interest of staff

and lack of cooperation between functional units. Harris (1996b) as well as Gainer and Padanyi (2005) have identified existing cultural aspects within an organisation as a potential impediment. Harris (1998) has determined seven categories of impediments to development of a market orientation, namely – apathy, little personal reward, limited power of shopfloor workers to make improvement decisions, short-term employment perspective of workers, compartmentalisation of job tasks, lack of marketing knowledge of workers and weak management support. These barriers are both people-focused as well as system-focused (Harris & Piercy 1999). Other reasons offered for non-achievement of market orientation include flawed measures of customer satisfaction, inappropriate customer complaint mechanisms, rejection of competitor threats and strategic inertia (Mason & Harris 2005).

Specifically in a small to medium enterprise context, impediments to development of a market orientation include narrow domains/compartmentalisation, poor reward systems, formalised and structural barriers, ignorance of market orientation, limited resources, perceived inappropriateness, contentment with the current situation, a short-term focus, an unclear view of customers and a lack of competitive differentiation (Harris 1996b; Harris & Watkins 1998; Kippenberger 1998). Requirements for development of a market orientation in smaller organisations include structural connectedness, a service focused strategy, a cost focused strategy, internal communications, integration devices, marketing function controlled co-ordination systems, structural formalisation and structural centralisation (Harris 2000). All this research regarding barriers to introduction of market orientation have occurred within a for-profit context except the research of Gainer and Padanyi (2005). These issues regarding impediments to introduction of market orientation will be examined during the primary research stage of this thesis.

2.4 Services Marketing

Services marketing is a vital element in achieving a market orientation. The majority of ‘products’ offered by not-for-profit charities tend to be services (e.g. guidance and counselling) rather than goods. It is also argued by Grönroos (1990) that a service perspective is becoming dominant as different views between goods and services are disappearing with services becoming the key focus of marketing. Even provision of a good involves a significant element of service. Similarly, Vargo and Lusch (2004a; 2006; 2008a; 2008b) consider services marketing to now be the new dominant logic within marketing. Given the vital role services marketing plays in assisting to develop a market orientation, it is relevant to briefly review the literature in relation to services marketing as it assists in developing topics that can be examined in relation to the introduction of marketing discourse into charities. Thus, Section 2.4.1 defines services marketing whilst Section 2.4.2 reviews the development of services marketing and results in identifying the five key topics that have been the main focus of services marketing research.

2.4.1 Definition

The seminal definition of a service was developed by Grönroos (1990, p. 27) who defined a ‘service’ as ‘an activity or series of activities of more or less intangible nature that normally but not necessarily, take place in interactions between the customer and service employees and/or physical resources or goods and/or systems of the service provider, which are provided as solutions to customer problems’. Simpler definitions regard services as involving deeds, processes, performances and experiences (McColl-

Kennedy 2003; Zeithaml & Bitner 2003) with the majority of value being intangible (Lovelock *et al.* 2004).

2.4.2 Development of Services Marketing and its Application to Not-for-profit

Organisations

Services marketing theory emerged as a separate area of marketing in the early 1970's from the existing knowledge regarding marketing of manufactured physical goods (Shostack 1977) following problems adopting goods-marketing approaches in various industry settings (Berry & Parasuraman 1993; Kotler & Connor Jr 1977; McColl *et al.* 1998). Key differences between goods and services are that services are intangible, heterogeneous, inseparable (generally simultaneous production and consumption) and perishable (Zeithaml & Bitner 2003).

Fisk, Brown and Bitner (1993) have identified three stages in the evolution of services marketing. Firstly, 'crawling out' (pre-1980) based on seminal work by Shostack (1977) and Grönroos (1978), secondly, 'scurrying about' (1980-1986) typified by the research into classification of services, service quality, service encounters, relationship marketing and internal marketing. Seminal work during this period included an expanded marketing mix suggested by Booms and Bitner (1981), Lovelock's (1983) classification system for services, and Zeithaml, Berry and Parasuraman (1985) who offered the 'gaps model' of service quality enabling practitioners to identify where gaps in service quality may be occurring in the service delivery process. The third stage identified by Fisk, Brown and Bitner (1993) was 'walking erect' (post-1986) with services marketing established and recognised as a distinct area of marketing. It should be noted that seminal market orientation research

(e.g. Kohli & Jaworski 1990; Narver & Slater 1990) commenced after the establishment of services marketing, thus aspects of services marketing were considered and included in development of market orientation theory.

The traditional marketing theory developed around the “4P’s” marketing mix for physical products was regarded as inadequate by services marketing researchers and was expanded for services to include items covering people, processes, customer service and physical evidence (Booms & Bitner 1981; Payne 1993) with Beaven and Scotti (1990, p. 16) suggesting a substitute to the “4P’s” in the form of their ‘SOAR’ model – service scripts, outlay, accommodation and representation.

Marketing discourse is regarded as more complicated from a services perspective than from a goods perspective because ‘market orientation requires more thoroughly understood and accepted responsibility for customers and authority to take actions to serve them ...’ (Rao 2009, p. 61). In addition, the ‘basic characteristic of services is their process nature’ (Grönroos 2000, p. 15) and the key to ‘marketing of services is how the service production process and service consumption process match each other, so that customers perceive good service quality ...’.

Services marketing is particularly applicable to the not-for-profit sector, especially the charity sub-sector as these organisations typically offer services rather than physical products. Based on the subtle differences between traditional physical goods marketing and services marketing, as well as a review of literature, Fisk, Brown and Bitner (1993) suggest five specific topics have formed the focus of services marketing research, namely service quality (e.g. Parasuraman *et al.* 1988), service encounters/experiences (e.g. Bitner 1990, 1992), service design (e.g. Shostack 1984, 1985, 1987), internal marketing (e.g. Gummeson 1987a), and also customer retention and relationship marketing (e.g. Gummeson 2002). Charities typically have two types

of clients – donor clients and service recipient clients. In a charity setting, issues such as retention and relationship building are more relevant to donor clients than to service recipient clients. These five topics thus assist to inform the research in this thesis in that they offer areas for exploration when examining the aspects of marketing discourse introduced into the charities. Whilst the traditional charity discourse provides a service to its (service recipient and to a lesser extent donor) clients, services marketing principles as a component of marketing discourse have potential to offer further insight and benefits to charity organisations to improve performance. The five key services marketing research topics identified by Fisk, Brown and Bitner (1993) are discussed in Section 2.4.3 below, with a more detailed examination contained in Appendix 3.

2.4.3 Key Services Marketing Research Topics

2.4.3.1 Service quality

Service quality is a key issue in services marketing and has thus been the subject of perhaps the largest proportion of services marketing research. Whilst many researchers have examined service quality, it has typically been done in a for-profit environment with minimal research in the not-for-profit setting. Service quality can be regarded as a key factor in delivering a high level of market orientation and is a factor in the ‘taking action’ dimension of Lafferty & Hult’s (2001) perspective of market orientation.

Maister (1984) and Zeithaml (1988) consider quality to be relative to what customers expect and what they receive, whilst Garvin (1984) suggests services that simply meet customer preferences can be regarded as being of high quality. What constitutes service quality within a not-for-profit setting may however vary considerably

between the two distinct clients – donor clients and service recipient clients. The requirement of quality may perhaps be less relevant for service recipient clients who may simply be happy to receive whatever is on offer.

SERVQUAL and the Gaps model (Parasuraman *et al.* 1991b; Parasuraman *et al.* 1985, 1988; Zeithaml *et al.* 1988) are regarded as the seminal measures of service quality and have been found to be appropriate in various settings by numerous researchers (e.g. Brensing & Lambert 1993; Chenet *et al.* 2000; Clow *et al.* 1996; Espinoza 1999; Zeithaml *et al.* 1996). Despite its popularity, SERVQUAL has been criticised for various reasons (Baron & Harris 1995; Palmer 2001; Spreng & Singh 1993; Teas 1993, 1994) including that expectations can only be based on previous experiences. Most of the research regarding SERVQUAL has been conducted in a for-profit setting. Vaughan and Shiu (2001, p. 131) contend that the SERVQUAL model ‘is inappropriate for services that [have] no close analogue with the private sector’ thus they modified SERVQUAL to develop ARCHSECRET - a measure of service quality tailored for the voluntary sector in Scotland. In regards to charities, this model may be useful for charities that rely on a high number of voluntary employees, but it only assesses quality delivered to service recipient clients, and does not assess quality delivered to donors.

A high level of market orientation is regarded as needed to enable a high level of service quality (Chang & Chen 1998), that is, market orientation comes before service quality. It is generally accepted that a level of market orientation has a direct relationship to performance and a number of different research projects have investigated the relationship between service quality and profitability. Both positive and negative linkages have been found (Zeithaml 2000) and this perhaps suggests that, in some cases, managers are over-delivering (at added cost hence reduced profitability)

without gaining an increase in customer volume to offset the extra costs. This is an interesting issue that has high relevance to the not-for-profit sector particularly in relation to delivery of services to service recipient clients. Charities typically have a shortage of resources, thus how much service is enough?

2.4.3.2 Service encounters / experiences

The term ‘servicescape’ can be defined to be ‘the built environment surrounding the service’ (Bitner 2000, p. 37) with the aesthetic value of the servicescape playing a key role in marketing a service (Donovan & Rossiter 1982; Foxall & Greenley 1999; Wagner 2000), and impacting on ‘*both* customers and employees’ (Bitner 1992, p. 57).

For-profit organisations may utilise a high-class servicescape to assist justification of high prices. In the not-for-profit arena, there potentially may be less emphasis on servicescape. Service recipient clients may be grateful for whatever services they can receive irrespective of the servicescape, and client donors who are concerned that their donations are being utilised efficiently may not want to see elaborate and expensive servicescapes. Employees however would want to work in pleasant surroundings, thus managers of not-for-profit organisations need to determine an appropriate balance in servicescape to appease all stakeholders.

2.4.3.3 Service design & delivery

Grönroos (1990) considered there is a need to ensure all aspects of an organisation are operating correctly, particularly when a ‘moment of truth’ occurs, namely interactions either directly or indirectly by a customer with the various resources of a service organisation. Shostack (1985) claimed the interaction between the service

provider and the recipient must be thoughtfully managed and a technique of 'blueprinting' was offered to analyse and map all aspects of the service process with an aim for ensuring seamless service occurs 'without interruption, confusion or hassle to the customer' (Hoffman & Bateson 2002, p.414).

Efficient service delivery requires 'an ongoing commitment' from management (Watson R T *et al.* 1998, p. 61) as well as trust, commitment and integration of co-operation across functions (Lovelock 2000). This affects the 'interfunctional coordination' aspect of Lafferty & Hult's (2001) perspective of market orientation. In line with the trend towards a service-dominant logic (Vargo & Lusch 2004a) and the concept of value, the customer becomes a key component in the development of value (Payne *et al.* 2006). Associated with this is the concept of 'customer engagement' with the customer potentially engaged on up to three levels - physical, emotional and cognitive (Patterson & Yu 2006). Thus, both 'employment engagement' and 'customer engagement' can affect service quality. This can have issues in the charity context where there are two distinct types of target customers – donor clients and service recipient clients. Donors may simply want minimal physical engagement, but maximum emotional engagement in the discourse. Whilst efficient service delivery is likely to be relevant when clients are paying for services, issues of services delivery in the not-for-profit environment are likely to be important to donor clients, but perhaps of less importance to service recipient clients who may simply be grateful to receive assistance although the charity will want to use efficient service delivery to minimise use of scarce resources.

2.4.3.4 Internal Marketing

Employees are a key component in service provision within a market-oriented organisation with ‘interaction between employees and customers [being] ...a prime determinant of the customers’ perceptions of service quality’ (Lewis & Gabrielsen 1998, p. 86). Homburg and Pflesser (2000) consider that development of a market-oriented culture amongst employees requires not only establishment of norms (e.g. openness of communication, empowerment) but also relevant artefacts (e.g. rituals). Employees are required to ‘buy-in’ to the need to deliver a marketing discourse. The need to market to internal employees is seen as highly appropriate in assisting development of a high quality of service as a key component of a marketing discourse and this can have issues in the not-for-profit sector where there is often a high reliance on volunteer staff, particularly part-time employees whom are likely to spend less time per week at the charity and have differing motivations to paid employees.

2.4.3.5 Relationship Marketing

The term ‘relationship marketing’ first appeared in services marketing literature (Aijo 1996) in a seminal article by Berry (1983, p. 25) in which relationship marketing was defined as ‘attracting, maintaining, and – in multi-service organisations – enhancing customer relationships’. The key reason for organisations to develop relationships with customers is because it is normally ‘much more profitable to retain existing customers than continually seeking to recruit new customers to replace lapsed ones’ (Palmer 2001, p. 115).

Although commitment is a key aim in relationship development, Diller (2000) questions how committed customers actually are to developing a relationship. Whilst

the issue of relationship marketing is a key factor within a marketing discourse within the for-profit sector, it is likely to need some form of modification within the not-for-profit sector. Once the needs of a service recipient client of a charity have been addressed, it is perhaps likely that the service recipient client would not want a continuing relationship with the charity. Do service recipient clients want an ongoing relationship with a charity or do they simply want a more transactional-based approach to address their needs? Also, the charity may in fact be happy that the service recipient client no longer needs the services of the charity. However, in regards to donor clients, this is a key focus for charities in regards to relationship marketing and charities need to justify to donor clients why the donor client should continue a relationship with the charity. Issues of commitment and value exchange raise particular ideas for investigation within the charity sector. Do donors want an ongoing relationship? Indeed, do they have the financial resources to offer ongoing donations?

The 'synthesis dimensions of market orientation' (Lafferty & Hult 2001, p. 100) highlight that information is important to enable development of a marketing discourse. The development of relationships requires a strong information system and the key to a company delivering quality service is based upon its ability to collect, process and distribute information (Berkley & Gupta 1995). A customer retention plan is seen as paramount to relationship development (DeSouza 1992; Ronsenberg & Czepiel 1984) and involves analysis and acting upon information.

The majority of relationship marketing research has been conducted in a for-profit setting, indeed, MacMillan, Money, Money and Dowling (2005, p. 816) consider that there 'are few academic empirical studies that apply relationship marketing to the NPO sector'. One of these studies is by Bennett (2005) who found a link between the levels of market orientation, relationship marketing and client satisfaction in a study of

172 UK charities. Bennett (2005, p. 464) thus stated that ‘market orientation and the adoption of relationship marketing are forces for good in the helping and caring charity world, and thus need to be encouraged. Charity managers should be knowledgeable about these concepts and be competent to apply them in practice’.

Dependent upon the nature of the charity, it could be argued that relationship marketing is definitely important in regard to donor clients, but perhaps less important in regard to service recipient clients – especially if it is a charity that assists people to recover from illness. An interesting concept worth investigation is the potential conversion of service recipient clients, once ‘recovered’, to become donor clients.

2.4.4 Section Summary

There is a strong view that marketing is developing a service-dominant logic (Vargo & Lusch 2004a) irrespective of whether organisations are offering goods or services in the traditional sense. The marketing concept is regarded as being operationalised via a market orientation (Gainer & Padanyi 2005; Kohli & Jaworski 1990; Steinman *et al.* 2000; Van Egeren & O'Connor 1998), which in turn can be delivered with assistance of services marketing principles, of which relationship marketing is regarded as a component. A review of the literature has indicated that services marketing and the associated concept of relationship marketing have been extensively researched in recent decades albeit mainly in a for-profit context. Kinnell and MacDougall (1997, p. 13) regard relationship marketing is relevant as the ‘basis for successful marketing in the non-for-profit sector’. The review of literature regarding services marketing and relationship marketing has enabled various issues to be identified that inform the aspects of market orientation that will be analysed during the

field research component of this thesis. For example, how charities perceive and measure quality, development of the servicescape and internal marketing to assist in the introduction of a marketing discourse.

2.5 Chapter Summary

The marketing concept is regarded as being operationalised via a market orientation that, in turn, has been found to be associated with an improvement in organisational performance. In recent decades, vast amounts of research have been devoted to assessing not only what constitutes market orientation, but to also assess factors that can affect levels of market orientation. This research has been conducted in the for-profit arena moreso than in the not-for-profit arena.

Despite differences between the for-profit and not-for-profit sectors, it is regarded that marketing is relevant to both sectors despite the not-for-profit sector traditionally not using marketing. Researchers suggest market orientation is relevant to not-for-profit organisations and should be utilised to increase organisational performance.

A key gap identified in the review of literature is that no previous research has examined the affect on the organisation and its employees of introducing market orientation into a charity. This is therefore the subject of this thesis.

CHAPTER THREE : DISCOURSE

3.1 Chapter Outline

The thesis examines the introduction of a for-profit market orientation into a not-for-profit charity from a Foucauldian discourse perspective. Discourse has been utilised as it is a theoretical orientation that enables the drawing of richer meaning and a greater level of insights from in-depth interviews. Discourse is a meaning creation system and by using a discourse approach, the way in which charities and their employees changed what things meant, and how they were perceived as a market orientation was introduced, can be analysed. The change in discourse within the charity has enabled the employees to perceive their charity organisation and themselves in different ways. The resultant discourse is based on the actions of managers who exercise power to introduce new meanings that they aim to embed.

This chapter commences with an overview of marketing discourse and is followed by definitions of discourse and discourse production. Key aspects of discourse that are relevant to the research are then examined, namely discourse transformation and the concept of power/resistance within discourse. Issues of power and resistance are key aspects that management need to understand and appreciate when attempting to introduce marketing discourse into the existing discourse. Differences and similarities between for-profit and not-for-profit organisational discourse are identified as these issues have implications for the manner in which marketing discourse from the for-

profit arena can be introduced into a not-for-profit charity. The chapter finishes with a summary. An outline of the chapter is provided in Figure 3.1 below.

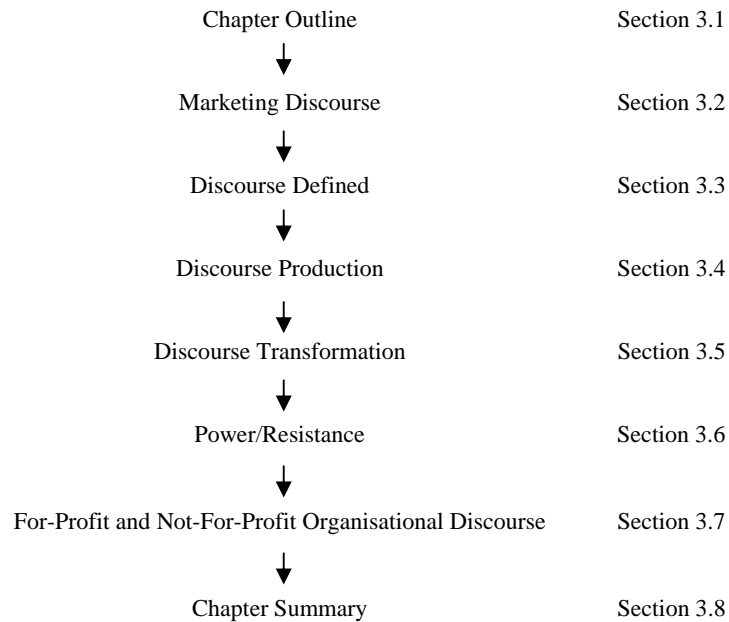


Figure 3.1 - *Outline of Chapter 3.*

3.2 Discourse Defined

This section provides a brief overview of discourse, indicating the views from various academics and outlines the Foucauldian perspective that is utilised in this thesis. A discourse can be regarded as a ‘set of sanctioned statements which have some institutionalised force’ (Mills 1997, p. 60) and thus have a strong influence on how individuals think and behave. Discourse involves interactions in both formal and informal settings (Brownlie & Saren 1997) and typically covers ‘all spoken and written forms of language use (talk and text) as social practice’ (Wood & Kroger 2000, p. 19), including visual images and graphics as text. Our attitudes, behaviour and perceptions

of reality are moulded by discursive practices and interactions in which we are involved and exposed (Berger & Luckmann 1967; Grant *et al.* 2001; Searle 1995).

Discourse is typically studied ‘as complex structures and hierarchies of interaction and social practice and their functions in context, society and culture’(van Dijk 1997a, p. 6). Discourse is not just language, but a form of social interaction, thus there is a need to interpret discourse as a ‘complete communicative event in a social situation’ (van Dijk 1997b, p. 164). Similarly, Wodak (1996, p. 15) regards discourse as ‘socially constituted, as well as socially conditioned’ and that it ‘constitutes situations, objects of knowledge, and the social identities of and relationships between people and groups of people’.

The term also has more sociopolitically oriented meanings, for example, ‘it is sometimes used to mean ...what is ... “sayable” ... about one or more topics within the constraints of a given time, place, or social, cultural, or institutional setting’ (Gee 2005a). This is typically referred to as the discourse context, for example, ‘as in such phrases as: “17th century discourse about women”, “the discourse of modern medicine”, “Enlightenment discourse”, or “the competing discourses of school reform emanating from business and educational research”’(Gee 2005a).

In the field of linguistics, discourse usually means language (oral or written) in use and commonly refers to ‘extended samples of either spoken or written language’ and is also applied to ‘different types of language used in different sorts of social situation’ (Fairclough 1992, p. 3). Examples of these situations include a ‘classroom’ discourse, a ‘medical consultation discourse’, and a ‘management discourse’. From another perspective, discourse is used in social theory and analysis as referring to ‘different ways of structuring areas of knowledge and social practice’ (Fairclough 1992, p. 3) and is typified by the work of Foucault who is perhaps the most widely discussed

and most influential researcher in the development of discourse theory (Alvesson & Kärreman 2000; Mills 1997).

Foucault (1972a, p. 49) regarded discourse as a shift from language to ‘practices that systematically form the objects of which they speak’, thus, discourse (sets of statements) constitute objects and subjects. Discursive structure can be determined due to systematic structure of ideas and concepts as well as the ways of thinking and behaving that formed in specific contexts (Foucault 1972b). In other words, a discourse is a system of meaning that is constrained and influenced by the context.

A Foucauldian perspective focuses on the production of meanings, the strategies of power and the generation of knowledge (Foucault 1978). Foucault suggested that there are four discourse ‘technologies’ (discourse practices), namely production, sign systems, power and self. Technologies of production ‘permit us to produce, transform, or manipulate things’ and discourse practices that enable construction of meaning are referred to as technologies of sign systems to ‘permit us to use signs, meanings, symbols’ (Foucault 1988, p. 18). Power determines ‘the conduct of individuals and submit them to certain ends or domination’ (Foucault 1988, p. 18) whilst self permits ‘individuals to effect ... a certain number of operations’ (Foucault 1988, p. 18). Coupled together, humans determine their world ‘within the context of a variety of discourses’ in which they may play differing roles (Motion & Leitch 2002, p. 49). Whilst Foucault’s research developed over time, the work tends to consist of three interlinked issues – namely discourse, power/knowledge and subjectivity.

Foucault’s (1980; 2000) key area of interest was in the mechanics by which one discourse becomes a dominant discourse, with power a key element. Thus, given that this thesis concentrates on examination of the introduction of a marketing discourse into

a charity discourse and examination of discourse transformation, the research has been informed predominantly by the work of Foucault.

3.3 Discourse Production

The marketing discourse is typically concentrated on maximising long-term value creation for shareholders whereas the traditional charity discourse is altruistic and related to obtaining donations and supporting service recipient clients. The two discourses involve two different ways of thinking. However, given the current environment in which charities operate, integrating appropriate aspects of market orientation discourse into the traditional charity discourse is suggested as offering a more relevant and competitive discourse for charities to utilise. It is possible that the introduction of the market orientation discourse onto a charity discourse will result in the traditional charity discourse becoming so changed (and thus unrecognisable from the original discourse) that a ‘transformation’ occurs. It is therefore appropriate to briefly discuss the manner in which discourse is produced.

To Fairclough (1992, p. 64), discourse ‘is a practice, not just of representing the world, but of signifying the world, constituting and constructing the world in meaning’. Discourses contribute to construction of social and corporate identities, construction of social relationships between people and construction of systems of knowledge and belief, i.e. the identity, relational and ideational functions of language (Fairclough 1992). The life of people, including employees of organisations such as charities can be ‘seen as interconnected networks of social practices of diverse sorts (economic, political, cultural, family, etc.)’ (Chiapello & Fairclough 2002, p. 193), with social

practice regarded as a ‘relatively stabilized form of social activity’ (Chiapello & Fairclough 2002, p. 193).

3.4 Discourse Transformation

Organisational change can be defined as ‘new ways of organizing and working’ (Andriopoulos & Dawson 2009, p. 14) and a discourse transformation can be regarded as having occurred if ‘as a result of discursive struggle, discourse participants come not only to act differently but also to understand or “know” the world differently’ (Motion & Leitch 1996, p. 299) and as a result, the sociocultural practice, attitudes and values supporting it are transformed. Thus, in regards to this thesis, a discourse transformation can be considered to have occurred within any of the analysed charities if the employees are discovered to act differently and view the world differently than they did in the previous discourse operating within their charity organisation.

Discourses operate in various institutions, including within schools, academic disciplines, families, communities, business and government. They ‘are always in permanent dispute’ (Clegg *et al.* 2006, p.233), constantly change and can be contested, resisted or transformed by various discourse actors (Hardy *et al.* 2000; Hardy & Phillips 1999). Thus, a discourse transformation can ‘emerge out of the discursive struggles engaged in by competing institutions and groups over socio cultural practices’ (Motion & Leitch 1996, p. 297) and typically result in creation of new rules (Foucault 1972a). Discourse is used not just to stabilise social relations, but can simultaneously be used to enable social change (Clegg *et al.* 2006, p. 303).

Typically, a ‘dialectic of negotiation’ (Titscher *et al.* 2000, p. 145) will occur to determine what is acceptable and development of the new discourse results from actors considering various options and ultimately determining from these what ‘will be acceptable’ (Foucault 1980, p. 197). The boundary of a specific discourse is often somewhat unclear and actors (employees) ‘draw on different discourses in their texts to try to fix understandings, shape interpretations, and justify practices in ways that are commensurate with their interests’ (Maguire & Hardy 2006, p. 10). Even though parts of a former discourse may remain, ‘the underlying systems of thought and discourse rules are changed’ (Motion & Leitch 2007, p. 264).

This is the crux of this thesis. When a marketing discourse is introduced into a charity discourse, the actors in the discourse, namely the employees of the charity (divided into managers and their direct reports) will wrestle with the new meanings introduced by the marketing discourse, and over-time determine what ‘will be acceptable’ (Foucault 1980, p. 197) from the new marketing discourse and from the old charity discourse, resulting in formation of a new discourse following a discourse transformation. The organisational implications are that management needs to ensure that they introduce their changes in such a way that what they desire to be accepted by employees is in fact accepted, otherwise they could fail in their attempts at organisational change.

The term ‘discourse colonisation’ refers to when ‘the discourse of one domain is applied to another in an attempt to change the construction of meaning within the colonized discourse’ (Motion & Leitch 1996, p. 299). A ‘legacy’ discourse refers to the old/former discourse once a new discourse has developed. Actors attempting to increase the impact of a new discourse not only promote the new discourse but ‘produce texts that reconcile it with legacy discourses’ (Maguire & Hardy 2006, p. 23). Typically, a

new discourse may not neatly replace a legacy discourse, but will ‘overlap and interact’ but is positioned as ‘superior to the legacy discourse’ (Maguire & Hardy 2006, p. 24). Thus, in this thesis, it is likely that the charity (legacy) discourse will become colonized by the (new) marketing discourse, or all least by components of a marketing discourse.

Whilst some discourses remain relatively stable over time, there are occasions when transformations (of varying extent) occur rather rapidly. Foucault (1980, p. 112) suggests these changes are a sign of ‘a modification in the rules of formation of statements which are accepted as scientifically true’ and that it ‘is a question of what *governs* statements, and the way in which they *govern* each other so as to constitute a set of propositions which are scientifically acceptable’. If a specific recognisable discourse influences another existing discourse, the boundaries of the existing discourse may be widened. Likewise, a discourse may split into two or more discourses, or more than one discourse may merge together (Gee 2005b, p. 30). The newly transformed discourse does however need to be similar enough to other similar performances to be recognisable. Transformations of existing discourse ‘occur within a set of historical conditions, attempt to establish new concepts and new meanings for existing concepts, and determine a complex set of power relations’ (Motion & Leitch n.d.). Similarly, various acts and texts can be deliberately utilised to ‘disrupt and shift the underlying discourse’ (Zandee & Bilimoria 2007, p. 471).

Fairclough (1992, p. 97) suggests that evidence of a potential discourse change ‘leaves traces in texts in the form of co-occurrence of contradictory or inconsistent elements – mixtures of formal and informal styles, technical and non-technical vocabularies, markers of authority and familiarity ...’ and that if a discursive change progresses, ‘what at first are perceived by interpreters as stylistically contradictory texts come to lose their patchwork effect and be seamless’. These are key issues that

management needs to be aware of when attempting to introduce change. Similarly, Foucault (1991) considers that examination of the language utilised within a discourse, and change from one language to another can be regarded as evidence of a discourse transformation.

Whilst discourses can change over time, at ‘any particular point in historical time and in any social and spatial location, actors will be faced with a set of *institutionalised* economic, political and cultural constraints that will limit the range of strategic and tactical discursive options available to them’ (Reed 2004, p. 416). This will thus potentially place constraints of various types on the speed, extent and manner with which management can attempt to introduce change. Likewise, Foucault (1980, p. 206) contends that ‘in order for a certain relation of forces not only to maintain itself, but to accentuate, stabilise and broaden itself, a certain kind of manoeuvre is necessary’. Thus, strategy by someone is required to bring about discourse transformation. Usually it is management of an organisation that introduces change. To assist smooth discourse transformation, ‘articulation’ is typically utilised by management. The concept of articulation, developed by Hall (1996), is the form of connection that can unite two elements under specific conditions. The linkage is not necessary or essential for all time and the question to ask is what circumstances enable a connection to be made. Hall’s theory of articulation conceptualises how ‘people knit together disparate and apparently contradictory practices, beliefs, and discourses in order to give their world some semblance of meaning and coherence’ (Trimbur 1993). Therefore, examination in this thesis of the manner in which management have attempted to bring about a discourse transformation is a key issue.

Foucault (1991, pp. 56-57) lists four criteria for identifying discourse transformations, namely ‘displacement of discourse boundaries’, ‘the new position and

role' of the speaking subject, the 'new mode of functioning of language', and 'circulation' of the discourse. Given that this thesis involves examination of introduction of a marketing discourse into a charity discourse and the analysis of discourse transformation, the approach of Foucault offers a useful framework to examine discourse transformation and is thus adopted and utilised in this thesis.

3.5 Power / Resistance

The previous section illustrated that discourse is not stable, but can change over time due to various factors. A key issue that can be involved in enabling discourse transformation to occur is the aspect of power, which can also lead to potential resistance from employees. Thus, if management of an organisation attempts to utilise their delegated power to introduce change, there may be resistance from the employees. This section thus examines issues of power and resistance which are crucial areas for management to appreciate and understand when attempting to introduce organisational change.

Foucault (1981, pp. 52-53) suggests that 'discourse is not simply that which translates struggles or systems of domination, but is the thing for which and by which there is struggle'. Thus, power is regarded as embedded in knowledge, with any knowledge system regarded as a system of power (Foucault 2000) and the 'power to control discourse is seen as the power to sustain particular discursive practices with ideological investments in dominance over other alternative (including oppositional) practices' (Fairclough 1995b, p. 2). Similarly, Mumby & Clair (1997, p. 184) suggest discourse 'produces, creates, and challenges existing power relations'.

Power basically ‘means relations, a more-or-less organised, hierarchical, co-ordinated cluster of relations’ (Foucault 1980, p. 198) and that ‘relations of power are interwoven with other kinds of relations (production, kinship, family, sexuality) for which they play at once a conditioning and a conditioned role’ (Foucault 1980, p. 142). An individual has the ability to influence another person’s behaviour (Raven & Rubin 1976) with French and Raven (1960) considering that there are five forms of power – coercive power, reward power, legitimate power, referent power and expert power. Thus, various forms of power can exist within an organisation and management needs to determine the appropriate mix of power types (that they can introduce and control) to utilise when attempting to introduce change.

Power is typically ‘accomplished through talk’ (Pfeffer 1997, p. 148) and for power to be exercised, it has ‘to be able to gain access to the bodies of individuals, to their acts, attitudes and modes of everyday behaviour’ (Foucault 1980, p. 125). Mumby (1988) suggests power is a structural issue and the product of, and the process by which members engage in organisational activity with van Dijk (2003) regarding social power as control. A way to determine ‘who has power is to observe who benefits’ (Pfeffer 1992, p. 59). Thus, in an organisational environment, people have power if they can control the behaviour and minds of others within the organisation. This assumes a base of power based on aspects such as privileged access to resources such as money, status, knowledge and information. Power is typically exercised subtly and is most effective when those affected by power interpret the world from the point of view of those with the power – with the power ultimately being exercised via consent rather than coercion (Mumby & Clair 1997). Power achieved via consent is done via a process of ‘hegemony’ (Gramsci 1971).

Foucault (1980) was interested in the mechanics by which one discourse became a dominant discourse, with power thus a key element in discourse. A Foucauldian discourse approach contends that power resides in a network of relationships (Foucault 1980) that depend on the 'production, accumulation, circulating and functioning of discourse' (Foucault 1980, p. 93). Thus, power and discourse are interdependent because discourse produces the concepts, objects and subjects shaping power, and power influences discourse production (Foucault 1972b, 1980; Hardy & Phillips 2004). Whilst Foucault (1980, p. 121) considers that 'the West has insisted for so long on seeing the power it exercises as juridical and negative rather than as technical and positive', he regards power as positive and 'needs to be considered as a productive network which runs through the whole social body, much more than as a negative instance whose function is repression' (Foucault 1980, p. 119).

Foucault (1980) regarded power and knowledge as inseparable, with individuals and organisations using various discourse strategies to conform with, circumvent or challenge existing power/knowledge relations. Knowledge is thus 'both a creator of power and a creation of power' and power is 'both a creator of knowledge and a creation of knowledge' (Motion & Leitch 2007, p. 265). Thus, this perspective regards discourse as offering the means via which power/knowledge circulates, and discourse strategies as the means to enable the relations of power/knowledge to be created, maintained, resisted or transformed (Davenport & Leitch 2005).

Power within an organisation is exercised 'through the discourse of its members' (Mumby & Clair 1997, p. 183), with discourses being 'the object and site of struggle' and 'the site of constant contestation of meaning' (Mills 1997, p. 16) with entry into a discourse 'inextricably linked to questions of authority and legitimacy' (Mills 1997, p. 51). Membership into a specific discourse carries 'opportunities and restrictions,

unwritten rules about which ideas are acceptable for debate or discussion and which ones taboo. Prohibitions and permissions permeate the discourse of institutions and determine what can be said, seen, heard and visualized by members' (Fulop *et al.* 2004, p. 482). Thus, management needs to appropriately influence the discourse operating within the organisation via considered interventions either directly or indirectly to control the direction of the discourse. In attempting to introduce a marketing discourse, management would thus need to make considered judgements regarding when and where within the organisation to introduce aspects of marketing – and do so in a manner such that the aspects of marketing introduced are accepted by the employees.

Legitimacy is a key concept in how discourse participants try to influence a discourse (Habermas 1979) and ideally involves compromise of interests (Habermas 1973) with development of discursive legitimacy being a power struggle aimed at keeping 'dominant meanings in place' (Hardy & Phillips 2004, p. 307). In an organisation, management typically have formally legitimated power but informal power can also exist with organisations becoming 'sites of struggle where different groups compete to shape reality of organizations in ways that serve their own interests' (Mumby & Clair 1997, p. 182). Thus, despite management attempting to institute their legitimated power, employees may attempt to resist.

Associated with the concept of legitimate power is the perspective of van Dijk (1993, p. 249) who focuses on '*the role of discourse in the (re)production and challenge of dominance*' and contends power involves control and changing '*the mind of others in one's own interests*' and is essentially a function of text and talk (van Dijk 1993, p. 254). Hence, managers can exert their power within an organisation based around both written and verbal communication. This view is similar to Hardy (2001, p. 28) who emphasises dominance can be achieved by appropriate communication, namely

dominance 'is an ongoing struggle among competing discourses, continually reproduces or transformed through day-to-day communicative processes'.

Participant positions and roles are a key issue in legitimising power with positioning being 'an important concept in considerations of the way in which people are both producers of and produced by discourse' (Wood & Kroger 2000, p. 101). As defined by Wood and Kroger (2000, p. 100), positioning 'refers to the constitution of speakers and hearers in particular ways through discursive practices, practices that are at the same time resources through which speakers and hearers can negotiate new positions'. An agent/patient duality can exist. If someone is positioned as an *agent* they have assigned responsibility/blame/credit for their actions (e.g. managers within an organisation) but if positioned as a *patient* then 'responsibility can be deflected' (e.g. employees simply doing what their managers have told them to do) (Wood & Kroger 2000, p. 101). Agency is linked with power and there are two major dimensions of power, 'namely through the enactment of dominance in text and talk in specific contexts, and more indirectly through the influence of discourse in the minds of others' (van Dijk 1993, p. 279).

Thus, power is a key issue in formation of discourse and what is regarded as truth (Clegg *et al.* 2006). Truth is 'a system of ordered procedures for the production, regulation, distribution, circulation and operation of statements' (Foucault 1980, p. 133). It is 'linked in a circular relation with systems of power which produce and sustain it, and to effects of power which it induces and which extend it' (Foucault 1980, p. 133). The ultimate discourse which develops is based on the exertion of power by actors in a discourse, with the new discourse and way of seeing the world becoming the new truth for that specific discourse.

3.6 For-Profit and Not-For-Profit Organisational Discourse

The meanings that dominate in for-profit versus not-for-profit discourses differ. Utilising Foucault's framework (1991) for discursive formations, a for-profit discourse is economically driven and is based around profit and loss considerations. On the other hand, a not-for-profit discourse tends to be socially oriented and thus based around 'helping' people who have a generally less than optimum life situation. The not-for-profit discourse aims to assist people who, for various reasons, are not in a position to gain adequate social requirements including food, clothing and shelter via the for-profit discourse within society and/or via government assistance.

In a for-profit discourse with an economic imperative, the key stakeholders are predominantly the owners of the organisation hence there are specific rules regarding how the revenue generated should be utilised. Thus, in operationalising a for-profit discourse, the over-riding consideration is the financial return to the organisation's owners with all aspects of the operations being based around this imperative. This is in contrast to the not-for-profit discourse that has different key stakeholders – namely the service recipients who are regarded as the number one stakeholders.

In regards to the 'position and role occupied by the speaking subject' (Foucault 1991), in a for-profit discourse the employees' position is generally to represent the company and satisfy clients needs, but from an underlying profit perspective for the organisation. The employee is not likely to provide services if the long-term interests of the company are not maintained. This contrasts with a traditional not-for-profit service provider who, due to their compassionate and caring nature is likely to treat service recipient clients with little if any regard for the financial cost implications for the

organisation. The assumption most service providers have is that the not-for-profit organisation will find the money from somewhere.

The 'language' (Foucault 1991) utilised within the two discourses differs as well. A for-profit discourse will utilise the language of business such as 'key performance indicators, strategic planning' with financial terms such as 'cost of goods, mark-up, profit margin' being utilised to measure and determine the price at which to sell products. This business language is somewhat foreign in a not-for-profit discourse.

Within this comparison of for-profit and not-for-profit discourse, the literature suggests that the marketing concept developed in the for-profit sector is transferable to the not-for-profit sector (Andreasen & Kotler 2008; Sargeant 2005, 2009), but the various differences and similarities between the discourse within each sector needs to be identified and examined when considering the transfer of marketing to the not-for-profit sector. The following sections list these key differences and similarities.

3.6.1 Marketing Differences

Sargeant (2005, p. 2) considers that 'although many of the tools and techniques commonly used in commercial marketing practice are indeed equally applicable to the nonprofit realm, the ethos that drives their application can be radically different'. In other words, different discourses operate in the for-profit versus not-for-profit arenas – with the economic versus social perspectives respectively influencing the activities. Whilst marketing is increasingly relevant for not-for-profit organisations to assist the organisations to achieve their goals, the overall lack of use of marketing is exemplified by comments from Andreasen and Kotler (2003) who consider most not-for-profit organisations are not customer centred due to minimal use of customer research, with

marketing being perceived by many of the organisations as basically only promotion, and with use of a single strategy rather than segmentation and a lack of knowledge of generic competition. In other words, the typical not-for-profit discourse is not market oriented.

Whilst not-for-profit organisations share various characteristics with for-profit organisations, they have unique characteristics that require different marketing strategies (Conway 1996). Similarly, Sullivan Mort, Weerawardena and Carnegie (2003, p. 80) consider not-for-profit organisations have ‘unique organisational characteristics ... which make them different from their commercial counterparts’. Kotler and Levy (1969) suggest that not-for-profit organisations sell a broader product than for-profit organisations. That is, not-for-profit organisations typically ‘sell’ a service/intangible product associated with ultimate social benefits and occasionally also a tangible product. Whilst both for-profit and not-for-profit organisations can sell both tangible and intangible products, the key underlying aspect of the for-profit discourse is the motivation to make an economic profit for the key stakeholders (organisational owners) whereas the key motivation of the not-for-profit discourse is the aim of providing social behaviour/benefits.

Some key differences between for-profit organisations and not-for-profit organisations that need to be considered when transferring for-profit based marketing principles to the not-for-profit context include –

1. *Exchange* – Traditional marketing is based around the concept of exchange theory. Clarke and Mount (2001) contend that exchange theory is not relevant in the not-for-profit context and suggest a one-way transfer model is appropriate. For this reason, they also suggest that traditional marketing concepts need appropriate modification to be of use in the not-for-profit context. Investigated

in this thesis is the possibility that donor clients are involved in exchange, whilst service recipient clients, if receiving a product free of charge are in a one-way transfer – thus both models need to be adopted in tandem. Donor clients to charities may require something in exchange, such as invitations to gala events (Kottasz 2004). In regards to exchange with service recipient clients, not-for-profits ‘provide some form of exchange that results in increased social value’ (Sullivan Mort *et al.* 2003, p. 80). In a for-profit discourse, the concept of exchange is paramount in the eyes of the employees of organisations, they will not provide a product to a client unless they are assured of gaining a (usually) monetary reward in return. In a not-for-profit discourse however, the underlying aspect of the employees is helping service recipient clients, providing them with assistance, and such employees do not think about what the client needs to provide the organisation in return.

2. *Product* - In relation to ‘Product’ in the traditional “4P’s” or “7P’s” of marketing, product in a not-for-profit setting is ‘more complex than the traditional product of a for-profit organisation’ (Kinnell & MacDougall 1997, p. 27). ‘Physical goods’ (e.g. food, clothing, furniture) may be sold for fund-raising or given free or at subsidised rates to service recipient clients. ‘Intangible services’ offered by charities may include emotional and informational support as well as guidance and ‘Ideas’ may also be offered. In other words, both for-profit and not-for-profit discourse can involve products that are either goods and services. However, the circumstances of provision are typically different – with provision based on a social perspective in the not-for-profit discourse.

3. *Employees* - Unlike the majority of for-profit organisations that generally employ paid staff, not-for-profit organisations often employ both paid staff and volunteers. This issue can have implications for management of not-for-profit organisations in regards to the motivation of volunteer staff. Also, the level of staff turnover is a growing problem for not-for-profit organisations (Bennett 2007). Based on the underlying discourse, employees within a traditional not-for-profit discourse setting will have different motivation than employees within a for-profit discourse setting. Employees working for traditional not-for-profit organisations typically choose to do so not just for the remuneration, but for the added personal satisfaction in being able to assist service recipient clients from a social perspective, whereas employees operating in a for-profit discourse have less consideration for clients wellbeing.
4. *Revenue / Resources* - Charities generally receive funding from a variety of sources including donations (individual and corporate), sales of items (for example - ribbons, pens, cards, second hand clothing etc.) and public funds/grants. Often, services to service recipient clients are provided either free-of-charge or at a nominal cost (Bennett & Sargeant 2005). Fund-raising is a key component of charity activity and although fund-raising is only one component of marketing, it is often managed separately (Abdy & Barclay 2001). For-profit organisations also attract resources/operating funds via sale of shares but this does not happen in the not-for-profit sector, although there is increasing consideration being given to use of 'social investment' fund sources (Kingston & Bolton 2004). Drucker (1996, p. 5) considers a key to success for not-for-profit organisations is innovation, 'not just by creating new services, but by

finding new ways to make money, by finding new ways to keep and attract new volunteers....’

5. *Customers* - A key difference between for-profit and not-for-profit organisations is the ‘dual constituency’ of not-for-profit organisations – ‘the [service recipient] clients for whom the charity exists to benefit and the donors without whom the charity would not exist’ (Kinnell & MacDougall 1997, p. 147). Similarly, Shapiro (1973) divides customers of not-for-profit organisations into two groups – ‘donors’, and ‘beneficiaries’. Sargeant (2005) considers that charities have five customer groups – volunteers, individual donors, corporate donors, charitable trusts and recipients of goods/services. The importance of maintaining strong relationships with donors over time is paramount – thus, relationship marketing principles can play a key role.

Segmentation can play a role in assisting the targeting of potential donors. Charities tend to have two target groups – existing and potential new *donor clients* who provide finance and goods-in-kind, and existing and potential new *service recipient clients* who receive goods and services from the charity. The average annual amount each Australian adult donates is \$15 (Date 2007). As indicated by Balabanis, Stables and Phillips (1997, p. 584) resources ‘are generated from the donor market and subsequently are allocated to the beneficiary market’. Ni (2007) suggests that ‘non-profit fundraisers should realise that they are in a “feel good” industry ... ’ and should ‘focus on how you make your donors *feel*’. In a study of US based not-for-profit organisations, Foster and Fine (2007) determined that organisations generally became large if they obtained the majority of their money from a single funder and there was a natural match to their mission and beneficiaries. Recent research in Australia

suggests there is a tendency for organisations to view donations to not-for-profits as an increasingly strategic corporate issue (Noble *et al.* 2006).

6. *Market / Competition* – In 1997, Balabanis, Stables and Phillips (p. 586) conducted an analysis of market orientation of 200 British charities and stated ‘charity organisations tend to see other charities not as competitors but as fraternal organisations working in the same general spheres’. Since then, it could be argued that the environment has changed and that there is now competition amongst charities. That is, charities compete against all other charities for donations from donor clients, and also compete for service recipient clients against other charities offering similar services, although, unlike the for-profit arena, the best outcome is for service recipient clients to receive their requirements no matter which charity provides it.

Information is a key tool in assisting organisations to address the market. Brennan and Brady (1999) consider that many not-for-profit organisations lack marketing information regarding the specific details of potential donor clients. Hems (1999, p. 101) considers ‘competition between charities is about influencing the giver’s specific choice’. Abdy and Barclay (2001, p. 224) consider there has been an ‘emergence of explicitly competitive strategies in charity fund-raising’ in the last decade. A UK study has indicated that both profit and not-for-profit organisations had similar inclination to develop marketing plans, but the ‘plans of the non-profit sector showed marked idiosyncrasies’ (Cousins 1990, p. 26) and had a more tactical bias. The internet is a key tool for marketers in attempts to stand out from competition. Research by Wenham, Stephens and Hardy (2003, p. 215) suggests not-for-profits are not using the internet as well as the commercial sector, resulting in the comment

that not-for-profit organisations ‘still seem to lack customer orientation ...’. Abdy and Barclay (2001, p. 215) consider that ‘competition between charities for the public’s support has intensified. Donors are said to be tired of receiving so many approaches, from so many similar causes’ and similarly Sullivan Mort, Weerawardena and Carnegie (2003, p. 77) state that there is ‘growing competition for donors’. The concept of competition is definitely relevant to charities when pursuing funds (from donor clients), but is perhaps less relevant when providing services to service recipient clients (i.e. the traditional charity discourse ethos of non-competition may still apply). In other words, different discourse orientations are relevant.

7. *Board of Directors* - Unlike most boards of for-profit organisations, not-for-profit organisations have a board of unpaid trustees. These trustees typically volunteer to serve, not necessarily due to their qualifications, but due to a personal interest in the organisational cause. Thus, although their heart may be in the right place, they perhaps lack the appropriate qualifications required to assist the not-for-profit organisation to operate in an effective manner, resulting in an increased reliance on the qualifications of the senior management. Not-for-profit organisations vary in size, some ‘are small and still controlled by charismatic founders who often have limited management experience’ (Andreasen & Kotler 2003, p. 5). The lack of appropriate business expertise amongst Directors is however currently changing in response to general community concerns for more efficiency within charity organisations and increased pressure from key stakeholders such as potential Government funding bodies and major corporate donors. Often, for promotional potential, organisations also recruit high-profile patrons (Date 2007).

8. *'Profit' / Performance* – Whilst the general goal of for-profit organisations is to make money, the general goal for not-for-profit organisations is to generate sufficient funds to enable fulfilment of organisational objectives such as assisting service recipient clients as best they can. Mottner and Ford (2005, p. 830) have suggested that '... a nonprofit organisation's performance should be evaluated in both financial and nonfinancial terms'. Performance of not-for-profit organisations is difficult to measure (Shoham *et al.* 2005; Shoham *et al.* 2006). Efficiency, growth, customer orientation and quality are the key performance measures typically used in scholarly publications to measure both for-profit and not-for-profit organisational performance (Baruch & Ramilho 2006). Whilst for-profit discourse is ultimately based around economic aspects, not-for-profit discourse is based around social good. It is easier to measure the performance of a for-profit organisation than it is for a not-for-profit organisation. Managers of not-for-profit organisations often find it difficult to develop precise quantitative measures of performance.

Silverman and Taliento (2006, p. 37) consider that business leaders 'all too ... often underestimate the unique challenges of managing nonprofit organisations' because there are 'critical differences' (p. 37) between for-profit and not-for-profit organisations. Comments they received from executives who had been involved in both for-profit and not-for-profit organisations included - 'it's harder to succeed in the nonprofit world' (p. 37), 'nonprofits also lack straightforward performance measures ...' (p. 38), 'the nonprofit sector is underfunded, understaffed, under-resourced, and undertrained' (p. 38), 'in the nonprofit sector there's much more reliance on the leader, and less developed teams and talent underneath' (p. 41) and 'corporate partners often don't

realise that nonprofits lack management, marketing, and communications expertise and personnel' (p. 43). Also, there can potentially be an anti-marketing bias in not-for-profit organisations due to the underlying philosophy (Bennett 1998b; Bennett *et al.* 2008) of a need to concentrate on core activities and not marketing.

A telling comment is offered by Vredenburg (cited by Silverman & Taliento 2006), who suggests 'every time we in nonprofits satisfy customers, we drain resources, and every time for-profits satisfy a customer, they get resources back. That sounds very simply, but it has huge implications, and I don't think the for-profit people really get that' (when they move into not-for-profit leadership). In other words, employees used to a for-profit discourse oriented around economic aspects have difficulty not only understanding the operational perspective of not-for-profit organisations, but have different subject positions than employees in a not-for-profit discourse. Thus, when employees transfer from a for-profit to a not-for-profit discourse they need to appreciate the different subjects positions of the other employees.

3.6.2 Marketing Similarities

Despite the distinct differences between the for-profit and the not-for-profit sector that obviously need to be considered, there are also numerous similarities in marketing in both sectors. For example, customer orientation is required, exchange theory (benefits equal or exceed perceived costs for donor clients) are relevant, marketing research should be utilised, audiences should be segmented, all "P's" of marketing are needed and results should be measured for improvement (Kotler *et al.* 2002).

Segmentation, a key concept in for-profit marketing, is considered appropriate by Masters (2000) when hunting potential donors and utilisation of the customer lifetime value (Miller & van Wyk 2000) concept is also suggested. Similarly, use of customer relationship marketing (CRM) databases have potential to assist charities to re-activate lapsed donor clients (Aldrich 2000) whilst service blueprinting can help manage donor client exchanges (Polonsky & Garma 2006).

The need to gain information is paramount for successful marketing. Parasuraman, Berry and Zeithaml (1991a, p. 39) consider that 'the key to providing superior service is understanding and responding to customer expectations'. Competitor analysis (CA) is also a key aspect in marketing strategy within the for-profit arena. In an analysis of UK charities, Bennett (2003, p. 343) found that 'charities in the sample had begun to emulate the attitudes and behaviour of their counterparts in the commercial sector insofar as competitor analysis was concerned. However, they did not seem to have employed competitive analysis effectively'. Also, 'relatively few resources were spent on the function ...' (p. 343) and 'CA has not been well-managed in the charity sector ...' (p. 344) and very few charities 'bothered to disseminate competitor information throughout the organisation, or regularly discuss such information in management meetings ...' (p. 344).

The concept of providing value to customers is ingrained within marketing theory. It is suggested by Little (2004, p. i) that there are 'six approaches to creating and delivering customer value ...' and that the 'approaches are not mutually exclusive ...' but characterise approaches 'practiced in various contexts ...'. There is perhaps an argument that some service recipient clients of charities are somewhat desperate to receive the service of a charity and may not worry too much about considering whether

they receive ‘value’, particularly when the majority of services provided by charities are free of charge.

Issues of competition, barriers to entry, brand awareness and target segmentation, all commonplace in the for profit sector, are also relevant in the not-for-profit sector. For example, a successful brand awareness strategy can make a charity brand ‘become synonymous with a cause’ and growth of some ‘powerful charity brands has created barriers to entry for other charities’ (Abdy & Barclay 2001, p. 224). Also, small charities can counter large charities by concentrating on niche ‘local appeal’ (Abdy & Barclay 2001, p. 225). Similarly, not-for-profit organisations are often affected by ‘image spillover’ whereby the ‘public perception of an individual nonprofit is determined by the average image of all similar organisations’ (Ritchie *et al.* 1999, p. 29). Sargeant and Hilton (2005, p.3) contend that in an effort to attract legacy gifts, communications by charities to potential donor clients ‘should stress organisational performance and service commitments’. In other words, a strongly operating charity is likely to gain more donations than a poorly operating charity – hence the need for a high level of market orientation.

Another aspect of traditional for-profit marketing relevant to charities is cause-related marketing – where a for-profit organisation assists a not-for-profit organisation by giving a portion of profits or sales to the cause. Cause-related marketing is highly relevant to both for-profit and not-for-profit organisations as both are required for such a concept to operate. Research is inconclusive as to which gender is more receptive to cause related marketing (e.g. Chaney & Dolli 2001; Kropp *et al.* 1999).

3.6.3 Marketing versus Charity Discourse

As indicated in Section 3.6.1 and Section 3.6.2, there are key differences and similarities between for-profit and not-for-profit organisational discourses and these are under-pinned by the dominating aspect of each discourse - for-profit discourse is driven by economic considerations and typically based on financial measures whereas not-for-profit discourse has a social perspective.

Specifically in relation to a for-profit marketing discourse, such a discourse is characterised by attention to the dimensions of market orientation (emphasis on customer, importance of information, interfunctional coordination and taking action) with a strong economic focus on exchange of a product for money with the ultimate goal of looking after the shareholders' interests. The discourse typically involves paid employees in an organisation that is controlled by a board of directors, with a focus on profit against a range of competing organisations.

This can be contrasted with a traditional charity discourse that can be considered to involve a typically volunteer workforce operating with a low budget on a somewhat informal basis to offer whatever assistance (typically free of charge) they can to people needing help who are often regarded as objects of pity and dependent on others. The afflicted person is 'positioned as an object of pity with an expectation that they should be grateful for what is being done for them' (Brown R 1997, p. 168) and this position is also utilised in promotional activities to appeal to the social conscience of the community to gain donations in order for the charity to operate.

The differences between the for-profit and not-for-profit sectors, as well as the specific differences between a for-profit marketing discourse and charity discourse,

signal potential issues that managers of charities need to take into consideration when attempting to introduce market orientation into their charity organisations.

Discourses form the concepts, strategies and objects, and the for-profit discourse has a more economic over-riding logic, whereas the charity discourse has an over-riding social aspect. However, they are not mutually exclusive. Hence the examination in this thesis of introducing a market orientation (from the for-profit arena) into a charity discourse (from the not-for-profit arena) with the aim of improving the overall performance of the charity organisation.

3.7 Chapter Summary

Given that this thesis examines market orientation from a discourse perspective, this chapter defined discourse and examined aspects of discourse production, and discussed in detail discourse transformations and the role that power and resistance have in forming a new discourse. These issues were highlighted, as they are key issues that managers need to be aware of, and take into consideration when attempting to conduct a transformation within their organisation. The information informs the subsequent thesis research that specifically relates to examining discourse transformation within charities as a marketing discourse is introduced.

Whilst marketing is considered relevant for both for-profit and not-for-profit organisations (Andreasen & Kotler 2008; Sargeant 2005, 2009), the unique differences between the for-profit and not-for-profit sectors in the broad, and specifically for-profit marketing discourse and traditional charity discourse, suggest transference of marketing developed in the for-profit sector directly into the not-for-profit sector may not occur

smoothly. It is likely that, whilst a not-for-profit organisation can change and utilise marketing, there can be expected to be specific aspects of the not-for-profit organisation that will require adjustment of any marketing utilised.

The following chapter details the research design utilised to conduct the thesis research.

CHAPTER FOUR : RESEARCH DESIGN

4.1 Chapter Outline

The chapter commences with an overview of the research design process and then indicates the specific research design to be utilised for this research. Based on the chosen research design, details of the subsequent case study methodology and the data collection and thematic analysis method utilised in the research are then discussed. Research quality is a key issue in all research, thus the manner in which quality has been maximised in the research is addressed and is followed by the procedures carried out to ensure the research was conducted ethically. A summary of the research rationale and framework being utilised to achieve the aim of this research is then presented. An outline of the Chapter is contained in Figure 4.1 below.

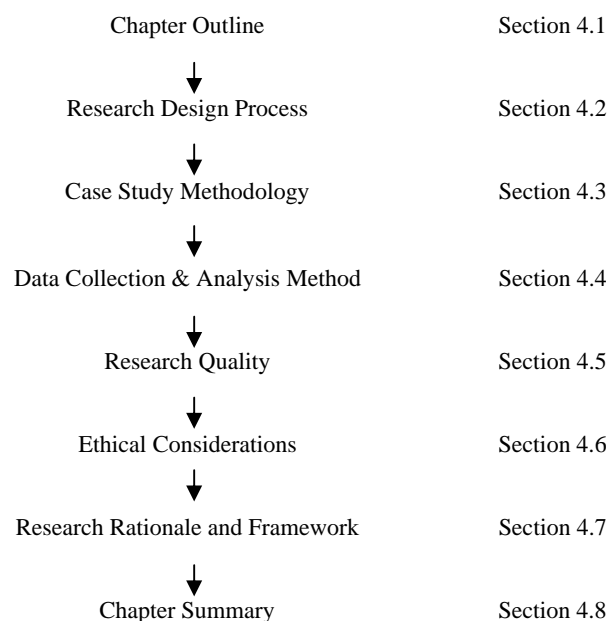


Figure 4.1 - Outline of Chapter 4.

4.2 Research Design Process

Generally, any research design will have its inherent advantages and disadvantages in relation to the specific research purpose, with arguably no one design being regarded as perfect. Thus, there is a need to determine the most appropriate design dependent upon the specific research issue (Blaxter *et al.* 2003; Gummesson 2001; Hussey & Hussey 1997; Lukas *et al.* 2004; McCrae 2005). A number of inter-related stages are involved in selection of research design (Crotty 1998; Sarantakos 1998). Crotty (1998) suggests that four stages should be considered when developing a research design, as indicated in Figure 4.2 below. First, an appropriate epistemology is selected, which then leads to selection of an appropriate theoretical perspective, followed by selection of methodology then selection of methods to collect and analyse data.

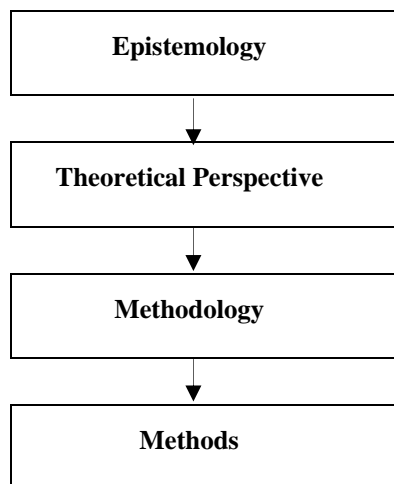


Figure 4.2 – *Four Stages in Research Process* (Adapted from Crotty 1998, p. 4).

Definitions of the terms used by Crotty in Figure 4.2 above are indicated in the column on the left hand side of Table 4.1 overleaf. Crotty refers to epistemology, i.e. ‘*what it means to know*’ (Crotty 1998, p. 10) but acknowledges he does not directly

refer to ontology, the nature of reality, i.e. ‘*what is*’ (Crotty 1998, p. 10) whereas other literature does. Crotty considers this is quite appropriate as ‘ontological issues and epistemological issues tend to emerge together’ (Crotty 1998, p. 10).

Table 4.1 – Definitions of Stages in Research Process (Crotty 1998; Sarantakos 1998).

Crotty perspective	Sarantakos perspective
Epistemology ‘the theory of knowledge embedded in the theoretical perspective and thereby in the methodology’ (Crotty 1998, p. 3)	Paradigm ‘a set of propositions that explain how the world is perceived’ (Sarantakos 1998, p. 31)
Theoretical perspective ‘the philosophical stance informing the methodology and thus providing a context for the process and grounding its logic and criteria’ (Crotty 1998, p. 3)	
Methodology ‘the strategy, plan of action, process or design lying behind the choice and use of particular methods and linking the choice and use of methods to the desired outcomes’ (Crotty 1998, p. 3)	Methodology ‘a model, which entails theoretical principles as well as a framework that provides guidelines about how research is done’ (Sarantakos 1998, p. 32)
Methods ‘techniques or procedures used to gather and analyse data related to some research question or hypothesis’ (Crotty 1998, p. 3)	Methods ‘the tools or instruments employed by researchers to gather empirical evidence or to gather data’ (Sarantakos 1998, p. 32)

Compared to Crotty who suggests four stages, Sarantakos (1998) suggests three stages in the research process, commencing with selection of an appropriate paradigm, leading to selection of research methodology then selection of methods of data collection and analysis, as indicated in the right hand column of Table 4.1 above). The commonality between both models is method and methodology. The differing perspective is Crotty offering epistemology and theoretical perspective, which Sarantakos simply combines into ‘paradigm’. Potential options within each of these stages are listed in Table 4.2 overleaf. There is overlap between the Crotty and

Sarantakos models and both models are utilised to guide the research design selection for this thesis. Kuhn (1970), as cited in Sarantakos (1998, p. 32) defines a paradigm as ‘a set of beliefs, values and techniques which are shared by members of a scientific community, and which acts as a guide or map’. Lincoln and Guba (1985, p. 15) consider sets of basic beliefs are ‘constituted into a *system of ideas*’ and define a paradigm as ‘a systematic set of beliefs, together with their accompanying methods’. There are however, differing views regarding the number of possible paradigms (Sarantakos 1998). Lincoln and Guba (2000) suggest four (positivism, post-positivism, critical theory and constructivism), Sarantakos (1998) suggests three (positivistic, interpretive and critical), whereas Lather (1992) suggests only two (positivist and post-positivist).

Table 4.2 - Options Within Crotty Stage1 and Sarantakos Stages 1 & 2 of Research Design.

First Two Elements of Research Process (Adapted from Crotty 1998, p.5)		
Epistemology		Theoretical Perspective
<ul style="list-style-type: none"> • Objectivism • Constructionism • Subjectivism 		<ul style="list-style-type: none"> • Positivism (and post-positivism) • Interpretivism <ul style="list-style-type: none"> ◦ Symbolic interactionism ◦ Phenomenology ◦ Hermeneutics • Critical inquiry • Feminism • Postmodernism • <i>Etc.</i>
<ul style="list-style-type: none"> • Positivism • Neopositivism • Methodological positivism • Logical positivism 	<ul style="list-style-type: none"> • Symbolic interactionism • Phenomenology • Ethnomethodology • Hermeneutics • Psychoanalysis • Ethnology • Ethnography • Sociolinguistics 	<ul style="list-style-type: none"> • Critical sociology • Conflict school of thought • Marxism • Feminism
Positivistic	Interpretive	Critical
First Element of Research Process Main Paradigms in Social Sciences (Adapted from Sarantakos 1998, p. 33)		

4.2.1 Selection of Research Design

Selection of epistemology and theoretical perspective (Crotty 1998) or paradigm (Sarantakos 1998) is a key issue as it governs the subsequent research process in regards to selection of methodology and method. This thesis involves examination of employees within charity organisations – a complex social situation in which people are interacting together on a regular basis. The thesis studies how the employees make sense of, and understand their ever-changing environment. Thus, based on the Sarantakos (1998) perspective, the paradigm utilised in this thesis is the ‘interpretive’ paradigm as interpretive theorists regard reality as created in the minds of people. In this thesis, this relates to the minds of the charity employees. Reality is ‘internally experienced, is socially constructed through interaction ... and is based on the definition people attach to it’ (Sarantakos 1998, p. 36). The actors assign ‘meaning systems to events’ and ‘subjective meanings, patterns and regularities of behaviour emerge as a result of social conventions, established through interaction’ (Sarantakos 1998, p. 37). Knowledge ‘is not derived through the senses only; understanding meanings and interpretations is more important’ (Sarantakos 1998, p. 38). This is thus an appropriate paradigm for this thesis that aims to analyse the meanings and interpretations employees have within charities.

Using the Crotty (1998) model involving determination of an epistemology and theoretical perspective, a constructionism epistemology and a interpretive theoretical perspective have been selected for this thesis. Constructionism contends that there is no objective truth waiting to be discovered, but that truth/meaning ‘comes into existence in and out of our engagement with the realities of our world’ (Crotty 1998, p. 8). Meaning is not discovered but constructed and ‘different people construct meaning in different ways, even in relation to the same phenomenon’ (Crotty 1998, p. 9). Crotty’s

‘interpretive theoretical perspective’ is similar to the ‘interpretive paradigm’ of Sarantakos. Similarly to the justification for utilising an interpretive paradigm, the justification for a constructionism epistemology and an interpretive theoretical perspective for this thesis are based on the aim of analysing the meanings and interpretations employees have within charities.

The next stage of the research design involves selection of methodology and method. This thesis involves examination of discourse within an organisation and how the employees of an organisation (a charity) see and interpret the world. Case study methodology (Creswell 2003) was utilised as the methodology for this thesis as it is a highly appropriate way to explore organisational discourse.

As indicated by Blaxter et al. (2003, p. 73) data from case studies is ‘drawn from people’s experience and practices and so are seen to be strong in reality’. Case study research is often used in ‘[o]rganizational and management studies’ (Yin 1994, p. 1) as it has the benefit of retaining ‘the holistic and meaningful characteristics of real-life events – such as ... organizational and managerial processes ...’ (p. 3) and thus contribute ‘uniquely to our knowledge of individual, organizational, social and political phenomena’ (p. 2) as they enable the study ‘complex social phenomena’ (p. 3). Similarly, case studies have the benefit of being able to ‘*[f]ocus on relationships and processes*’ and offer ‘the opportunity to explain *why* certain outcomes might happen ...’ (Denscombe 2003, p. 31). They ‘*deal with the subtleties and intricacies of complex social settings*’ (Denscombe 2003, p. 38) and occur in a natural setting, existing both before and after the research. Thus, case studies are extremely valuable and effective in enabling the identification of discourses circulating within organisations – which is the crux of this thesis.

The method stage then consisted of data collection via interviews and gathering of various artefacts, with data analysis via thematic analysis. Given the specific purpose of the thesis was to examine discourse transformation, the thematic analysis was structured around Foucault's (1991, pp. 55-56) framework for detecting changes in discursive formations. A summary of the research design utilised for this thesis is provided in Table 4.3 below and a detailed justification for use of case study methodology and thematic analysis is provided in the following sections.

Table 4.3 - Research Design Summary

Based on adapted models of Crotty (1998), Sarantakos (1998), Lincoln & Guba (1985).

Crotty (1998) model		Sarantakos (1998) model		Lincoln & Guba (1985) model
Epistemology	Constructionism	Interpretative	Paradigm	Naturalistic Inquiry
Theoretical Perspective	Interpretative			
Methodology			Case Study	
Methods			<u>Data collection</u> Interviews <u>Data analysis</u> Thematic analysis	
Crotty (1998) model & Sarantakos (1998) model				

4.3 Case Study Methodology

The research in this thesis involved examining discourse transformation. As will be justified in detail in the following pages, a case study methodology has been utilised in this thesis as it is regarded as the most appropriate way to gain in-depth data to analyse a discourse transformation.

4.3.1 Case Study Benefits

A case study can be defined as ‘a research strategy which focuses on understanding the dynamics present within single settings’ (Eisenhardt 1989, p. 534). McGivern (2003) emphasises the level of detail available via case studies by regarding a case study as a detailed and intensive in-depth analysis of a specific case whilst a more detailed definition is provided by Yin (1994, p. 13) who defines case studies as an empirical inquiry that ‘investigates a contemporary phenomena within its real life context, especially when boundaries between phenomenon and context are not clearly evident’ and in which multiple sources of evidence are used. Yin (1994) also states that a case study may analyse an individual role, small group, household, organisation, situation, event, community, nation, decision, process or incident.

Case study methodology provides tools ‘to study complex phenomena within their contexts’ (Baxter & Jack 2008, p. 544) and is regarded as ideal when a holistic and in-depth investigation is needed (Feagin *et al.* 1991) and can enable examination of complexity and context in a natural setting with a focus on relationships and processes (Denscombe 2003). In fact, as indicated by Aaker, Kumar, Day and Lawley (2005, p.

160), in certain circumstances ‘a case study may be the only way to understand a complex situation’.

Theory building involves induction, whereas theory testing involves deduction (Bryman 2004). As stated by Gummesson (2001, p. 35) in regards to case studies – ‘A case study could be primarily inductive where the case provides data for conceptualisation and theory generation, or primarily deductive where cases are used to confront existing theory with reality’. ‘*Inductive analysis* involves *discovering* the patterns, themes, and categories in data’ with findings emerging from the data via the researcher’s ‘interactions with the data’ (Patton 2002, p. 453). Inductive theory aims to bring ‘knowledge into view’ and is ‘generally descriptive, naming phenomena and positing relationships. It is frequently conducted in a naturalistic setting and considers *context* as a part of the phenomena’ (Morse & Field 1995, p. 8). The aim is to ‘identify patterns or commonalities by inference through the examination of specific instances or events. During analysis, the researcher moves from the specific instances or datum to more abstract generalisations extending from the synthesis of data, eventually resulting in the identification of concepts and theory development’ (Morse & Field 1995, p. 8). The research conducted in this thesis can thus be regarded as inductive research as it involves discovering themes and patterns.

Eisenhardt (1989, pp. 548-549) considers that the approach of theory developed from case study research ‘is particularly well-suited to new research areas or research areas for which existing theory seems inadequate’. Similarly, Gummesson (2007) suggests case studies are highly appropriate when knowledge in an area is either sparse or missing, and when complex phenomena are being studied. Likewise, case studies are regarded as appropriate to generate and build theory where new research is needed due to conflicting evidence, a knowledge void or incomplete knowledge (Dutton &

Dukerich 1991; Feather-Gannon *et al.* n.d.; Yin 1993). This is indeed the case with the field of research within this thesis.

4.3.2 Appropriateness for Research Objective

Case studies are commonly used in educational and organisational research. Yin (1994, p. 1) considers ‘case studies are the preferred strategy when “how” or “why” questions are being posed’. This is where a deep understanding is required, where the researcher does not have to control the behavioural events and the issue is contemporary. Likewise, Gummesson (2003, p. 488) suggests case study research ‘provides the researcher with an input of real world data from which concepts can be formed and propositions and theory can be tried ... The purpose of case study research is usually systemic and holistic, to give a full and rich account of a network of relationships between a host of events and factors’, thus case studies are ideal in examining ‘complexity and ambiguity’ (Gummesson 2001, p. 39).

An advantage of case studies is that they enable investigation of ‘a contemporary phenomenon within its real-life context’ (Yin 1992, p. 123) based on the experiences and practices of people and hence draw strongly from reality (Blaxter *et al.* 2003). Gummesson (2002, p. 585) is critical of many of the ways marketing theory is developed. He considers that ‘[g]eneration of marketing theory requires more of inductive and systematic case study research allowing us to confront the complexity, ambiguity and dynamism of the real world with more common sense and less ritual’. This is further support for the use of case studies in this thesis because it is appropriate to examine in detail real-life examples and gather specific and detailed data rather than conduct a higher-level ‘overview’ perspective of the issue in question in this thesis.

4.3.3 Value of Case Studies

Research via case studies is now often typically regarded as path-breaking and amongst ‘some of the most influential’ research (personal email communication, 27 September 2006, Professor Kathleen Eisenhardt). Similarly, acceptance of case studies ‘is pretty wide if the research questions, data, and interpretations are substantially strong’ (personal email communication, 8 September 2006, Professor Robert Stake) and case study research is ‘becoming more accepted but a lot of professors do not understand them’ (personal email communication, 8 September 2006, Professor Evert Gummesson).

Yin (1993; 1994) considers various quantitative approaches can lack rigor if not conducted properly but for case studies, lack of rigor can be addressed via use of well-developed case study protocol. As suggested by Westgren and Zering (1998), the burden on the researcher in case study research is to maintain rigor during the process of conducting the study.

Case study method is an established method within research pertaining to market orientation. Examples of prior research include - Grunert *et al.* (2005), Warnaby and Finney (2005), Yakimova and Beverland (2005), Beverland and Lockshin (2004a; 2004b), Brady (2004), Ottesen and Gronhaug (2002), Lewis, Pick and Vickerstaff (2001), O'Cass (2001) and Harris (1998).

4.3.4 Case Selection

A case is a specific, unique bounded system, and a case study is both a process of enquiry concerning a case as well as the product of that inquiry (Stake 2000). A

‘collective case study’ (Stake 1995, p. 4) approach was adopted in this thesis whereby a number of cases are examined to investigate a common phenomenon. Collective/multiple case studies are considered suitable when examining complex management processes and where little is known about the processes (Eisenhardt 1989; Strauss & Corbin 1998).

4.3.4.1 Unit of analysis

The unit of analysis is a key issue in case study research and is usually a ‘system of action rather than an individual or group of individuals’ (Sullivan Mort 2007). A case ‘connotes a spatially delimited phenomenon’ (Gerring 2007, p. 9) and research sites should be transparent in that they make the subject of inquiry readily visible (Eisenhardt 1989). Utilisation of a specific case enables ‘an empirically grounded class of constraints on the form and evaluation of possible stories within the institution’ (Linde 2003, p. 532). Bryman (2004, p. 51) refers to ‘exemplifying’ cases, in which the cases are selected ‘because they will provide a suitable context for certain research questions to be answered’. For this research, a research site was defined as a single not-for-profit charity organisation that provides assistance for health related and social issues. A ‘case’ included employees, either paid or volunteer within the specific organisation.

4.3.4.2 Number of cases

There are no specific guidelines regarding how many cases need to be conducted in case study research, however ‘[m]ultiple cases ... have the advantage of allowing the researcher to triangulate data from multiple sources, thus allowing results to be

generalised beyond a single case' (Aaker *et al.* 2005, p. 161). Issues that also need to be considered include time and resources, particularly with post-graduate research (Sullivan Mort 2007). Richer theory can be developed from multiple case studies relative to a single case (Eisenhardt 1989) and use of secondary data and multiple interviews in each case to develop deep insights provides a greater basis for transferability to other contexts (Eisenhardt 1991) whereby 'theory building from multiple cases typically yields more robust, generalisable, and testable theory than single-case research' (Eisenhardt & Graebner 2007, p. 27). Along with dependability and confirmability, transferability is a key quality indicator in qualitative research (Lincoln & Guba 1985) adding further justification for use of multiple rather than single case studies. A contrary view to Eisenhardt is offered by Dyer & Wilkins (1991) who consider multiple cases only offer surface-level data relative to a single case study. Similarly, Gummesson (2007) considers 'the more cases you have, the shallower each case will be within given resources' whilst Dyer and Wilkins (1991) suggest that a single case can often generate appropriate data.

As indicated in Section 4.3.3 above, case study method is an established method within research pertaining to market orientation. During the review of literature involving use of case studies by researchers to examine market orientation, the number of cases examined by these various researchers ranged from one to eight cases, with an average of three cases per study.

Whilst acknowledging the differing views regarding the advantages and disadvantages of one case versus multiple cases, based on consideration of these views it was decided that three case studies were appropriate. This had the opportunity to offer a level of generalisability not possible with a single case. Indeed, resultant data gathered from the three cases was consistent (or explainable) hence the research ultimately

utilised three cases, with more cases deemed not required. In keeping with Sullivan Mort (2007), the number of cases, plus the number of interviews conducted was regarded as appropriate for a PhD thesis.

4.3.4.3 Case selection

A criteria-based selection process (LeCompte & Preissle 1993) was utilised to select the cases, bearing in mind that various practical issues can influence research design, including access, constraints of time and geographical logistics (Dawson 2003; Phillips & Hardy 2002). The criteria utilised were - not-for-profit charities, operating in the 'health advice and assistance' sector, geographically based in South Eastern Australia in close proximity to Wollongong, and having experienced an attempt to introduce a market orientation. The level of success in introducing a market orientation was not a consideration and indeed was not known at time of case selection. The focus on a single 'industry' also reduced the likelihood of external influence (Chandy & Tellis 1998; McDonald 2007). Case selection was conducted purposefully 'to suit the purposes of the research problem' (Aaker *et al.* 2005, p. 161). Using the criteria-based selection process, three specific cases were selected. Due to confidentiality issues, the case organisations will be referred to by pseudonyms. Namely - Arana, Bukari and Camira.

4.3.4.4 Number of interviews

Following-on from the issues mentioned above regarding the number of cases, similarly, no specific rules exist for the appropriate number of interviews/respondents within one case. A 'guideline should be to get as many relevant perspectives on the

phenomenon being investigated as possible' (Aaker *et al.* 2005, p. 161). This also has resource and timing implications that may perhaps be a limiting factor. For the three cases studies, a cross-section of employees were interviewed.

Within each case organisation, selection of potential respondents for interview are possible via two types of sampling – 'purposive' where all the respondents are known, or 'theoretical' where only a couple of initial respondents are known. Noble (2005) suggests 'purposive' sampling is recommended when a well developed theory exists, whereas 'theoretical' is recommended when the theory is not clear, or the aim is to build theory progressively. In this research, within each case, theoretical sampling of interviewees was considered relevant as the initial theory was not clear and subsequent theory was built and refined progressively. This also increased the likelihood that theoretically relevant results would be obtained (Glaser & Strauss 1967; Yin 1984). In the course of various interviews, it was found that some respondents suggested other appropriate stakeholders for interview. As indicated by Eisenhardt (1989, p. 539), 'the goal of theoretical sampling is to choose cases which are likely to replicate or extend the emergent theory'.

The number of interviewees within each of the three organisations varied due to organisational size and structure. Theoretical sampling typically stops when 'theoretical saturation' occurs; namely, no new or relevant data appear to be emerging. Thus, interviews of relevant employees and other stakeholders continued until 'saturation' occurred with the issue of number of interviews ultimately determined by 'having a sufficient number of arguments of sufficient quality and sufficient data for those arguments to be well grounded' (Wood & Kroger 2000, p. 81). It should be noted that all interviews were voluntary. Whilst potential respondents were given an information sheet in advance regarding the broad nature of the research, it is possible that views of

employees who may have chosen not to be interviewed may have differed from the views of employees who agreed to be interviewed, thus potentially all views of all employees may not have been captured.

4.4. Data Collection and Analysis Method

4.4.1 Overview

Selection of appropriate methods of data selection, collection and analysis depend on the object of research (Fairclough 2005). Case study methodology typically relies ‘mainly on interviews and observation of real settings for getting empirical material’ (Alvesson & Deetz 2000, p. 192) and interviews enable the subjects to offer their perceptions in their own words, without imposed pre-defined terms (Tregear 2003). Interviews were thus selected as the appropriate data collection method.

Semi-structured in-depth interviews involving open-ended questions were utilised providing an appropriate level of freedom to obtain rich, detailed data within the general research area. The interviews provide the opportunity to obtain data from specific individuals without potential influence by other respondents (Aaker *et al.* 2005). The interviews aimed to explore the ‘lived experience’ (Covaleski *et al.* 1998) of those being interviewed. This enabled gathering of data from respondents regarding the ‘everyday actions and events as they pertained to the exercise of the control and social processes that enabled them to understand and survive in their work environment’ (Covaleski *et al.* 1998, p. 306). Whilst conducting the interviews, a key to successful data collection involves asking respondents follow-up questions to enable the interviewer to answer issues such as “‘What am I learning?’” and “‘How does this case

differ from the last?” ...’ (Eisenhardt 1989, p. 539). ‘Theory-building researchers typically combine multiple data collection methods’ (Eisenhardt 1989, p. 537) and generally use ‘multiple sources of evidence’ (Yin 1993, p. 3). The ‘triangulation made possible by multiple data collection methods provides substantiation of constructs and hypotheses’ (Eisenhardt 1989, p. 538) and use of multiple sources increases the validity of the research (Haigh n.d.; Parkhe 1993).

An interview protocol was utilised to ensure consistency. The ‘heart’ (Yin 1994, p. 69) of the protocol are the interview questions, a copy of which is contained in Appendix 4. This “‘bureaucratisation of fieldwork’” (Miles 1979, p. 594) assists the analysis process and replication (Sinkovics *et al.* 2005). Case studies offer the opportunity to use existing frameworks as a base (Eisenhardt 1989) and, where possible, this was done in the proposed research with existing for-profit market orientation frameworks utilised as a guide to develop some of the interview questions. Topics for discussion were particularly informed by Lafferty and Hult’s (2001) four fundamental principles of market orientation - namely customer needs, service delivery, information generation and inter-functional issues.

As indicated by Hughes (2002), interviews have numerous strengths; namely, face-to face, generation of large amounts of expansive and contextual data; immediate clarification and follow-up of omissions; and data collection in a natural setting with non-verbal behaviour and communication able to be observed. However, in ‘a qualitative interviewing process the interviewer acts as the instrument and so care must be taken in both planning and management of the interviews’ (Rao & Perry 2003, p. 242), hence, the need for development of, and strict adherence to protocols.

4.4.2 Interview Protocol

Guidelines suggested by Eisenhardt (1989) to build theories using case study research were used. In fact, Eisenhardt tends to draw upon the seminal works of Glaser and Strauss (1967), Miles and Huberman (1984) and Yin (1984). A summary of Eisenhardt's guidelines for case study research, including data collection and analysis are provided in Table 4.4 overleaf.

The protocol suggested by Yin (1994, p. 64) involves overview of the case study project (objectives, issues, topics being investigated), field procedures (access to sites, sources of information), case study questions (specific questions that the investigator must keep in mind) and a guide for the case study report. In the development of an interview protocol, prior theory can be utilised to guide direction of the planned interviews (Perry 1998). Tellis (1997) considers that pilot projects are useful in determining final protocol. Thus, the interview protocol was piloted with three Arana employees prior to refinement and subsequent use with all three case organisations. In-depth interview schedule guidelines developed by Noble (2005) and listed in Table 4.5 overleaf were utilised for the research, as were guidelines from Creswell (1998). Interview questions specifically included the seeking of workplace anecdotes as these 'contribute to the construction of complex personal, professional and social identities for workplace participants, allowing them to emphasize particular facets of their social identities and different dimensions of social meaning' (Holmes 2006, p. 186).

Table 4.4 - Guidelines For Theory Building Via Case Study Research (Eisenhardt 1989, p. 533).

Process of Building Theory from Case Study Research		
Step	Activity	Reason
Getting Started	<ul style="list-style-type: none"> • Definition of research question • Possibly a priori constructs • Neither theory nor hypotheses 	<ul style="list-style-type: none"> • Focuses efforts • Provides better grounding of construct measures • Retains theoretical flexibility
Selecting Cases	<ul style="list-style-type: none"> • Specified population • Theoretical, not random sampling 	<ul style="list-style-type: none"> • Constrains extraneous variation and sharpens external validity • Focuses efforts on theoretically useful cases- i.e. those that replicate or extend theory by filling conceptual categories
Crafting Instruments and Protocols	<ul style="list-style-type: none"> • Multiple data collection methods • Qualitative and quantitative data combined • Multiple investigators 	<ul style="list-style-type: none"> • Strengthens grounding of theory by triangulation of evidence • Synergistic view of evidence • Fosters divergent perspectives and strengthens grounding
Entering the Field	<ul style="list-style-type: none"> • Overlap data collection and analysis, including field notes • Flexible and opportunistic data collection methods 	<ul style="list-style-type: none"> • Speeds analyses and reveals helpful adjustments to data collection • Allows investigators to take advantage of emergent themes and unique case features
Analyzing Data	<ul style="list-style-type: none"> • Within-case analysis • Cross-case pattern search using divergent techniques 	<ul style="list-style-type: none"> • Gains familiarity with data and preliminary theory generation • Forces investigators to look beyond initial impressions and see evidence thru multiple lenses
Shaping Hypotheses	<ul style="list-style-type: none"> • Iterative tabulation of evidence for each construct • Replication, not sampling logic across cases • Search evidence for "why" behind relationships 	<ul style="list-style-type: none"> • Sharpens construct definition, validity, and measurability • Confirms, extends and sharpens theory • Builds internal validity
Enfolding Literature	<ul style="list-style-type: none"> • Comparison with conflicting literature • Comparison with similar literature 	<ul style="list-style-type: none"> • Builds internal validity, raises theoretical level and sharpens construct definitions • Sharpens generalisability, improves construct definition and raises theoretical level
Reaching Closure	<ul style="list-style-type: none"> • Theoretical saturation when possible 	<ul style="list-style-type: none"> • Ends process when marginal improvement becomes small

Table 4.5 - *Schedule For Development Of In-depth Interviews* (adapted from Noble 2005).

Stage	Action
1	general research area
2	specific research questions
3	interview topics
4	formulate interview questions
5	review/revise interview questions
6	pilot schedule
7	identify any novel issues
8	revise schedule
9	finalise guide

4.4.3 Data Collection and Analysis – The Three Case Studies

4.4.3.1 Data Collection

The three charities analysed in this thesis are referred to as Arana, Bukari and Camira. Data collection was initially collected from Arana, then Bukari, then Camira. As indicated above, semi-structured, face-to-face interviews containing open-ended questions were utilised to collect data. Guidelines for conducting interviews suggested by Patton (2002) were followed. The in-depth interviews were augmented with direct observation and archival material and other artefacts deemed relevant (Gillham 2000). These included annual reports, organisational induction manuals, strategic plans, organisation brochures, newsletters, examples of client surveys and organisational internet sites to not only provide additional data but also to assist with triangulation.

Research objectives ‘must drive the sampling approach and representativeness is the key criterion’ (Elliott 1996, p. 66), thus, the in-depth interviews were initially conducted with the Chief Executive Officer (or equivalent) followed by a theoretical

sampling basis. Employees interviewed were from all levels of management (vertical) and across all functional areas (horizontal) to gain a complete 360 degree perspective (Steinman *et al.* 2000; Webb *et al.* 2000). This approach was utilised as organisations consist of subgroups, referred to as ‘thought worlds’ by Douglas (1986) and ‘no single story every reveals the truth about organizations’ (Fiol 1995, p. 71), hence a need to interview a range of employees across all functional areas. Interviews were conducted one-on-one and utilised a phenomenological focus based on perspectives of the participants and their ‘lived’ meanings (Thompson *et al.* 1989) with the aim of such interviewing ‘to understand experience as closely as possible as its participants feel or perceive it’ (Haytko 2004, p. 314). The staff possessed a range of backgrounds, experience and training – including long-term not-for-profit organisational employees, to newer employees from more commercial backgrounds. Interviews were conducted either in the office of each participant, or in a meeting room on the premises of the charity. Staff interviewed were based at either the Head Office of each charity, or at regional offices and service centres. Interviewing stopped after saturation was considered to have been achieved, with little extra relevant new data being obtained. Fifteen participants were interviewed at Arana, ten at Bukari and fifteen at Camira (see Table 4.6 below).

Table 4.6 – Summary of Interview Details.

Charity	Arana	Bukari	Camira	Total
Number of Participants	15	10	15	40
Maximum interview length	58 mins	74 mins	56 mins	74 mins
Average interview length	37 mins	39 mins	34 mins	36 mins
Minimum interview length	27 mins	28 mins	17 mins	17 mins

N.B. Interview length includes follow-up interview if relevant.

The questionnaire was revised after the initial three interviews at the first case (Arana) to include key questions that had not been considered prior to commencement of the interview schedule. As indicated in Table 4.6, interviews ranged in length from 17 to 74 minutes with an average of 36 minutes. In some instances, short follow-up interviews were conducted to clarify some issues and gain elaboration. The longest interviews were typically with the CEO's and senior management within each charity.

Whilst notes were taken during the interviews, each interview was also digitally recorded (based upon permission from the interviewee). Recordings were subsequently transcribed by an independent professional transcriber and provided electronically to the researcher as Microsoft Word files. The researcher 'is actively involved in the data generation [thus] the questions used in the interview become part of the text as they set some of the functional context for the answers' (Elliott 1996, p. 66). Therefore, the entire interviews were transcribed, not just respondents' answers to the questions. The resultant Microsoft Word files were then checked for accuracy by the researcher against the original recordings using 'Express Scribe' software. Copies of interview transcripts were subsequently provided to respondents to verify accuracy and where appropriate, follow-up interviews were used to clarify and elaborate on issues identified during the initial interviews.

4.4.3.2 Data Analysis

This thesis involved examination of the introduction of marketing discourse into charity organisations and thus required detection of a possible discourse transformation. Therefore, the detailed thematic analysis of the transcripts was conducted within Foucault's (1991, pp. 56-57) framework which provides guidelines 'for detecting the

changes which affect discursive formations’ (p. 56). This framework suggests four criteria for identifying a discourse transformation, namely, ‘the displacement of boundaries’ (p. 56), ‘the new position and role occupied by the speaking subject’ (p. 56), ‘a new mode of functioning of language’ (p. 57) and ‘circulation of discourse’ (p. 57).

In regards to ‘displacement of boundaries’, analysis involved seeking evidence or otherwise of movement in the boundaries of the existing charity discourse to a new discourse. Assessment of ‘the new position and role occupied by the speaking subject’ involved seeking evidence or otherwise that employees within the charities considered their subject position and roles had changed. Likewise, evidence or otherwise of changes in language - ‘a new mode of functioning of language’ was sought from analysis of the transcripts. If new language is utilised within an organisation, this can be evidence of introduction of a new discourse. The manner in which management introduced ‘circulation of discourse’ in relation to the new market oriented discourse was the fourth aspect of detecting discursive formations that guided the thematic analysis. These four criteria thus provided a broad framework around which the thematic analysis was conducted.

In relation to the actual thematic analysis of data, whilst various proprietary software including NVivo and Leximancer computer programs exist to assist with qualitative analysis and were considered for data analysis, transcriptions were ultimately analysed manually as it was determined that manual analysis of the data offered greater ‘immersion’ of the researcher in the data. This is in keeping with the recommendations of Wood and Kroger (2000).

Miles and Huberman (1994) consider that there are five main stages to qualitative analysis (see Figure 4.3 below) with Gummesson (2007) indicating that the key to qualitative research is comparison.

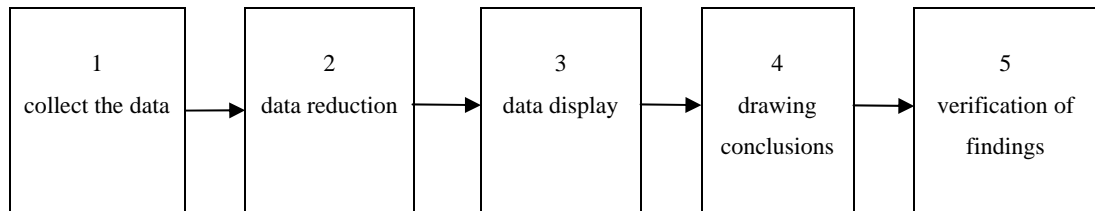


Figure 4.3 - *The Five Main Stages of Qualitative Analysis* (Miles & Huberman 1994).

Analysis of the data collected from the three case studies was conducted within-cases prior to cross-case analysis as recommended by Miles and Huberman (1994). Whilst data analysis procedures recommended by Miles and Huberman (1994) were utilised as a general guide, the actual thematic analysis was specifically informed by guidelines developed by Patton (2002, particularly pp. 452-471), Cresswell (2003, particularly pp. 190-195) and Tesch (1990, particularly pp. 142-145) to identify emergent themes and, in accordance with Ellis (2008, p. 35), ‘coding of transcribed material involved a thematic approach embracing both manifest and latent interpretation’. When conducting interviews, there is a need to focus not just on what is being said by respondents, but also potentially on what was not said. Hand-written notes taken during the interviews can note these issues and thus need to be taken into account during data analysis of the interview transcripts.

Once various themes were identified in transcripts of individual interviews within a case organisation, these were aggregated into one composite document for the organisation, with fine-tuning of theme names occurring as an ongoing iterative process where appropriate. Themes were then organised and listed under the broad framework of Foucault’s (1991, pp. 56-57) four criteria of discursive formations, namely

‘displacement of boundaries which define the field of possible objects’ (p. 56), the ‘new position and role occupied by the speaking subject in discourse’ (p. 56), ‘a new mode of functioning of language with respect to objects’ (p. 57) and ‘circulation of the [new] discourse’ (p. 57).

4.4.3.3 Transcription Convention

Throughout this thesis, quotes from respondents are identified using three fields as follows –

Field 1: Case A, B or C, corresponding to Arana, Bukari and Camira respectively.

Field 2: Respondent A, B, C etc.

Field 3: Commencement line number from original Microsoft Word transcript of each interview.

For example -

(AE36) – refers to case ‘A’ - Arana, respondent ‘E’, and a quote commencing on line 36 of the interview transcript.

All respondents’ direct quotes obtained during the interviews are reported in this thesis in italic font, whereas, any quotes from printed material is reported in non-italic font.

4.5 Research Quality

Potential quality issues can occur in any research. In this thesis, appropriate research practices have been utilised to minimize the possible occurrence of problems. Research quality can be assessed based upon four criteria – construct validity, internal validity, external validity and reliability. These quality issues can be addressed in multiple-case studies by adoption of the ‘tactics’ developed by Yin (1994) and Parkhe (1993) as indicated in Table 4.7 below. Whilst Yin (1984) considers the traditional measures of quality are relevant to case studies and offers suggested guidelines for case studies, Stake (1995) puts less emphasis on case study quality issues.

Table 4.7 - Case Study Tactics To Address Research Quality Criteria

Adapted from Yin (1994, p. 33) and Parkhe (1993, p. 261).

Quality Tests	Quality test definition	Case study tactic	Phase of research in which tactic occurs
Construct validity	Correct measures for the concepts being examined.	<ul style="list-style-type: none"> • Use multiple evidence sources • Establish chain of evidence • Have key informants review draft report 	<ul style="list-style-type: none"> • Data collection • Data collection • Composition
Internal validity (explanatory or causal studies only, not for descriptive or exploratory studies)	Establishment of a causal relationship where specific conditions lead to other conditions (compared with spurious relationships).	<ul style="list-style-type: none"> • Do pattern-matching • Do explanation-building • Do time-series analysis 	<ul style="list-style-type: none"> • Data analysis • Data analysis • Data analysis
External validity	The domain within which the findings of the study findings can be generalised.	<ul style="list-style-type: none"> • Use replication logic in multiple case studies 	<ul style="list-style-type: none"> • Research design
Reliability	Aspects of a study (e.g. data collection procedures) can be repeated and the same results obtained.	<ul style="list-style-type: none"> • Use case study protocol • Develop case study data base 	<ul style="list-style-type: none"> • Data collection • Data collection

Lincoln & Guba (1985) do not refer to ‘quality’ but to ‘trustworthiness’ and consider four questions need to be considered as listed in Table 4.8 overleaf.

Table 4.8 – Questions to Determine ‘Trustworthiness’ of Qualitative Research

(adapted from Lincoln & Guba 1985, p. 290).

Criteria	Issue
Credibility (Truth value)	How can we ‘establish confidence in the “truth” of the findings?’
Transferability (Applicability)	How can we ‘determine the extent to which the findings ... have applicability in other contexts or with other subjects (respondents)?’
Dependability (Consistency)	How can we determine whether the findings ‘would be repeated if the inquiry were replicated with the same ... subjects ... in the same ... context?’
Confirmability (Neutrality)	How can we determine ‘the degree to which the findings ... are determined by the subjects ... and conditions of inquiry and not by the biases, motivations, interests, or perspectives of the inquirer?’

In the naturalistic paradigm, to determine trustworthiness of the research, Lincoln & Guba (1985) suggest four criteria – credibility (to address truth value), transferability (to address applicability), dependability (to address consistency) and confirmability (to address neutrality). Credibility can be addressed via ‘prolonged engagement’ and triangulation (Lincoln & Guba 1985). Rather than a researcher having to prove that transferability of the research findings can be done, Lincoln & Guba (1985, p. 316) contend that it is the responsibility of the researcher ‘to provide the *data base* that makes transferability judgments possible on the part of potential appliers’. Dependability can be obtained via triangulation and an audit to show the research has been conducted appropriately, whilst confirmability can also include an audit and triangulation (Lincoln & Guba 1985). A summary of the techniques for establishing trustworthiness developed by Lincoln & Guba (1985) is listed in Table 4.9 overleaf.

Table 4.9 – *Summary of Techniques for Establishing Trustworthiness in Naturalistic Inquiries*

(adapted from Lincoln & Guba 1985, p. 328).

Criterion Area	Technique
Credibility	Field activities that increase the probability of high credibility – <ul style="list-style-type: none">• prolonged engagement• persistent observation• triangulation (sources and methods)
Transferability	Thick description
Dependability	Dependability audit
Confirmability	Confirmability audit
All of the above	Reflexive journal

Thus, to ensure research quality, the research design and subsequent collection and analysis of data in this thesis was based upon utilisation of seminal and internationally recognised quality practices for case study (e.g. Eisenhardt 1989; Gummesson 2007; Stake 1995; Yin 1993, 1994) and qualitative research (e.g. Creswell 2003; Lincoln & Guba 1985; Miles & Huberman 1994; Patton 2002). Appendix 5 contains two additional Tables regarding quality developed by Gummesson (2007) and Cresswell (2003) respectively that have also informed this research.

4.6 Ethical Considerations

The research proposal was submitted to the University of Wollongong ethics committee for approval in early June 2008 with approval subsequently gained on 30 June 2008. The Chief Executive Officer (or equivalent) of potential ‘case’ organisations was then initially contacted in person with follow-up letters providing details of the

planned research (including purpose, method and requirements of participants). Face-to-face meetings were subsequently arranged to formalise participation in the research.

On behalf of the researcher, the Chief Executive Officer (or equivalent) then gave a 'Participant Information Sheet' to potential participants containing details of the research including contact details of the researcher. Interested potential participants then contacted the researcher to arrange interview times.

Research activities involving participants (i.e. interviews) were conducted on the premises of the selected charities. Only the researcher retained a list of participants. This ensured confidentiality and prevented potential discrimination of employees who did or didn't participate in the research.

Prior to commencement of all interviews, participants were given a 'Consent Form' to complete and sign that confirmed their agreement to participate in the research and their understanding of the research and its procedures (including digital audio recording of the interview). The consent form also indicated the participant's involvement in the research, that participation was voluntary, that the participant was free to withdraw from the research at any time, that the interview discussion would be recorded on a digital voice recorder, that data collected from the interview would be used primarily for a doctoral thesis and that the participants had been given the opportunity to ask the researcher questions about the research.

The digital recordings of interviews were not copied. Following transcription of interviews, the memory stick containing the digital recordings and any notes taken during the interviews were stored under lock and key within the premises of the University of Wollongong. The digital recording and subsequent transcriptions referred to participants by a code and thus prevent identification of individuals. The researcher is

the only person who has a list identifying names to codes. This list is stored under lock and key within the premises of the University of Wollongong.

4.7 Research Rationale and Framework

As previously indicated, the aims of this research are to aims of this research are to ‘*examine the process of introducing and legitimising a marketing discourse into charity organisations*’ and subsequently ‘*develop a conceptual best practice framework to guide charities*’. These aims are based upon the review of market orientation literature and identification of the gaps as noted in Chapter 2. The aim will be achieved utilising the rationale and framework contained in Figure 4.4 overleaf.

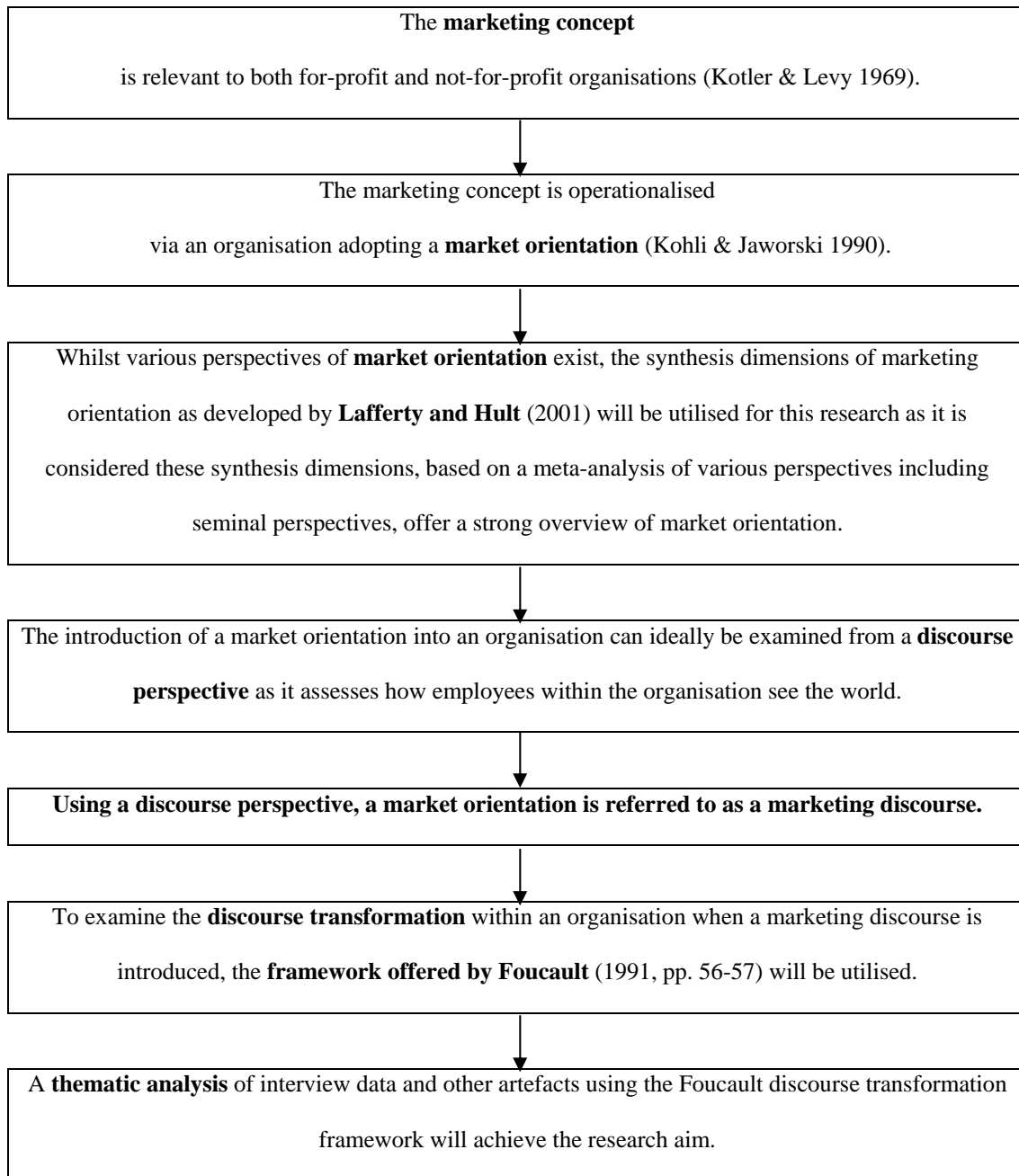


Figure 4.4 – *Research Rationale and Framework*

4.8 Chapter Summary

This chapter provided a detailed development of the research design. Following an initial generic discussion of the design process and options, details were presented of the selected design. The chosen research design incorporated a constructionism epistemology and interpretive theoretical perspective (i.e. interpretive paradigm) with a case study methodology and subsequent data collection and analysis methods utilising in-depth interviews and thematic analysis respectively. This design was considered highly appropriate to address the research aims. Potential quality limitations of the research were acknowledged and appropriate tactics and guidelines identified for utilization in the research to minimise any quality issues. The chapter concluded with details of the ethical considerations implemented for the research.

The following three chapters thus discuss the results of the data collected via the research design process described in Chapter Four.

CHAPTER FIVE : CASE STUDY ONE – Arana

Underpinned by Social Entrepreneurialism

5.1 Chapter Outline

The discourse transformation in Arana, the first case study organisation, is discussed and analysed. The chapter focuses on the shift from a traditional charity discourse to a hybrid discourse of new managerialism and marketing underpinned by social entrepreneurialism.

An overview of the case organisation is offered, followed by assessment of the discourse transformation based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations which are – firstly, displacement of discourse boundaries; secondly, the new position and role of the speaking subject; thirdly, the new mode of functioning of language; and lastly, circulation of the discourse. Displacement of boundaries involved analysing the extent of the current discourse and subsequently the changes and movement in discourse boundaries as new concepts and ideas were introduced into and altered the previous discourse. The new position and role of the speaking subject involved assessing any changes in subject positions for employees as a result of introduction of new discourse elements. Some employees also gained new roles that resulted in required new behaviour from the employees. New mode of functioning of language involved examining any changes in the type of language utilised within the organisation, whilst circulation of discourse involved examining the manner in which the new discourse was initially introduced into, and subsequently

rolled-out throughout the organisation. The chapter finishes with a summary of the case findings.

An outline of the chapter is contained in Figure 5.1 below.

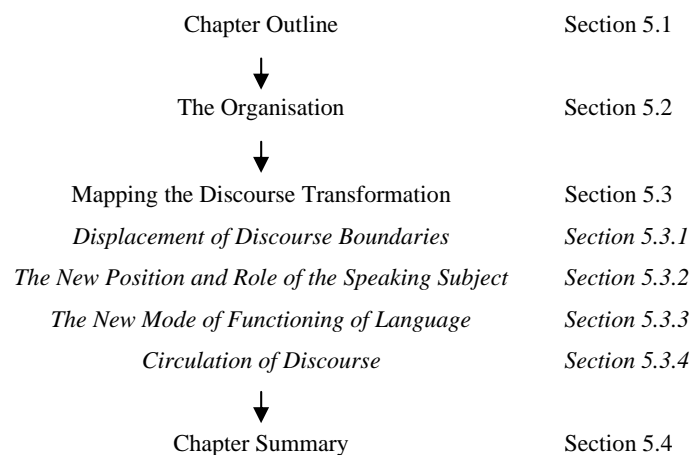


Figure 5.1 - Outline of Chapter 5.

5.2 The Organisation : Arana

Based on the south-east coast of New South Wales, Australia, Arana was established in 1974 and is a not-for-profit community based organisation that raises funds for ‘ongoing charitable purposes’ (Arana n.d., p. 5). Operating only within the local region, Arana provides ‘a range of services and supports for people with [a specific medical condition] and their families’ (Arana n.d., p. 5). To maintain anonymity, the specific medical condition has not been mentioned. Arana is predominately funded by both State and Federal Government but also raises some funds via fund-raising activities within the community. The service aspect of Arana’s

operation is emphasised in their vision statement – ‘create services’ and in the mission statement – ‘efficient and effective services’.

Guided by a somewhat visionary long-term CEO, Arana has progressively introduced a discourse change in a relatively low-key manner since the early to mid 2000’s. Arana has since grown markedly, with 2007/08 regarded by the Chairperson as ‘a period of significant growth, bedding down new structures and coming to terms with life as a much more complex organisation and at the same time dealing with significant staffing issues’ (Arana 2008, p. 4). Arana currently has approximately 1,700 service recipient clients, 160 permanent staff and 200 casual staff and is divided into a range of divisions providing various services to the target client base. A newly formed for-profit division not only provides employment for service recipient clients with the specific medical condition, but also competes in the open market to provide various services such as lawn mowing and property maintenance for external, paying clients. Revenue from this fee-for-service division provides additional funds for use within the organisation.

As can be seen in Table 5.1 below, Arana’s revenue has increased significantly in the past three years via both the fee-for-service division as well as via government grants.

Table 5.1 – *Arana Revenue for Most Recent 3 Years* (Arana 2007, 2008)

REVENUE	2005/06	2006/07	2007/08
Fee-for Service	\$2.9 million	\$3.5 million	\$5.2 million
Government Grants	\$5.6 million	\$6.6 million	\$10.2 million
Total Income	\$8.5 million	\$10.1 million	\$15.4 million

The increased revenue has coincided with significant changes towards a more professional and businesslike perspective involving numerous aspects of a market-

oriented discourse being introduced within the organisation. These changes have included a strong social entrepreneurialism focus (including the creation of the for-profit division) as well as increased use of key performance indicators, reporting processes and recognition of the need to develop relationship marketing activities with key government fund providers to cement funding sources for the future.

Within the grounds of research confidentiality, a profile of the employees interviewed for this research is contained in Table 5.2 below.

Table 5.2 – Profile of Arana Respondents

Respondent Code	Function	Gender	Age	Years with Arana
AA	Senior Manager - Admin	M	30-40	>10
AB	CEO	F	>40	>10
AC	Senior Manager - Admin	F	>40	>10
AD	Service delivery - Manager	F	>40	<5
AE	Service delivery – Operations Manager	M	>40	5-10
AF	Admin – service provider	F	>40	<5
AG	Service provider	F	<30	<5
AH	Admin – Manager	F	>40	5-10
AI	Service provider	F	<30	<5
AJ	Service delivery - Manager	M	>40	<5
AK	Service delivery - Project Officer	F	>40	5-10
AL	Chairperson	M	>40	>10
AM	Business Development Manager	M	>40	<5
AN	Service delivery - Manager	M	<30	<5
AO	Service delivery - Manager	M	30-40	<5
		Count Male = 7 = 47% Female = 8 = 53%	Count <30=3=20% 30-40=2=13% >40=15=67%	Count <5=8=53% 5-10=3=20% >10=4=27%

It should be noted that only current employees were interviewed. Former employees were not interviewed within this research. All interviews were voluntary.

Whilst it is not known if any employees invited to be interviewed chose not to be interviewed, it is possible that the views of any such employees may have differed from the views of those interviewed and may thus not have been captured in this research.

As detailed in Section 4.3.4.4 above, theoretical sampling was utilised. As noted from Table 5.2, there was a relatively equal mix of genders, a dominance of respondents over the age of 40, with 53% of respondents having less than 5 years of service. Thus, these newer employees have joined Arana during the discourse change process.

5.3 Mapping The Discourse Transformation

5.3.1 Displacement of Discourse Boundaries

This section commences with examination of what respondents regarded as a traditional charity discourse then examines perceived differences between traditional charities and for-profit organisations. These two sections provide a base to then analyse the changes that have occurred. The shifting boundaries of the discourse to develop a new competitive strategy are identified, indicating a discourse transformation based upon market orientation via a social entrepreneurship model. Specific aspects of the new discourse are then discussed, namely the economic model for revenue raising, identification of the existence of the four key dimensions of market orientation, relationship marketing, interdiscursive tension as well as the finding that respondents perceive marketing as communicative.

5.3.1.1 Traditional charity discourse

Prior to discussing the current discourse operating within Arana, respondents' views regarding a traditional charity discourse were obtained. The traditional charity discourse is underpinned by the fund-raising model and was perceived by respondents to be characterised by a struggle for funds, the portrayal of service recipient clients as victims, a narrow focus, lack of innovation, reliance on volunteer workers and a church-based ethos. Raising funds from the private sector (compared with government grants) was regarded as a distinct characteristic of the traditional charity. Whilst most charities were perceived as being small-scale and living from one small fund raising event to the next, there was recognition that, a few, larger charities did exist and tended to be more successful. A typical comment from a senior manager at Arana that explained how traditional charities were perceived is '*...what comes to mind is more of a small, grass roots type community based charity that is struggling to survive, and pretty much runs a few fetes and cake stalls and that sort of thing to just get by*' (AA61).

The traditional charity was regarded as portraying service recipient clients as victims. The Arana CEO commented that the practice has '*created some very negative stereotypes around helplessness and the whole de-valued status of ...[service recipient clients]*' (AB29). Likewise, a service provider commented that '*... ads on TV with people with a disability, that pulls on a few heart strings, they get some money ... but it's been at the cost of the person's disability*' (AC64). This positioning of service recipient clients' identity was perceived as designed to elicit pity and play on the sympathy of donor clients in an attempt to attract donations. Whilst potentially successful in generating donations, this tactic was not regarded positively by either

senior management or service providers within Arana. It was perceived as exploitative and a negative use of marketing.

Another characteristic of traditional charities was a perceived narrow focus and lack of innovation - '*... they were there to do a job, and they had a very narrow focus on what that job was, what their role was*' (AJ43). Although this narrow focus was not necessarily regarded as a negative, it did potentially prevent charities from seeing other avenues of operation that may enable the charity to offer more services to benefit service recipient clients. This was regarded as a lack of imagination and foresight by managers of traditional charities, with a typical comment by an Arana middle manager - '*The old school? Very slow to innovate, very keen to do what has been done before, if it's been done last year, we can do it this year again. So almost stagnation ... being resistant to change, they are happy to do it the way it's always been done*' (AO34).

A reliance on volunteer workers has traditionally characterised charity discourse practices, '*with a few full time workers ... working with a lot of volunteers on a shoe string budget*' (AM88). Charities were seen '*to rely on handouts and charity and volunteers to help them*' (AA265). Whilst efforts of volunteers were recognised as positive in some areas, it was not an optimal subject position because the skills and the image of volunteers was less than that of professionals and not what a more market-oriented charity would prefer. A final characteristic identified by Arana employees of traditional charities was the typical church-based ethos. '*Having worked for a charity ... generally their religious ethos is paramount*' (AD50). It was also considered that this ethos tended to be the over-riding influence on the operations of the charity and was not necessarily in the best interest of service recipient clients and the charity '*generally holds that ethos above what's maybe beneficial to the [service recipient] client, the [service recipient] client doesn't always come first*' (AD48).

The employees of Arana tended to suggest that although aspects of the traditional charity discourse were well meaning, there were aspects that were out of place in a market-oriented perspective, specifically the notion that volunteers provided less professional service delivery than formal, trained providers. Thus respondents considered there was tension between professionalism in market-oriented discourse and the philanthropic perspective of volunteers who were perceived as providing a less than optimum service to service recipient clients.

5.3.1.2 Differences between traditional charities and for-profit organisations

The more market-oriented and professional charities are often regarded as closer to for-profit organisations than to traditional charities so it is interesting to assess the views of Arana employees regarding the differences between traditional charities and for-profit organisations. Arana employees considered there were two key differences between a traditional charity discourse and a typical for-profit discourse, namely the focus (client versus costs) and the nature of employees. These key differences could potentially raise problems when a charity attempts to introduce a marketing discourse and could result in interdiscursive tensions when the two discourses interact.

For-profit organisations were regarded as cost focussed whereas charities were considered to be client focussed. The for-profit perspective related to a strong economic discourse. An Arana service provider considered ‘... *its money and numbers isn’t it, and to me ... the for-profit is where they can cut costs, or it seems, cut costs at every turn ...*’ (AK60), whilst a middle manager who had previously worked in a for-profit setting commented ‘*profit driven organisations are exactly that, they are there to make a profit for shareholders and usually at any cost, from what I have seen, I have seen a*

lot of people sell their souls to get to where they were and do what they do, but ... [charities] are here to help people as much as [they] can' (AE68). Likewise, it was regarded that even when service recipient clients were required to pay to receive services, a charity would aim to simply cover costs - *'...charges ... are usually just to cover wages or just the small programme fees ... not actually trying to gain a profit from these people gaining the service'* (AF67). The economic model used by for-profit organisations was regarded as more beneficial to owners compared to the charity model which is perceived as service recipient client focussed - *'... big businesses would be really aiming towards that profit at the end of the year; and obviously they have some sort of bonus scheme involved where they may get bonuses; well [charities] don't work that way'* (AC105). Staff within for-profit organisations were regarded as being better paid and having less workload than staff in charities. The charity staff were considered to have more heart - *'I find that the staff in a charity will tend to have people that, you know, have more of a heart ... and also do more, I feel [put] a bit more sometimes into their work as well'* (AG52). This view is in keeping with the view that charities are more service oriented and client oriented than for-profit organisations.

A service perspective is regarded as a key component of a market orientation (Vargo & Lusch 2004a). Arana employees, particularly service providers, considered that a traditional charity offered a more client focussed perspective than a for-profit organisation - *'... I think non-profit tends to try and focus more on the quality of service and the needs of the [service recipient] clients. I like to think that anyway'* (AK61). This suggests the traditional charity does in fact contain at least some level of the service element of market orientation. However, most charity employees tend to think more so about their service recipient clients rather than their donor clients.

5.3.1.3 Shifting boundaries : a competitive strategy

Respondents typically considered the traditional charity discourse could survive, *'but only in limited pockets of areas [such as if] they have got neighbourhood support'* (AO61). The church-based charity was regarded as most likely to survive as *'nobody else will go to that trouble of working or, for example, running a whole team of volunteers'* (AF104). However, there was a general view that the traditional charity discourse needed to change and become more market oriented to meet the needs and changing dynamics of the modern environment. Thus, there was general acceptance for the need to change. This is evidence of acceptance of the need for a discursive shift away from the traditional charity discourse. Having said this, as will be discussed in the following pages, aspects of the charity discourse were regarded as an indispensable legacy. This is exemplified by the comments that *'...we are operating in an open market so we need to be a business as well as a charitable organisation at the same time'* (AM99) and also *'... look at places like Mission Australia, you know, huge employers, Salvation Army, they still have their fundamental charitable ethos behind them, but they are competing in the real world ...'* (AB41). This charitable ethos is central to Arana's identity irrespective of any move to a marketing discourse.

Whilst the need to change is generally recognised, some of this change is evolving either without recognition - *'I think they are changing in many ways without even realising that they are'* (AG66) or with very little recognition - *'I think a lot of them probably already do evolve in some way. I think you see a lot of them now ... you see Anglicare and Mission Australia are doing a lot more than what they used to do'* (AH86) in regards to service offerings and funds generation. Evidence of the need to change is emphasised by the fate of some charities that did not try and change - *'...they*

do need to make changes ... a lot haven't been able to make that transition, be able to accept the changes... [some] just weren't able to change or just didn't want the change and unfortunately they folded or merged' (AE75).

Key issues driving the general acceptance of the need for some level of discursive change relate to the changing environment, identity, image, and the nature of relationships. The changing environment in itself is affecting the viability of the traditional charity - *'it's very competitive'* (AJ69). The traditional charity is also suffering from a less than optimal corporate identity and image - *'its ... about the image they have within their target markets ... there is ... a lot of negativity from the media, you get these days about charities clawing back so much for administration costs'* (AJ79). Donor clients want a different relationship with charities to which they donate, they desire confidence and satisfaction that their donations are being utilised efficiently and they perceive some of the older charities as less than efficient and want improved 'business' practices. Thus, almost by default, a more market-oriented discourse is becoming required and expected of charities.

5.3.1.4 Discourse transformation : Market Orientation via a Social Entrepreneurship Model

A key issue in this thesis is how a charity and its employees change and adjust when a marketing discourse is introduced. Following-on from the previous sections that discussed Arana's general acceptance that traditional charities need to change in some way to meet modern requirements and demands from society, it is apparent that Arana has adopted a social entrepreneurship model to achieve its own unique style of market orientation as will be discussed in the following paragraphs.

The new discourse within Arana is a hybrid discourse of market orientation (via a social entrepreneurship model) as well as new managerialism. Whilst entrepreneurialism is typical of many for-profit organisations, within the charity context it is referred to as 'social entrepreneurialism' and offers new money generating alternatives for charities. As indicated by Arana's CEO, social entrepreneurialism is '*something that is quite new*' (AB377) and is about '*creating capacities for growth within the business world outside of the purely funding context. And delivering those surpluses or profits back into furtherance of ones mission*' (AB359).

The CEO's view is similar to various researchers including Mair and Marti (2006, p. 37) who define social entrepreneurship as a process that involves 'innovative use and combination of resources to pursue opportunities to catalyze change and/or address social needs'. Likewise, Brooks and Morris (2005) regard social entrepreneurship as 'new and novel mixes of opportunities, challenges, ideas, and resources in pursuit of potentially explosive (non-financial) rewards'. Another, more pragmatic approach simply involves not-for-profits involved in for-profit activities to cross-subsidise core not-for-profit activities (Dees *et al.* 2001). Entrepreneurs aim to develop lasting improvements in the field (Waddock & Post 1991) and are innovative and persuasive in attracting extra resources to achieve their goals (Sargeant 2009). In addition, it is considered 'that entrepreneurship has a legitimate role in non-profits and the work environment can be designed to enable various levels of entrepreneurship' (Morris *et al.* 2007, p. 12).

The introduction of a market orientation within Arana has been enacted via a more formal management structure than previously existed. The new discourse thus contains components of 'new managerialism' which has been defined by Davies (2003, p. 91) as the removal of power from practising professionals and the placing of power in

the hands of auditors, policy makers and statisticians ‘none of whom need know about the profession in question’. New managerialism has a ‘concern for efficiency, cost-effectiveness and competition’ (Gewirtz & Ball 2000, p. 256). Emergence of new managerialism discourse is associated with ‘new icons such as outcomes and missions, and new rituals to enshrine them including corporate planning, performance evaluation and new fiscal accountability arrangements’ (Sinclair 1996, p. 234). These changes have to an extent resulted in incorporation of management techniques from for-profit businesses (Meyer 2002; Vickers & Kouzmin 2001) resulting in the transformation of charities into businesses. Managerial reform within the not-for-profit sector (including charities) in Australia has to some extent been driven by government policies to offer an increasing range of funding to private organisations to deliver services that may have previously been delivered by government agencies.

Arana has been very successful in introducing money-generating ventures that differ from those traditionally expected of charities. As indicated by the CEO, it has *‘taken off in terms of selling and generating profits and it now funds our whole clinical services wing for the organisation’* (AB382). This increased independence and autonomy is totally different to the historic fund-raising approach of traditional charities and enables Arana to be *‘less reliant on government funding and more able to generate our own income ... we are not tied to using it specifically on government driven outcomes, we can do good works ... of our own choosing rather than a prescriptive approach from government’* (AB106). Whilst Arana do rely on government for some funds, the fee-for-service division has enabled Arana to step outside some of the constraints and control of government associated with government enforced ‘new managerialism’. As indicated in Table 5.1 earlier in this Chapter, the success of Arana

following the introduction of a market orientation has been solid income growth, with revenue increasing from \$8.5 to \$15.4 million in two years.

5.3.1.5 An economic model for revenue raising

The move to become more businesslike and market oriented has shifted the emphasis away from fund-raising (the typical charity discourse revenue generation mechanism), towards more businesslike revenue raising methods, namely tender winning, and social entrepreneurial activities such as the for-profit division. This trend by Arana towards non-traditional fund-raising and targeting government grants via tenders has resulted in a need to develop formal business processes to deal with the government grant providers. The government departments have become more discerning in the provision of grants and have ‘... *moved to a competitive tendering model*’ (AB481) with ‘*competition policy within the sector [being] the big driver of change*’ (AB464) and thus a strong influence and driver of a discursive shift within the sector. A large amount of activity within Arana is thus now aimed towards formal tendering for government contracts. Winning of tenders involves professional tender writing and developing appropriate cost-efficient service delivery infrastructure, quality assurance systems and relationship building – all characteristics of marketing and managerial discourses. Charities are unique relative to for-profit organisations in that charities have dual client bases – not only the service recipient clients who receive charity services, but also donor clients who provide the funds (including government who typically provide grants). The increased emphasis on targeting government for large funds has increased the need to be more formal and accountable.

5.3.1.6 Existence of the four key dimensions of market orientation

Lafferty and Hult (2001) suggest there are four key dimensions of a market orientation - emphasis on customer, importance of information, interfunctional coordination and taking action. These are the criteria utilised in this thesis to identify a marketing discourse. There is evidence that all of these four key dimensions (to varying extents) exist within the new Arana discourse. Whilst service provision has long been the aim of Arana, there appears to have been a discursive shift towards even stronger service provision that is '*... prompt and quality care and very [service recipient] client focussed ... we try and look very closely at each [service recipient] individual's needs ... because everybody is similar, but everybody is very different*' (AK37). This 'emphasis on customer' and meeting client needs is a feature of a market orientation.

Gathering, analysing and disseminating information are basic components of a market-oriented organisation. Arana does not however, at least as yet, have a totally formalised information management system. '*Probably not well*' (AB200) is how the CEO suggests Arana currently use information and that '*we probably will take a more structured approach to it in the future ...*' (AB201). Arana's strong emphasis on quality measurement and quality delivery that in part is a response to requirements from government funding providers has resulted in introduction of numerous surveys to gain feedback. The surveys cover service recipient clients and their family members, other service providers, staff, competitors and funding bodies. Arana also typically gather information via attending meetings and networking. As indicated by the Chairperson, '*gossip is terrifically important, I am not joking, gossip is terrifically important*' (AL279) whilst a senior manager indicated Arana '*have got enough staff that we can go to a lot of different meetings, information sessions etc. ...*' (AA275) and a middle

manager commented that *'... a lot of us are on boards of other organisations, so you get insight into how those organisations run, we network really well'* (AD317). Thus, Arana do acknowledge the 'importance of information', a key dimension of market orientation, but also acknowledge they need to improve their practices.

There is strong evidence of a more structured and formal decision-making process within Arana than previously existed. This 'interfunctional coordination' is not only a key dimension of market orientation, but has also been utilised strategically by Arana to assist in implementation of the new discourse. Activation of Arana's new strategy has been successful in growing revenue and service provision. To ensure delivery of quality services, there is strong emphasis placed on staff training – *'I have never worked at another organisation that promotes training as much ... we ensure that all our direct care staff which is where the service is produced are really well trained'* (AD111). Thus, there has been a change in subject position for employees, from relatively untrained, to more well-trained and hence being in a better position for 'taking action', a key dimension of market orientation. The use of training to change employees' knowledge, attitudes and skills is a key tactic utilised by management to assist with discourse transformation.

5.3.1.7 Elements of relationship marketing

As indicated above, all four key dimensions of market orientation now exist to varying levels within Arana, which indicates a shift to the practices of a marketing discourse. Arana is characterised by a strong relationship marketing perspective that has to some extent developed due to the emphasis on tendering for government grants. Relationship marketing was regarded by a senior manager as the key to success – *'If you*

don't have a good relationship with your clients, you are not providing good service, you are not likely to then have a good reputation to pick up extra funding, so, for me, that is probably the simplest and easiest gauge to look at an organisation that is going forward, and is getting the best results' (AA607). Likewise, the Chairperson regarded relationship marketing as essential to win government contracts, where the majority of funding for Arana comes from - *'... for the bulk of what we do, whether the public is aware of our existence or not, is really neither here nor there. The fact that the government bureaucrats are aware of what we do is terrifically important'* (AL33).

A key trend within both State and Federal Government in Australia is to utilise various charity organisations to provide services to the community rather than government agencies providing direct service delivery to the community. This to an extent has resulted in a change in discourse practices, with charities now able to gain grant funding from government if they are sufficiently entrepreneurial to develop the capabilities to tap into the funding. There is now more government dependency on charities to be able to deliver services to the community, with the more progressive and entrepreneurial charities developing relationships with government and placing themselves in better positions to win funding than other less entrepreneurial charities. As indicated by the Chairperson, *'there actually aren't many people around who have services for sale, and we know we are good at what we do, and government knows we are good at what we do ... we are as dependent on them as they are upon us. So that is the sort of relationship [we have] with the various funding bodies. It's a bit of a dance'* (AL284). The Chairperson's reference to *'services for sale'* is further evidence of a social entrepreneurialism position and the relationship between government and Arana and, as commented by the Chairperson, indicates that there is a mutually reliant relationship between the two parties.

This relationship is further explained by the Chairperson who indicated that :

sometimes they will approach us, other times we will be much more involved in a tendering type of situation, ah, but even within the tendering situation there is a lot of stuff going on in terms of ah, nods and winks and being told what is preferred and what is not preferred and briefing sessions and attempts to make, manage the process rather than simply put it out there and see who sticks their hand up ... that is the marketing that for me is most important, that is where the millions and millions of dollars come from. (AL288)

Thus, the social entrepreneurship exhibited by Arana in the new discourse is a key to their revenue-raising activities and relationship marketing is regarded by the Chairperson as paramount in progressing a strong ongoing relationship with the government revenue providers.

5.3.1.8 Interdiscursive tension

Whilst a marketing discourse has been introduced, this has not been at the expense of maintaining the charity ethos. This key aspect maintained from the legacy discourse is exemplified by the comment from a middle manager that *'people who are for profit are focussed on the client, but not at the expense of the business, whereas sometimes in not for profit they can [do things at the expense of the business] ... because that is what we are here to do, look after the [service recipient] clients'* (AO285). Thus, whilst a businesslike approach is typically perceived as being very cost oriented and efficiency based, the over-riding driver of Arana, even after moving away from a traditional charity discourse to a marketing discourse is still looking after both donor and service recipient clients.

Whilst there is recognition that the organisation needs to become more businesslike to survive, there is acknowledgement that this cannot be at the expense of the traditional charitable ethos. As indicated by the CEO, whilst the 'heart and soul

drivers' remain, the changing society has resulted in a need to 'find new ways to achieve our ends' (Arana 2008, p. 4). A 'challenge is to hold to our community sector values and ethos whilst still meeting contemporary challenges such as those inherent in competition policy. Although we need to be businesslike and entrepreneurial we shouldn't aspire to be just a business or just an enterprise. The community sector has at its heart a very different values system to the commercial world ... [and] it is important that we continue to honor this heritage ...' (Arana 2008, p. 6). Thus, Arana wish to strongly maintain their ethos from the charity discourse of keeping an emphasis on people, the human relations aspect, but still also want a more businesslike approach. This interdiscursivity with a desire to hold on to fundamental aspects of the legacy discourse, resulting in attempts to integrate and amalgamate aspects of the old and the new hybrid discourse, has caused some ongoing tensions.

An example of the organisation providing exactly what the service recipient client requires - a remnant of the legacy discourse - relative to what a for-profit organisation may offer is described by a senior manager who indicated that:

we provide in-home services to people with physical disabilities, so we go in, do the showering, everything in the morning, get them ready and they go off to work, school or whatever, so we provide that service at the time they request, 7 o'clock in the morning. There are some organisations similar to us who those people are just on a list and one person will go and shower the whole lot throughout the day. So that person who really wants their shower at 7 o'clock in the morning, may not get it till 3 in the afternoon. So I think that client centred service has to be the number one. And I think that is why a lot of people keep coming to us and saying well, you know, the service down the road, and I won't mention it, you know, they won't give me service till 3 in the afternoon, I want mine at 7 o'clock in the morning, what can you do? And we will recruit more casual staff to make sure that we can provide that at the right time of the day to suit that person. (AC455)

This is an example of staying true to the over-riding values of Arana and maintaining a focus on client service in keeping with the legacy discourse. As indicated

in Arana's Annual Report, the CEO comments - 'We have come to understand that while commercial organisations may undertake marketing to make sales, what is really important to us is how we are perceived by our stakeholders, these being our [service recipient] clients, partner agencies, funding bodies and the wider community' (Arana 2008, p. 6). This once again follows the theme throughout Arana that they perceive their marketing activities to concentrate on communication and relationship building. Further comments from the CEO regarding Arana's perspective on marketing is that they consider *'marketing in the not for profit sense is slightly different, it's not just about building sales, it's about promoting your organisation, selling its attributes in a range of areas with funding bodies, with stakeholders, [service recipient] clients and families that might use your service and with other community agencies to build partnerships and relationships ...'* (AB431). This is similar to the views of a senior manager who commented that *'... we need to be out there working with all the different stakeholders and the community groups and raising our profile'* (AA283).

5.3.1.9 Marketing perceived as communicative

During the interviews it was apparent that many employees did not fully understand the term 'marketing'. This is likely to be part of the reason that some employees were somewhat sceptical of the use of 'marketing' by Arana. As indicated by the CEO, *'I don't think it's necessarily a lack of willingness on the part of staff as much as a lack of knowledge and perhaps just a little lack of insight of what it all means to the organisation as a whole'* (AB95). When asked what respondents perceived marketing to be, typical responses from service providers tended to focus on the promotional aspect of marketing, namely *'building awareness'* (AD94), *'... publicising ... how we present*

and provide services' (AK102), *'... getting your message across in the right way, and to the right people.'* (AH150). In other words, many employees perceived a communicative approach to marketing, and some were unaware of the other aspects of marketing. The lack of full understanding of marketing by Arana respondents is similar to findings from other not-for-profit researchers including Pope, Isely and Asamoia-Tutu (2009, p. 191) who discovered that employees were not clear regarding 'what marketing meant'.

The use of marketing by Arana raised some interesting and mixed views amongst employees. Whilst marketing was regarded by some as applicable for use within not-for-profit organisations, others had a rather cautious and apprehensive view. Indeed, even those who had a positive view of marketing tempered this by indicating resourcing was an issue as typified by the comment - *'I think some of the fundamental aspects of marketing are sound so why not use them, but once again it has to come back to the cost benefit'* (AJ504). This reference to cost is a legacy of the traditional charity discourse where funding was always considered to be tight.

The notion that marketing can be utilised by not-for-profit organisations is exemplified by the Chairperson of Arana commenting - *'Oh they are. Look at Barnardos, they make you cry, those TV ads, and Vinnies, Smith Family, that stuff is just awesome ... that is brilliant. Very, very professional stuff'* (AL402). The 'promotion' component of marketing is the most visible aspect of marketing and perhaps the most effective component of marketing in relation to revenue-raising. Likewise, a senior manager indicated that *'you would be mad not to be looking at all sorts of different sectors and trying to pick out the best of all of that, and how to apply it to not-for-profit and I think that is what we certainly attempt to do'* (AA390).

The mixed acceptance of marketing within Arana is recognised by the CEO commenting that:

there are varying views on marketing within the organisation, I think that some people really understand the change in the not-for-profit sector, understand that we need to, really attend to our image and identity as much as to the substance of our services in order to continue to grow and survive in the current environment ... I think there are other people who would see us as still very much a social welfare organisation, where our focus is just on the client, the rest of it is kind of frivolous or less important. So we have got those two extremes ... The balance is probably somewhere in between, yes, our heart and soul stuff is still about our client service delivery, but we need to make sure that we are communicating our heart and soul stuff to the rest of the world' (AB 445) and that '... there are parts of the organisation where we are still very much in the traditional service provision role, where that is the centre of the universe and the point of marketing isn't quite seen or is not quite as obvious. (AB70)

These comments by the CEO indicate that various employees prefer to stay within their previous subject positions, particularly the service employees. Given that service provision is a key component maintained from the legacy discourse, it is likely that these specific employees can to a large extent maintain their subject positions as service providers without any need to concern themselves with use of marketing by management. It tends to be the employees in the more managerial positions (typically new subject positions and roles in the new discourse) that are more amenable to the use of marketing. The differing views from different subject positions are not surprising as there are typically 'unique perspectives and experiences' (Fiol 1995, p. 71) within particular subject positions which can differ from other employees with different subject positions in the organization. Introduction of the marketing discourse by Arana fits well with Arana's existing services orientation. It is the more explicit and visual aspects of marketing that are somewhat contentious and less accepted by some Arana employees.

Typical of comments from the pro-marketing employees were - '*... I think it's great, I think that just because you are not for profit, it doesn't mean that you can't*

market or advertise what you do ... (AI103), *'... don't think it's enough, I don't think it's promoted enough'* (AD252) and *'... we need to get ourselves out there and get our good news stories especially across'* (AN221). It was also recognised that there is a distinct trend towards greater acceptance of marketing - *'... we have gone from sort of just, um, piecemeal stuff to really looking at the best way of marketing ourselves ... So there has been a little bit of a mind shift'* (AC299).

However, comments from respondents who were against the use of marketing by Arana include - *'... I just think it's a bit ... wanky!! ... I hate all these tag lines and razzamatazz and corny stuff, its like America, all that. I suppose I just see it as a bit superficial I suppose, but then I suppose you have to have some of that, but yeah, I see it as a bit pretentious but then, how do you, how do you survive in a world that is heading a certain way I guess, you have got to try ...'* (AK321). Thus, even those against use of marketing within Arana tended to concede that some form of marketing was needed.

The views of many within Arana regarding marketing can be summed up by the comments that *'I think you have to be very, very careful ... with how much it's costing, because I guess marketing can be, can have a huge cost ...'* (AF327) and *'there [are] some members who are still a bit, not reluctant, but just a bit apprehensive to [use marketing] because they see that it seems like it's a very business oriented thing to do and they are a bit fearful that it will take away from client services maybe'* (AI146). These comments tend to indicate that Arana employees are unaware and/or uneducated regarding the potential long-term benefits to Arana of sound marketing practices. The over-riding influence on Arana employees is the delivery of client services, which is also a legacy of the traditional charity discourse where the 'here and now' was paramount. The majority of Arana employees perceive marketing to simply be the

visual, promotion aspect of marketing, rather than the relatively implicit aspects that have indeed been introduced into Arana within the market oriented discourse.

5.3.2 The New Position and Role of the Speaking Subject

Whilst the elements of an organisation are made up of ‘roles’ (Harré 2002, p. 114), these roles are fulfilled by employees. The changes within Arana and the accompanying change in roles have significant implications for employee identity. In a new discourse, people are expected to behave and act differently than they did in a legacy discourse. Consequently, an employee’s ‘individual identity comprises multiple, shifting subject positions each situated in different discourses.’ (Motion & Doolin 2007, p. 65). Elements identified and discussed within this section are the increased level of professionalism required of employees, the new organisational identity, the tension resulting due to employees being expected to move to new subject positions, linkages with the legacy discourse, and the differing subject positions taken by employees regarding competition.

5.3.2.1 Towards professionalism

A key to any discourse change is new subject positions and roles (Foucault 1991). Positioning refers to ‘the constitution of speakers and hearers in particular ways through discursive practices’ (Wood & Kroger 2000, p. 100) and any change in discourse within an organisation is likely to result in a change in subject position and role for many employees within the organisation. Not only has the social entrepreneurship within Arana resulted in greater commercial activities in relation to

revenue raising, but also the not-for-profit divisions have become more businesslike and professional. This is due to Arana recognising the need to change away from a traditional charity discourse to survive in the modern environment. The new marketing discourse introduced has particular emphasis on high-level service provision from the legacy charitable ethos. This is typical of what other charities are currently trying to do as well. As indicated by Arana's CEO, '*... some of the older charities have really changed quite substantially. While they still have somewhat of a traditional ethos, some of their service provision has become quite different*' (AB39).

Whilst volunteer staff are typical of the traditional charity discourse (and seen as less professional and less expert), the new discourse within Arana contains more professional, fully-paid staff. The shift from volunteerism towards professionalism is also recognised by regular training of the employees. This indicates a change in subject positions/identities within the organisation. The employees no longer see themselves as similar to employees in a traditional charity as indicated by a comment from a middle manager - '*the way we look at it, its much more professional, we take it very seriously, its not something we do in our spare time ...*' (AC88). The CEO commented that '*we certainly choose to be quite businesslike in our approach*' (AB46) which indicates evidence of a conscious shift to a more businesslike/professional style of discourse operating within Arana. Also, Arana has deliberately aimed to use practices from outside the traditional charity sector as indicated by a senior manager commenting that '*by looking outward as well, there was a real push to look at other sectors, the business sector to see their best practices and try to adopt that*' (AA592).

An external consultant was also utilised to assist with '*new position descriptions ... KPI's and personal development programme[s]*' (AN252). The employees were thus trained in the new discourse and associated practices. This is a key phase in discourse

transformation (Fairclough 1992; Motion & Leitch 1996). The ‘new managerialism’ can present challenges for employees who suddenly find themselves in new positions and roles within the newly introduced discourse. Davies (2003, p. 91) suggests that new managerialism ‘may well involve the most significant shift in the discursive construction of professional practice and professional responsibility that any [employee] will ever experience’ and a key problem with new managerialism is that employees are expected to be guided by targets rather than what is actually appropriate and necessary (Boyle 2002). This can thus create conflict for the employee between the traditional care for service recipient clients versus the newly introduced KPI’s typically based on productivity and thus within new managerialist systems employees ‘sense of their own value is no longer primarily derived from responsible self-conduct and competent knowledge and practice of professional knowledge’ (Davies 2003, p. 92). Likewise, the sheer amount of required reporting can place pressure on employees (Davies 2003). The drive towards increased professionalism has in part been a response to requirements from government funding bodies regarding accountability in use of funds. In fact, Australian Government regulators are swamping charities with multiplicities of reporting requirements, micro management and significant compliance burdens (Productivity Commission, 2010).

To reinforce the more professional attitude required of employees is the ‘physical evidence’ surrounding Arana’s operations. From an aesthetics perspective, Arana consider that there is now general acceptance within the community that a charity should change its appearance - *‘in the early days a charity wasn’t meant to have a nice office ... there is an understanding that now charities, to do good work, need good people and need to provide good working conditions’* (AA95). Likewise, a move into a new building by Arana resulted in the comment that *‘I think it presents a professional*

image ... it gives the [service recipient] clients the impression that we know what we are doing' (AD279). 'Physical evidence' is one of the 7P's of services marketing (Lovelock *et al.* 2004) and is clearly recognised and utilised by Arana. As well as the physical appearance changes within Arana, '*a lot of the changes ... have been cultural – the way the organisation sees itself, the way the organisation presents itself and also the way people feel about working within the organisation and how they portray it to other parties outside the organisation*' (AJ93). This is clear evidence of a change in subject positions amongst Arana employees and an indication of a discursive shift (Foucault 1991). Marketing was previously almost non-existent, but is now a key aspect of Arana. '*I don't think we ever really did that much marketing in the past*' (AH171).

Within Arana, there has been a distinct shift by employees concerning the subject positions of service recipient clients. Employees perceive themselves as no longer operating a charity, but more of a service and support agency, thus giving employees a new perspective regarding their service recipient clients. This is typified by the comment from a service provider that '*we are not feeling sorry for people and giving to them, without any sense of commitment on their behalf; I don't think of [Arana] as a charity as such. But more assisting in, developing the person, so providing support and assistance in that way*' (AF67). Whilst there has been a conscious shift to a more businesslike approach, a total shift has not occurred, with the charitable ethos still pervading as indicated by the comment from a senior manager that '*charities I think now have come of age in that they operate as businesses, but their goals are different*' (AA110) to a typical for-profit business. When comparing the 'old' and the 'new' Arana, a middle manager indicated '*... its more reliable, its more robust, its more professional, there is more information, there is more communication ...*' (AO109). This increased use of information and communication is characteristic of market

orientation (Lafferty & Hult 2001). This introduction of professionalism and use of information and communication has in itself resulted in employees needing to occupy new subject positions in the new discourse. In other words, the way employees go about conducting their activities on a daily basis has changed.

5.3.2.2. *A new organisational identity*

Organisational identity is concerned with what an organisation means, its position relative to other organisations, and how it is produced, reproduced and resisted through discourse (Ainsworth & Hardy 2004; Phillips N & Hardy 1997). A key strategy utilised by Arana management to assist the discursive shift both internally and externally involved a program to carefully develop Arana's identity. To successfully develop an organisational identity involves communication of that identity to the target audience. The identity program was aimed to 'change corporate culture and determine the conduct of organizational members' (Motion & Leitch 2002, p. 46). The new identity program was driven by a newly formed 'Identity and Image Committee'. Key activities related to development of a style guide, improved consistency of logos and marketing collateral - '*Prior to that - It was all over the place*' (AJ194), media training, a business development manager (for the for-profit division) and visible branding (vehicles, uniforms). Development of the style guide was a key factor to introduce consistency. The aim of introduction of the new identity was to assist to emphasise to employees that a new mode of operation was being established within Arana and thus the 'base' was being set. These 'common starting points' (Motion & Leitch 2002, p. 59) enabled management to assist the positioning of all employees within the new discourse

and imposed rules and boundaries (Motion 2005) within which the discourse was to operate.

Technologies of production (including style guides) are technologies that 'permit us to produce, transform, or manipulate things' (Foucault 1988, p. 18). In this case, management is aiming to transform and manipulate the discourse within Arana. Thus it is being utilised to introduce marketing concepts and practices. This goal appears to have been successful as evidenced by the comments from middle managers that '*... now I am talking the language ... it has been about being professional ...*' (AO239) and '*I think the major change I have seen over the last few years is actually getting everything that we do to be consistent ... things that we put out into the public ...*' (AH155). Similarly, increased visible branding including uniforms has been successful - '*I am very big on uniforms ... I think it presents a very good corporate image of success and it shows that you have taken a bit of pride in what you do*' (AM278) and '*they love it, I mean [uniforms], they want to be able to promote the service and ultimately the organisation wherever they can, it helps us to identify who we are*' (AJ250). The positive attitude towards the uniforms not only enables the employees to identify with the new identity that Arana is developing but the new over-riding discourse as well.

To assist with the development of a new corporate identity, a new purpose statement - 'creating an inclusive world' - was developed and well received - '*I think if you have a by-line or a catch phrase that people can hook, catch on to, that says something really valuable, and that is what we are really all about, you get a lot of value out of it if you use it right*' (AJ480). Introduction of the new purpose statement assists in positioning the new organisation and thus aids the introduction of the discourse transformation. The purpose statement does also fit with the legacy charity

ethos and is in keeping with the views of Ziegler (1989, p. 8) who considers '[d]evalued people will be better seen as individuals if they are not removed from the rest of the community and not grouped with other devalued people'.

5.3.2.3 *Tension with new subject positions*

As indicated above, the organisation has definitely changed and become more businesslike, professional and market-oriented in response to management's goal to achieve a discursive shift in order to survive in the changing social landscape. The change to a marketing discourse was 'sold' to the majority of employees but some staff did not like the new social entrepreneurship discourse introduced into Arana. It was suggested by a young middle manager that the employees who did not like the change were '*set in their ways, the way that they operate*' (AN180) whilst a senior manager suggested loss of some staff was not a bad thing as they '*were struggling for some time with the pace of change [and] in some ways they [were] stifling the progress of the organisation*' (AA149).

Employees will 'position themselves within prevailing discourses' (Jorgenson 2002, p. 353) as they consider appropriate and also acceptable to management. If, however, employees cannot find an appropriate position within the presiding discourse they are likely to leave. The main reason for staff leaving and thus not accepting new subject positions and roles within Arana was perceived as due to not liking the new businesslike direction of the organisation - '*a basic kind of ethics level disagreement*' (AO104) as well as increased pressure on employees to perform - '*we do have to operate a lot more effectively as a business ... it used to be almost like a drop in service, and they only sort of potter along, whereas now we have to be a bit more efficient in what we do*' (AE160). The comment regarding '*a basic kind of ethics level*

disagreement' with the new discourse indicates that the new required subject positions and roles challenge the individual beliefs of the employees. If management is unable to 'sell' the new discourse to employees that question the new discourse, there is going to be ongoing contestation of the discourse if such employees choose to stay rather than leave the organisation. There was also resistance to the introduction of key performance indicators that were perceived by some service providers as being too quantifiable rather than qualitative - *'that warm buzz, that fuzzy feeling from what we do ... sometimes can be taken out of it with all these, you need to reach these statistics, you need to reach these levels, this is what we want from you, we want stats and numbers ...'* (AG217). For example, no longer reporting *'this person felt better'* but having to report *'20 hours, 30 hours, \$10 profit ... I think they are resistant to being measured in that way, from an ethics point of view, its just too numbery, its too cold, too hard'* (AO190). This resistance to a more cost focussed style of measurement in favour of a more service recipient client focussed approach is a legacy of the respondents' perception that a key difference between a traditional charity discourse and a managerial discourse is a focus on costs rather than service recipient clients.

Individuals can hold multiple subject positions, some of which may be contradictory (Jorgenson 2002) but can be reconciled by switching positions as appropriate. Whilst some employees resigned due to Arana *'changing the model of being a community based organisation to a business'* (AM149), those who stayed considered the new model did in fact contain the essential (legacy) aspects of the old discourse. As indicated by a middle manager - *'our visions and values still hold strongly, but we still need to be competitive in the market ... there is I suppose some sort of compromise in some areas ... I think we have stayed true to our visions and values whereas [those who left] didn't ...'* (AM152). Despite the move to a more

businesslike approach, Arana employees, particularly the service providers considered they were still different than typical for-profit employees in that they were very service recipient client focussed and caring for their clients, with cost issues secondary. Typical comments from service providers within Arana included - '*...if you didn't care, if you didn't have those qualities you really wouldn't be in our industry ...*' (AG59) and people in not-for-profit organisations '*can be a little bit more compassionate and more towards the needs of individuals*' (AN314). There is generally less opportunity to talk so openly regarding emotions towards clients in a for-profit discourse.

The introduction of social entrepreneurialism into Arana resulted in a range of functional divisions – some divisions still operating purely as not-for-profit, with a new division operating as for-profit '*commercially driven*' (AB201) to provide services such as lawn mowing, with the revenue used to assist funding the not-for-profit divisions. This has however resulted in differing perspectives from employees in different subject positions within the new hybrid discourse. Employees in the for-profit division accept the need for marketing, whereas service providers in the not-for-profit division tend not to.

Despite some resignations, it was perceived by employees that there was little resistance to the changes due to the consultative/collegial manner in which management worked together with employees to drive the change. There '*was a real openness from management which was wonderful and made me proud to actually work for Arana*' (AM136). Whilst resistance can occur during discourse transformation, the consultative approach minimised resistance and actually involved all employees in development of the new discourse 'as authors of texts' (Maguire & Hardy 2006, p. 8) that delivered the new discourse. A typical example of this was the use of sub-committees such as the

‘Identity and Image Committee’ that was responsible for authoring the style guide that literally dictated aspects of the new discourse.

5.2.2.4 Linking the discourses

‘Emphasis on customer’ is regarded as a key dimension of market orientation (Lafferty & Hult 2001), and the service providers within Arana pride themselves in being service recipient client focussed, perhaps suggesting that the traditional charity (legacy) discourse does in fact possess this component of market orientation, albeit with different language - customer versus client. The continuation of a client focussed service ethos from the legacy discourse to the new discourse containing a market orientation is a common denominator between the two discourses and is utilised by management as a tool to sell the new discourse. This interdiscursivity is a strategic link for management. However, the traditional charity discourse does not contain the other three dimensions of market orientation, namely ‘importance of information’, ‘interfunctional coordination’ and ‘taking action’. It is contended that the respondents’ perception of their more client-focussed approach relative to employees in for-profit organisations likely relates to their ‘caring’ aspect based on the charity ethos.

5.3.2.5 Competition from other charities – varying perspectives

Competition is a typical factor within a business environment and the new discourse within Arana required competition with other charities for government funding and has resulted in new roles for many employees. Arana employees have varying views regarding ‘competition’ depending upon which division of the

organisation they work in and thus their varying subject positions. At one end of the spectrum is the view from the manager of a for-profit division that strong competition exists against both other charities as well as for-profit organisations - *'... we are a business ... we have to operate effectively as a business on a daily basis'* (AE274). At the other end of the spectrum is the view from a service provider in one of Arana's non-for-profit divisions that *'I don't regard other organisations as competitors at all. I regard them as a colleague, an ally, somebody who is on the same platform ...'* (AF220). In relation to competing for tenders (for the non-for-profit divisions) there is recognition that competition exists but *'it's a very civilised competition and often a very friendly competition'* (AL358) and that *'it's a double edged sword, they are a competitor ... but also because of the sector we are in ... we work closely together in other ways to better the sector ... we scratch each other's back up to a point but there is that competitive aspect to it'* (AJ322). Whilst Arana have adopted a social entrepreneurship model, this model is more applicable to the revenue generation components of Arana's operations than the service delivery aspect and its acceptance within the organisation is thus to a large extent dependent upon subject position.

In summary, employees were required to take on and accept new subject positions and roles. This is a key identifier that a discourse transformation has occurred (Foucault 1991). The majority of employees either readily accepted, or over time accepted the new requirements, but a minority of employees could not accept their new required positions and thus left Arana.

5.3.3 The New Mode of Functioning of Language

Changes in language use are associated with social change. Indeed, much social change is in fact ‘constituted to a significant extent by changes in language practices’ (Fairclough 1992, p. 6). Extension of marketing into new areas has traditionally resulted in restructuring and reconceptualising of activities and ‘profoundly affected the activities, social relations, and social and professional identities’ of employees with a major part of the impact ‘comprising changes in discourse practices, that is, changes in language’ (Fairclough 1992, p. 6). Thus, introduction of new language into Arana by management can assist and drive introduction of a new desired discourse. Use of language is part of what Fairclough (1992, p. 8) terms discourse technologization in which professionals ‘research, redesign, and provide training in discourse practices’.

The typical words now used within Arana on a daily basis provide evidence that a discursive shift has occurred. The new discourse has been colonised by words characteristic of a marketing discourse. Typical words now utilised by a senior manager included ‘...*our client group ... service delivery ... management meetings ... business and regional development, strategic planning ... economies of scale ... strategic direction ... best practice ... strategic planning process*’ (AB32-592). The introduction of a new ‘language’ within Arana is perhaps summarised by the senior manager commenting that ‘*tendering, expressions of interest, those sorts of pieces of terminology wouldn’t have been around ...*’ (AB517). Language can vary based on the ‘nature of the relationship between participants’ (Fairclough 1992, p. 63) and thus introduction of new language has been a deliberate tactic by management to assist with a discursive shift towards a more professional and businesslike discourse. Whilst a key aspect of the legacy discourse is emphasis on the service recipient client, it is curious

that the term ‘client’ from the language of business is utilised rather than perhaps a less businesslike word such as ‘customer’. Explaining use of the word ‘client’ within the charity sector, the Arana CEO stated that there *‘have been a few changes over the years. We don’t ever use the term “patients” as this implies that [the medical condition] is an illness, which it isn’t. We have used the terms “service users”, and “consumers”. “Customers” implies I think a more distant and commercial relationship although it does carry the notion of “customer service” with it, which would be a positive. It hasn’t taken off in the sector in any case. Personally I think the term “client” implies a respectful but closer relationship’* (AB390). Emphasis on service recipient clients is exemplified by the comments that *‘a [service recipient] client to us is the height of our whole existence ...’* (AJ374) and that, as indicated by the CEO, *‘[Service recipient] clients are the lifeblood of the organisation ... our reason for being I suppose’* (AB239). These comments by employees plus the reference to ‘clients’ in the legacy discourse indicate that some elements of a marketing discourse do in fact exist interdiscursively within a charity discourse.

Given the recognition by senior management that ‘marketing’ is not totally accepted within the organisation, management is using a different terminology, namely ‘image and identity’ as indicated by the CEO *‘we are trying to encourage people and I think we are moving away from the term “marketing” to use the terminology “image and identity building” because that is probably a slightly more comfortable terminology for people in our sector who shy away from the sort of businesslike image of marketing’* (AB75). This is a key strategy to make the discourse transformation acceptable to Arana employees with the CEO deciding to utilise what is viewed as more acceptable language. In this way, the CEO is utilising more neutral and less contentious language as a ‘strategic resource’ (Hardy *et al.* 2000, p. 1228) to ensure strategic discursive

change within Arana. The CEO, by the very nature of their subject position has a 'warranting voice' (Potter & Wetherell 1987) and thus the power and 'clear mandate to speak and act' (Hardy *et al.* 2000, p. 1230) and is aiming to change employee individual understandings (Phillips & Hardy 1997). In other words, via recognition by the CEO that 'marketing' is not totally accepted by some employees, the new wording is being utilised for what is essentially the same term. These views regarding use of marketing need to be considered in the context that Arana employees are rather ambivalent towards marketing and tend not to recognise the full complement of marketing activities and perceive marketing to typically be only communication/promotion.

5.3.4 Circulation of Discourse

As indicated above, new language has been deliberately introduced to assist the discourse transformation. Occupation of subject positions with 'wide legitimacy' (Maguire *et al.* 2004, p. 657) has enabled Arana's senior management to introduce the new discourse with legitimated authority. A key device utilised by management to introduce and circulate the new discourse was the strategy to be more consultative and delegative with use of a collegial style leading to formation of numerous cross-functional committees. Typical committees formed were the - *'Identity and Image Committee ... Training Committee ... Social Committee ... Administration Committee ... Business Development Committee'* (AJ263). The various committees have concentrated on key aspects of a market orientation that have assisted Arana to efficiently introduce the new discourse throughout the entire organisation. To assist in delivery of the discursive change, internal marketing was also implemented and a change in line management structure *'has helped in terms of communication through the organisation,*

getting key messages out' (AB112) and *'people are now I think much more tapped into what we are doing as an organisation, in tune with what we are thinking'* (AB327).

5.3.4.1 Resource priorities – service versus marketing

Whilst the new discourse has been introduced within Arana, a feature is the challenge of reconciling competing priorities and limited resources. The competing priorities are due to aspects of the legacy discourse, namely the preference for service delivery over marketing, and the perception amongst some employees that marketing is costly. This perception that marketing is costly relates to the majority of Arana respondents regarding marketing as communication/promotion. Thus, whilst recognising the benefit of marketing (promotion) as indicated above, there is tension within Arana between spending money on marketing (promotional) activities versus spending money on the more traditional charity perspectives (increased service provision). Although it is not clearly understood in Arana, the services priority of many Arana employees is in fact in keeping with the services dominant logic of marketing (Vargo & Lusch 2004a).

As reported by the organisation's CEO - 'The chief challenge for most not-for-profit organisations is how they deal with competing priorities with limited resources' (Arana 2007, p. 3). Likewise, comments from the CEO included:

my main concern is how you resource and sustain that when funding is very, very tight. Given critical choices between, and I know the value of marketing is that it builds your organisation at the end of the day, don't get me wrong, I'm not downplaying the importance of marketing at all; but given a choice between employing a marketing specialist for the organisation and providing a clinician for the organisation, I'm going to have to say the clinician wins because the impact on the [service recipient] client, the client group is much more immediate and tangible. And that might be a little short

sighted; on the other hand, we are working in an environment where we never have enough resources. (AB331)

This is reinforced by the comment from a senior manager that *'we think the staff would be much more in support of a clinical nurse and a psychologist than a marketing person'* (AA449). These comments by senior management enforce the fact that the services component of the legacy discourse is a vital aspect of the new discourse and does to a large extent over-power some of the newer components of the new discourse such as the more explicit and visible aspects of marketing such as promotion. This is acceptable to senior management largely because the current demand exceeds supply and there is thus no need to spend funds on promotion. It does however ignore the costs associated with other aspects of marketing such as information gathering and analysis that are done by various employees within the organisation, not just by a dedicated marketing resource.

This struggle for funds and the perception of charities having limited resources and never being able to satisfy demand are components of the legacy (charity) discourse that still strongly influence the new discourse. Adoption of a market orientation has benefits on both inputs and outputs to a charity organisation. Inputs relate to revenue generation and the incorporation of a market orientation via a social entrepreneurship model by Arana has improved revenue raising. Use of market orientation by Arana has improved service delivery quality and efficiency. However, whilst it is recognised by Arana senior management that increased marketing resources would benefit the organisation in the long-term, the legacy of the charity discourse to assist service recipient clients in the present is over-powering.

Thus, despite the trend towards a businesslike approach, there is a tension between business priorities and resource allocation - with aspects of the legacy discourse still having priority. Even senior management are wrestling with the concept

of spending money on marketing (promotion) versus adding extra service providers. Also, some sections of the organisation do not require marketing due to an overabundance of service recipient clients and already operating at maximum capacity - ‘... *there are waiting lists for services so actually marketing a service isn’t always a good idea when you can’t actually deliver any more to the community*’ (AB73). Once again, it should be noted that this comment considers only the communication/promotion aspect of marketing, rather than the full gamut of marketing including information gathering which is done via numerous employees within the organisation, not just by any dedicated marketing resource.

5.4 Chapter Summary

Fairclough (2002) suggests that re-structuring is discourse led and thus organisations can achieve strategic change via discourse transformations that aim to institutionalise new meaning. A discourse transformation can be regarded as having occurred if discourse participants act differently and also ‘know’ the world differently than they did previously (Hardy *et al.* 1998; Motion & Leitch 1996), with a change in the way employees ‘write and speak’ (Leitch & Roper 1998, p. 205). These issues are encapsulated in Foucault’s (1991, pp. 56-57) criteria for detecting changes in discourse which have been the guiding principles for the analysis of Arana.

There is strong evidence that a discourse transformation has taken place within Arana in recent years with the four changes that affect discursive formations (Foucault 1991, pp. 56-57) having been identified. There has been a displacement of boundaries of the discourse with components of new managerialism, marketing and social

entrepreneurship being introduced into, and subsequently enveloping and over-riding the previous charity discourse. New subject positions have been introduced, with managers and service providers becoming more professional and more highly trained with less use of volunteers. Van Dijk (1993, p. 254) contends that power involves control, and that 'managing the mind of others is essentially a function of text and talk'. The new language utilised within Arana has in itself constituted a strategic resource for the change. The typical language of business and marketing have been introduced into the charity discourse to 'rename things and people as new kinds of discursive constructs' (Motion & Leitch 1996, p. 299) and are now used in Arana's day-to-day operations. However, to ameliorate or avoid resistance, the recognised negative perception of the word 'marketing' amongst various Arana employees resulted in management utilising the words 'image and identity' instead.

The traditional charity discourse within Arana has been colonised over time and a new discourse has developed, resulting in a change in 'the construction of meaning within the colonized discourse' (Motion & Leitch 1996, p. 299). Associated with the new discourse within Arana is 'commodification' which Fairclough (1992, p. 207) defines as 'the process whereby social domains and institutions, whose concern is not producing commodities in the narrower economic sense ... come nevertheless to be organized and conceptualised in terms of commodity production'. All four components of a market orientation now exist within Arana, which indicates a marketing discourse has been integrated into Arana. There is (continuing) emphasis on the customer, improved structures to obtain and analyse information, communication across the organisation has improved and effective service delivery processes have been put in place - all characteristics of marketing discourse.

A new discourse typically will not neatly replace a legacy discourse (Maguire & Hardy 2006), but will ‘overlap and interact’ via interdiscursivity (Fairclough 1992, p. 124) and is positioned as ‘superior to the legacy discourse’ (Maguire & Hardy 2006, p. 24). For discursive activity to be successfully employed as a strategic resource to implement change, the activities must be ‘appropriately grounded in the prevailing discursive context’ (Hardy *et al.* 2000, p. 1245) and a smooth introduction of a new discourse should therefore involve ‘connecting them to stakeholders’ routines and values’ (Maguire *et al.* 2004, p. 657). To achieve this, Arana management located their discursive activities in a context that was meaningful to the service providers but also served the interests and goals of management (Mumby & Clair 1997). This was done by management utilising the notion of service to act as a bridge between the more emotional legacy of charity and the professionalism of the new discourse.

Continuation of emphasis on service has to a large extent enabled numerous service providers in the legacy discourse to accept their new subject positions in the new discourse. Not all actors are equally skilled in introducing planned outcomes nor may they have the legitimated subject position, either formal or informal. But, in the case of Arana’s senior management, they were able to successfully introduce a discursive change by ensuring that the ‘routine’ of service provision continued and also that the ‘values’ of service recipient client focus were maintained. This services ethos is the stabilising / translatable dimension that successfully facilitated the shift from the legacy charity discourse to the new discourses. Whilst a strong services ethos has been maintained, typically the traditional charity discourse service delivery lacked ‘co-creation of value’ which is a key feature of a services dominant logic to marketing (Lusch & Vargo 2006; Vargo & Lusch 2004a). Co-creation of value involves active involvement of both the client and the service provider in provision of the service. Co-

creation of value only occurs within some of Arana's service delivery. For example, provision of work opportunities within the for-profit division of Arana provides value for both Arana and the dual service recipient client/employee, whereas provision of care facilities results in creation of value by Arana only for the service recipient client with no input from the service recipient client.

Organisations can be regarded as 'sites of struggle where different groups compete to shape the reality of organizations in ways that serve their own interests' (Mumby & Clair 1997, p. 182). The 'technologization of discourse' is defined by Fairclough (1995b, p. 3) as 'calculated intervention to shift discursive practices as part of engineering of social change' and is regarded as involving three stages - research into the current discursive practices, redesign of those practices in relation to specific objectives (by managers) and training of employees in the redesigned practices. Management within Arana analysed the existing discourse within the organisation and deemed change was required in order to survive in the increasingly competitive environment and to position the organisation for ongoing sustainability. Management subsequently introduced actions to instigate new practices (led via creation of committees) and utilised various formal training to instil the new discourse.

The participant positions and roles were a key issue in legitimising power with positioning being 'an important concept in considerations of the way in which people are both producers of and produced by discourse' (Wood & Kroger 2000, p. 101). Power within an organisation is exercised 'through the discourse of its members' (Mumby & Clair 1997, p. 183) and the transformation within Arana has been successfully conducted by senior management, led by the CEO - 'actors who hold subject positions that warrant sufficient voice, as recognized by others' (Hardy *et al.* 2000, p. 1245) and regarded as legitimate (Habermas 1979) influencers to instil

‘dominant meanings in place’ (Hardy & Phillips 2004, p. 307). Thus, the discursive activities conducted by Arana management in recent years and introduced via numerous committees have created a new object - from a traditional charity organisation to a more businesslike organisation adopting a new managerialism focus and market orientation under-pinned by social entrepreneurship (including creation of a for-profit division) for revenue generation.

Whilst discourses are in ongoing dispute (Clegg *et al.* 2006) and can change, be contested, resisted or transformed by various discourse actors (Hardy *et al.* 2000; Hardy & Phillips 1999), the Arana employees, overall, accepted the new discourse and perceive the benefits of the new discourse to be the increased amount of service provision that has become available for their service recipient clients from the increased revenue. It appears that those who resisted the discursive change within Arana either left the organisation or were eventually ‘sold’ on the new discourse, whilst other existing employees accepted the new discourse immediately, and new staff were only employed if they were perceived as being in tune with a marketing discourse.

As mentioned previously, Mair and Marti (2006, p. 37) define social entrepreneurship as ‘a process involving the innovative use and combination of resources to pursue opportunities to catalyze change and/or address social needs’. Arana have utilised such a process to establish strong revenue streams - both via establishment of a for-profit division (which also provides employment for service recipient clients affected by the medical condition), and via development of the organisational skills required to develop relationships and linkages with government to enable ongoing winning of grants. Thus, relationship marketing was a key new activity introduced into Arana. There is now minimal reliance on donations, the traditional revenue source of charities. The entrepreneurial activities provided Arana with access to revenue to enable

the delivery of increased services to Arana's service recipient client base. Coupled with new managerialism, crucial to the effectiveness of this operational model is an overarching marketing discourse which enables improved knowledge and understanding of Arana's wide range of 'clients' – from government fund providers, to paying clients, to service recipient clients affected with the medical condition.

This analysis of the Arana discourse transformation has been based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations. It is considered that there were two phases through which the transformation progressed, leading to the current market/societal discourse. These phases were a new managerialism phase followed by a professionalism phase. Table 5.3 overleaf thus contains a summary of the discourse component changes within Arana as it progressed through the phases of the discourse transformation. As can be seen from the Table, various aspects of discourse transformation occurred within each of the transformation phases. The key displacement of discourse boundaries related to introduction of a social entrepreneurialism, thus widening the boundaries of the existing discourse and opening up a wider range of scope for Arana. This change in boundaries was progressively embedded within Arana over time as the organisation moved through the initial new managerialism phase into the professionalism phase until the ultimate charity hybrid was established.

Employees within the new discourse were required to adopt new subject positions and roles framed around more businesslike and professional behaviour with more rigid operating procedures and reporting requirements. Tension developed amongst these employees during the new managerialism phase of the discourse transformation as they realised they would be required to adopt new subject positions.

Table 5.3 – Summary of Arana Discourse Component Changes

	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
Displacement of Discourse Boundaries	<ul style="list-style-type: none"> • Introduction of social entrepreneurialism including introduction of new fund-raising activities (for-profit division) and targeting government grants • Introduction of expanded service activities • However, maintenance of client first approach 	<ul style="list-style-type: none"> • Progressive development of social entrepreneurialism • Progressive development of expanded service activities • Underlying continuance of client first approach • Development of professional tender writing for government tenders 	<ul style="list-style-type: none"> • Established social entrepreneurialism • Established expanded service activities • Underlying continuance of client first approach
The New Position & Role of the Speaking Subject	<ul style="list-style-type: none"> • Commencement of some tension due to initiation of change in overall organisation direction • Commencement of some tension due to initiation of change in service delivery • However, a general overall acceptance of the need to change to meet the changing environment 	<ul style="list-style-type: none"> • More formal and professional roles and required daily activities • Increased emphasis on more formal and structured service provision • Assisted by improved information gathering • Introduction of some practices from for-profits • Increased use of KPI's & reporting • New organisational identity, assisted by new offices and introduction of employee uniforms • Perception of change from 'charity' to a 'support agency' • Tension due to continued change – mainly in service provision areas • Mixed acceptance of new marketing techniques • Greater interfunctional co-ordination 	<ul style="list-style-type: none"> • Relationship marketing to assist government tenders • Rigid reporting required to meet government audits • Embedding of new service delivery processes • Embedding of the four key dimensions of market orientation

continued overleaf

Table 5.3 (continued) – Summary of Arana Discourse Component Changes

	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
The New Position & Role of the Speaking Subject		<ul style="list-style-type: none"> • Training to assist change in roles • Increased competitiveness against other charities for government funds • Minor employee resignations, replaced by new employees more comfortable with the new roles being introduced. 	
The New Mode of Functioning of Language	<ul style="list-style-type: none"> • Introduction of business terms 	<ul style="list-style-type: none"> • New business terms become more common and familiar amongst employees 	<ul style="list-style-type: none"> • New business language now normal
Circulation of Discourse	<ul style="list-style-type: none"> • Long-term CEO introduced more formal management structure introduced • Introduction of new discourse very gradual and relatively subtle 	<ul style="list-style-type: none"> • Formation of committees to assist employee buy-in 	<ul style="list-style-type: none"> • Established, however ongoing resource issues of service provision versus marketing

Those who could not come to grips with the new required roles departed. A new language based on the language of business was introduced within the new managerialism phase and progressively embedded. Circulation of the new discourse was introduced relatively slowly and in a low-key manner by the long-serving CEO with committees formed during the professionalism phase to assist employee buy-in of the new discourse.

In summary, this case study has shown how the linkage of ‘specific discursive acts and the consequential practices’ (Hardy *et al.* 2000, p. 1244) have enabled Arana management to affect a successful discourse transformation which is characterised as an interdiscursive hybrid of new managerialism (a more businesslike perspective) and marketing (utilising all four components of market orientation) with a focus on social entrepreneurialism for revenue generation and a strong emphasis on service recipient client service delivery. This is illustrated in Figure 5.2 below.

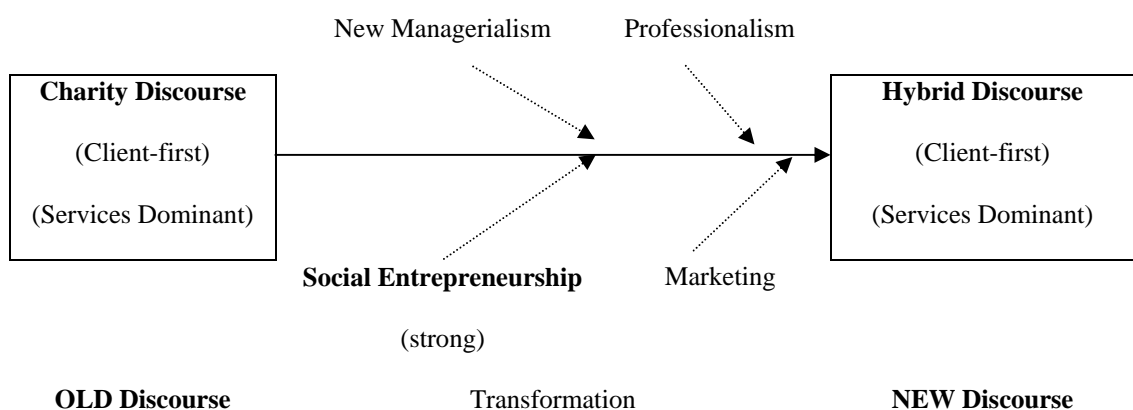


Figure 5.2 – *Discourse Transformation Within Arana.*

CHAPTER SIX : CASE STUDY TWO – Bukari

A Direct Marketing Model

6.1 Chapter Outline

The discourse transformation in Bukari, the second case study organisation, is discussed and analysed. The chapter focuses on the rapid shift from a traditional charity discourse to a new, marketing discourse characterised by direct marketing for revenue generation. Similarly to the previous chapter, an overview of the case organisation is offered, followed by an assessment of the discourse transformation based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations which are – firstly, displacement of discourse boundaries; secondly, the new position and role of the speaking subject; thirdly, the new mode of functioning of language; and lastly, circulation of the discourse. The chapter concludes with a summary of the case findings.

An outline of the chapter is contained in Figure 6.1 below.

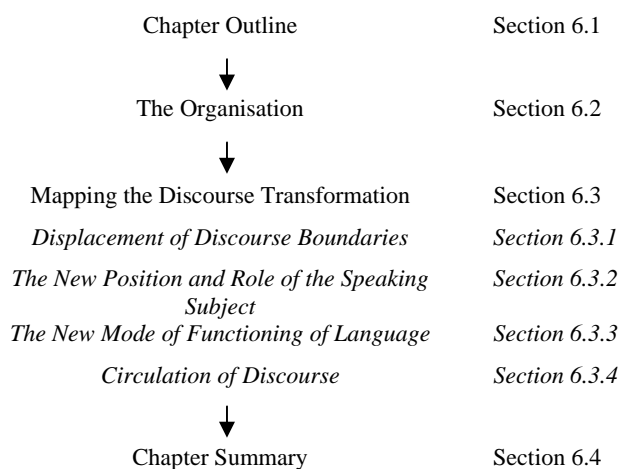


Figure 6.1 - Outline of Chapter 6.

6.2 The Organisation : Bukari

Originating in 1952 as a charity run by parents and interested persons, Bukari began employing professionals in 1968 and is now a national charity organisation employing over 100 full-time, part-time and casual staff as well as forty volunteers (Bukari n.d.-a). Bukari's aim is to provide education and support services throughout Australia to children and adults with a specific medical condition. To maintain anonymity, the specific medical condition has not been mentioned. Bukari's secondary aim is to raise awareness within the community of the medical condition as well as advocacy/lobbying to government on behalf of Bukari's service recipient clients.

The national office in Sydney (90 employees) plus regional offices managed by 12 employees in three States and Territories enables Australia-wide coverage either in person or via phone, fax and the internet. Based on five decades of services to the community, the organisation utilises highly qualified registered nurses and educators. The top three staff are the Chief Executive Officer, Business Development Manager and Funding Development Manager. Services include individual service programs (aimed at individuals and their families), community and professional programs (for schools, police, nurses and other community groups), as well as information and referral services (Bukari n.d.-b). Bukari mainly relies upon self-generated funds to operate, and typically raises funds via donations, lotteries and bequests. Minimal assistance is provided by government (less than 3% of total revenue). An outbound call centre is operated to contact potential donor clients and lottery ticket purchasers.

In 2005 the CEO resigned and several members of the senior management team also left. Since then, significant changes towards a business oriented perspective involving numerous aspects of a marketing discourse have occurred within Bukari.

These changes were deemed as needed urgently due to the poor financial situation of Bukari. The financial situation was a key influencer in the manner in which the CEO introduced the discourse transformation. The new CEO, with assistance from a hand-selected new senior management team made changes towards ‘creating a corporate structure that provides the foundation for service growth ’ (Bukari 2006, p. 2) and initiated a strategic planning process including a new vision, new framework and business plan. The aim for the next three years was to develop quality products and ‘provide services that meet or exceed the changing expectations of our [service recipient] clients ’ and ‘establishing a process to survey the people we support’ (Bukari 2006, p. 3), build organisation capability, introduce ‘new policies and procedures’ (Bukari 2006, p. 3) and diversify the income streams as well as increase Bukari’s profile via new marketing collateral and a communications plan to raise awareness. By 2006, Bukari had commenced ‘brand development ... expansion in services and fund-raising’ and ‘began gathering information direct from consumers’ (Bukari 2007, p. 4). Also, to ‘raise community awareness’, a new logo was developed as well as a ‘range of new resources including service brochures and publicity materials’ and a ‘strong direct marketing capability’ (Bukari 2007, p. 8) enabled growth in revenue, particularly from lottery net sales (Bukari 2009). The current strategy incorporates ‘design of innovative services and delivery tools’ (Bukari 2008, p. 4) and a ‘commitment to quality services’ (Bukari 2008, p. 5).

Success of Bukari’s new marketing strategy has enabled a 40% increase in revenue over the past four years as indicated in Table 6.1 overleaf.

Table 6.1 – Bukari Revenue for Most Recent 4 Years (Bukari 2006, 2007, 2008, 2009)

REVENUE	2004/05	2005/06	2006/07	2007/08	2008/09
Total Income	\$ 3.5 million	\$ 3.6 million	\$ 4.2 million	\$ 4.4 million	\$ 4.9 million
Cum. % increase since 2004/05		3%	20%	26%	40%

The service and market oriented aspect of Bukari is emphasised in its mission statement to deliver ‘innovative, high quality education and support services’ and success for the organisation requires it ‘to listen and respond, constantly challenging ourselves to improve and innovate’ (Bukari n.d.-c).

Within the grounds of research confidentiality, a profile of the employees interviewed for this research is contained in Table 6.2 overleaf. It should be noted that only current employees were interviewed. Former employees were not interviewed within this research. All interviews were voluntary. Whilst it is not known if any employees invited to be interviewed chose not to be interviewed, it is possible that the views of any such employees may have differed from the views of those interviewed and may thus not have been captured in this research.

As detailed in Section 4.3.4.4 above, theoretical sampling was utilised. As noted from Table 6.2, there was a relatively predominance of females interviewed. Indeed, the only males interviewed both worked in the fundraising section. Significantly, the majority of respondents had less than 5 years of service with Bukari, due partly to the CEO having brought in some ‘hand-picked’ senior employees to assist with the discourse change as well as the resignations of some existing employees who did not like the new discourse. No respondents had more that ten years of employment with Bukari.

Table 6.2 – Profile of Bukari Respondents

Respondent Code	Function	Gender	Age	Years with Bukari
BA	Admin – provider	F	<30	3
BB	Service delivery - Manager	F	>40	3
BC	Admin – Manager	F	30-40	7
BD	Senior Manager – Fundraising	M	30-40	3
BE	Service provider & team leader	F	>40	2.5
BF	Service provider	F	30-40	2.5
BG	Senior Manager – Admin	F	>40	3
BH	Fundraising - Supervisor	M	30-40	3
BI	CEO	F	>40	3
BJ	Service delivery - provider	F	30-40	2
		Count Male = 2 = 20% Female = 8 = 80%	Count 30 = 1 = 10% 30-40 = 5 = 50% >40 = 4 = 40%	Count <5 = 9 = 90% 5-10 = 1 = 10% >10 = 0 = 0%

6.3 Mapping The Discourse Transformation

6.3.1 Displacement of Discourse Boundaries

This section commences with examination of what respondents regarded as a traditional charity discourse. The shifting boundaries of the discourse to develop a new competitive strategy are identified, indicating a discourse transformation based upon market orientation via a services marketing and direct marketing model. Specific aspects of the new discourse are then discussed, namely identification of the existence

of the four key dimensions of market orientation and interdiscursive tension as well as the finding that respondents had mixed views regarding marketing.

6.3.1.1 Traditional charity discourse

Prior to discussing the current discourse operating within Bukari, respondents' views regarding a traditional charity discourse were obtained. This enabled a 'base line' to establish respondents' interpretation of charity discourse. Characteristics of a traditional charity discourse were regarded by respondents to typically entail small-scale activity with low-level fund-raising, a reliance on volunteers, and operating in an inefficient and unsophisticated manner. The traditional charities were regarded as being reactive, having a welfare based feel, being hierarchical with little customer focus and *'very sort of the caring, feeling, sharing based as opposed to a business orientation'* (BG51).

Fund-raising within a traditional charity was regarded as low-scale and unsophisticated, namely *'knocking on doors, out in the streets with your buckets'* (BA36) and *'little cake stalls on streets, not big events happening and very ... grateful just for that \$5 donation'* (BB60). Targeting of corporates for funds was not utilised, and the traditional charities were perceived as having little or no professional fund-raising employees.

6.3.1.2 Shifting boundaries : a competitive strategy

Small traditional charities were perceived as capable of surviving in niche areas if they maintained their key supporters - *'they will be able to survive, but they are not going to thrive'* (BD95). It was generally accepted, however, that if charities want to

grow and expand they need to change to meet the current environment and should *'at least get with the times ... developing your e-Marketing a bit, your website and that sort of stuff'* (BA64). As indicated by the CEO - *'I am darn sure they need to change, I think it has actually come down now to a question of survival'* (BI112). The need to change was considered particularly relevant due to the increased demands from potential fund providers such as governments for greater accountability by charities. This has been exacerbated even more by philanthropists *'expecting exactly the same thing, show us the costs, show us the need, show us the value, show us the outputs'* (BI127). Even the *'general public out there are more savvy these days, they are aware, they want to know what you are doing with the money'* (BB86).

Respondents typically considered that marketing methods from the for-profit sector could be utilised by charities to assist change to meet the current environment in which charities need to operate. However, funds were regarded as an issue, with a preference for spending money on increased services - *'I think everything always comes back to the money'* (BB426). Marketing was not necessarily regarded as expensive, but the key issue was simply funds. A key advocate for use of marketing as utilised by the for-profit sector was the fund-raising manager who indicated that *'the charities that do particularly well in fund-raising are the ones that have taken commercial models and adopted them, adapted them to their need'* (BD676). Adaptation was required due to the subtle differences between for-profit, and not-for-profit organisations (as discussed in Section 3.6.1). Likewise, the CEO indicated that the marketing practices utilised by many successful charities *'come from the profit world and have made absolute sense in the non-profit environment'* (BI517).

6.3.1.3 Discourse transformation : Market Orientation via a Services Marketing and Direct Marketing Model.

A key issue in this thesis is how a charity and its employees change and adjust when a marketing discourse is introduced. Following-on from the previous sections that indicated general acceptance that traditional charities need to change in some way to meet modern requirements and demands from society, it is apparent that Bukari has recently introduced a new discourse styled upon a market orientation as is discussed in the following paragraphs.

A typical comment regarding the previous management of Bukari was that *'there was no formal structure ... the CEO and board had opened offices in an ad hoc way around the country without any real service plan looking at the need as far as population and demand for services. It was just, if, one of our staff members happened to be moving there'* (BC145). A key problem for Bukari was that the existing discourse was not relevant to the current environment and that Bukari was also operating in deficit - *'I think this place was definitely stuck back, when I walked in here I thought I had gone back 20 years, I seriously did'* (BB137).

In 2005, the new management of Bukari commenced introduction of a new discourse. The move to a marketing discourse was generally regarded by employees as positive with a typical comment being - *'I think we needed to move on a bit, I think that this place probably was a little bit of an old style charity and it just needed to get with the times'* (BA92). Due to the poor financial situation, Bukari literally needed to change, and quickly, simply to survive, with 'efficiency' in both costs and service delivery being perceived as the key benefit of the changes as evidenced by the comment from a middle manager that *'I think the changes are ones that have had to be made, it is not really a*

discretionary thing, the changes had to happen if we were to keep functioning. So I think for the organisation those changes have all been positive' (BE137). The discourse transformation was 'sold' to the employees on the basis that change was essential in order for Bukari to survive given the deteriorating financial position.

6.3.1.4 Existence of the four key dimensions of market orientation

Lafferty and Hult (2001) suggest there are four key dimensions of a market orientation - emphasis on customer, importance of information, interfunctional coordination and taking action. There is evidence that all four of these key dimensions (to varying extents) now exist within the new Bukari discourse.

The first key dimension of a market orientation is 'emphasis on customer' (Lafferty & Hult 2001). In a charity context, 'customer' refers to both service recipient clients as well as donor clients. There is now a strong emphasis within Bukari on both service recipient client and donor client needs, which is a change in practice from the previous discourse. Information regarding both service recipient clients and donor clients is now gained via surveys and utilised to develop appropriate services for service recipient clients and customised offerings for donor clients. Overall, respondents regarded both service recipient clients and donor clients as being of relatively equal importance, and essential for Bukari. In regards to service recipient clients, typical comments were - *'we are not here without them'* (BB349) and *'that is why we are here'* (BE269). Likewise, donor clients were regarded as *'just as vital ... even probably more so, you just don't survive'* without them and *'our database is our gold mine, it is precious, it's ours, and we really have to look after it and we do, you don't share it with anyone'* (BB353). As indicated by the CEO - *'I don't think you can even say [donor*

clients] *are a close second* [to service recipient clients], *I think you have to say* [donor clients] *are equally as important, and the reason being, there is no service* [for service recipient clients] *without the donors'* (BI433). Further evidence of Bukari's emphasis on the customer is the Bukari website which now includes a 'service policy' page (Bukari n.d.-d) with a 'complaints' procedure enabling service recipient clients and donor clients to clearly identify the service level expected, and also how to complain if the perceived service is not up to standard. Use of service guarantee policies is a key component of good services marketing practice.

The second key dimension of a market orientation is 'importance of information' (Lafferty & Hult 2001). Gathering, analysing and disseminating information (importance of information) are basic components of a market-oriented organisation. In terms of information gathering, Bukari previously '*wasn't geared up to even capture the data that it required*' (BI150) and thus steps were taken to improve data gathering. The new CEO still recognises that information is not utilised as well as possible, mainly due to a lack of resources.

In regards to information needs, there are basically three areas – fund-raising (from donor clients), service recipient clients and the environment. In the fund-raising section of Bukari there is now a strong gathering and use of information regarding potential and current donor clients and lottery buyers. Bukari's customer relationship management database is segmented into cold calling and different tiers of existing donor clients and lottery buyers based on levels and frequency of donation. Weekly sales data are analysed as well as operator performances. Contact details of potential new donorclients are gained by purchase of mailing lists. Donor clients are segmented to enable customised contacts (written and verbal) - '*we do apply marketing segmentation [and] targeting principles to it and our database allows us to do that because it is rich*

in transactional information, particularly donors' (BD504). Following completion of a campaign, post campaign analysis has been introduced. As indicated by the senior manager in charge of fund-raising - *'there is a history now of three years analysis for every lottery that has been conducted, every direct mail campaign that's been conducted. That is something that wasn't here before, so I don't know how the [old] campaigns performed, I might find the odd spreadsheet here and there with a weird name and you open it up and it might give you the results of a campaign that was done in 2003, but there is no real structure around it'* (BD665).

In regards to service recipient client information, a client database is in the process of being developed, with Bukari *'moving away from paper based stuff but its still got teething problems, it is not perfect'* (BD508). A representative 'service advisory group' comprising a group of service recipient clients was established to assess the needs of affected people and provide *'a broad perspective on the things that we ask them to comment on'* (BC384). In terms of client surveys, as indicated by the CEO, Bukari *'have gone from nothing ... to now regularly evaluating all education programs, every month surveying our [service recipient] clients on timeliness, satisfaction and various other things'* (BI503). There is also an exit survey *'so once a file is closed they [are] asked how they would evaluate the service'* (BA261). Service quality is measured via monthly surveys of service recipient clients who made contact during the month, and surveys are conducted following delivery of various services such as education programs and camps. The information gathered regarding service delivery is proactively utilised to modify services where required - *'where are the gaps within the services available to them ... getting that sort of feedback and then planning services around that'* (BF241). However, despite improved gathering of service recipient client

information, there is recognition by a senior manager that the data is *'not measured very well in terms of really analytical tools'* (BG196).

The external environment including competitors is monitored in various ways. Numerous staff are on the mailing list of other charities to enable competitor monitoring - *'I have got my name on mailing lists, so I am receiving other charities mail all the time'* (BB318) because *'you do get some good ideas from what other people are doing. A lot of that is very prevalent in the charity industry, that they copy each other'* (BD533). Other sources of information include the internet, newsletters and media alerts.

The third key dimension of a market orientation is 'interfunctional coordination' (Lafferty & Hult 2001). Prior to introduction of the new discourse, Bukari was somewhat departmentalised - *'it had the typical silo's ... there was collaboration but it wasn't smooth'* (BI441). Communication and dissemination of information were regarded as poor - *'we did a staff survey in 2006 and out of there was, in glowing lights, that there was no internal communications'* (BA127). It is regarded by respondents that Bukari now has improved sharing of information and better communication with the newly introduced intranet perceived as a highly effective way to share information not only within the head office, but with remote service providers in other parts of Australia. Whilst there has been improvement in interfunctional coordination, it is still not considered by staff as perfect. Following introduction of the new discourse, communication is regarded as good, with employees working *'hand in hand'* (BH441). The intranet and regular meetings now aid communication both within and across departments. There is also a quarterly general staff 'action-tracking meeting' and there are also *'executive meetings with all the heads every fortnight'* (BD570). Technology has been introduced to enable greater communication across Australia, with use of

video conferencing for staff based outside head office. The general consensus now regarding communication amongst employees in the new discourse is that *'there is a lot of communication now. There wasn't before. There have been a lot of big changes'* (BG265).

Whilst numerous data is gathered and disseminated throughout Bukari, ultimate decision-making was regarded by respondents as being centralised, albeit with staff feeling they have the opportunity to provide input - *'if you feel strongly enough about something, you are listened to here, which is pretty good'* (BB375). As indicated by the CEO, the centralising of decision-making has *'been a bit of a deliberate thing to try and bring about change in the organisation and consistency'* (BI486). Thus, the CEO has consciously decided to centralise control to ensure an appropriate rollout of the new discourse.

The fourth key dimension of a market orientation is 'taking action' (Lafferty & Hult 2001). Bukari's approach to taking action and delivering services to both service recipient clients and donor clients has changed significantly since introduction of the new discourse - *'the service itself was almost sort of dismantled'* (BE144) and rebuilt in an appropriate manner. As indicated by two service providers, *'we never used to capture people's details, so we had no idea who we were delivering services to but that's all changed'* (BJ446) and *'when we first came here we had no [service recipient] client files, no history, no nothing, no statistics. So we implemented all those things, we've got service models designed and developed now and they're all up on the intranet. There's consistency across Australia'* (BA448). Basic aspects such as standard practices and procedures have been written and implemented and, overall, the service delivery is now regarded as more professional with more qualified service providers and *'everything is being documented, it is accountable, and it's professional'*

(BB405). The educators are typically qualified teachers, and the medical service providers are now registered nurses.

The new service delivery could be summed up by the comment that - '*we have actually put [in place] formal processes in documenting the needs assessment, individual service plans and measuring outcomes and being able to articulate what services we deliver, how we deliver them, in what time frame and what the expected outcomes are, and then doing ... surveys completely separate from the service department, to measure effectiveness and [service recipient] client satisfaction*' (BC198). Use of technology to aid service delivery has been introduced with greater use of the internet, video conference and tele-conferencing. More efficient use of service provider travel time via better planning of road trips has also been utilised. Not only has service delivery improved, but service quality is now also measured - '*[service recipient] client satisfaction surveys we've implemented [have] sort of happened over the past two years. So in terms of that data it's only new data and we have nothing honestly to compare it to before*' (BA461).

Service delivery in the fund-raising section has also changed, with an increase in the number of appeals annually, determination of donor clients preferred contact methods, as well as greater customisation of the contact letters. Thus, there has been a distinct change in the daily practices within all aspects of Bukari's operations, from service delivery to donor clients, to fund-raising practices. These changes have been brought about by introduction of the new discourse that contains all four key dimensions of market orientation. Despite the improved service delivery within the fund-raising section, no use is made of blueprinting which can potentially assist in improving the donor client service process (Polonsky & Garma 2006; Polonsky & Sargeant 2007).

6.3.1.5 Interdiscursive tension

The CEO introduced the new discourse very quickly, basically out of necessity for the survival of the organisation. This rapid introduction resulted in a lot of change - *'there was heaps of change going on, heaps'* (BF391). As indicated by the CEO, instituting the new discourse was:

tough, tough, tough. We had high staff turnover, we had some people, and they were the minority, who saw the absolute sense of it and almost did the aaaaah, about time, about time that somebody started to do something about this, and we had the people who just wouldn't move, and there was a range, from couldn't see the sense, couldn't understand, through to downright resistance. So it has been really hard, really, really hard getting that change. (BI189)

The issue of change can be viewed by employees from differing perspectives. One is a very personal perspective regarding 'how does it affect me' whilst the second is a more organisational perspective of 'how will it affect the organisation'. Thus, even though some employees may see the benefit of change for the organisation overall, they may still be sceptical and apprehensive about how the change may directly affect their own personal position. The discourse change received a mixed reaction amongst employees. Some people *'had a real culture shock, there were a few resignations [but also] the ones that are still here are just so impressed with what has happened and the changes that have happened ... those people who are still here are really appreciative of the fact that we can see the [service recipient] clients are benefiting from what's happened'* (BB149).

The new discourse affected all aspects of the organisation. In the service delivery area, *'for the service providers it was pretty unsettling, over that time, some service providers stayed and some left. It has meant them moving to a new ... mindset as well, because I think often with the old style of not-for-profit, there is an all care but no*

responsibility' (BE105). Similarly, in the fund-raising section some existing employees queried the new changes. For example, as indicated by a manager in the fund-raising section *'there was an uproar [from older staff] when we suggested that we wanted to mail the lottery buyers donation requests, and [service recipient] clients, we were going to actually ask the [service recipient] clients for a donation! I thought we were going to be lynched ... we did [ask for donations] and we got a really good response and it sort of turned [the older staff] around'* (BB162). The older employees were set in their ways and entrenched in their traditional manner of interacting with lottery ticket purchasers. The newer employees with either new or less entrenched views were not locked into the old discourse and perceived donor clients in differing subject positions to the older employees.

The increased level of accountability caused issues for numerous employees. As indicated by a senior manager - *'anything around accountability is going to be difficult for some staff and it has been here and that has been probably the major trigger for people moving on, having to be accountable'* (BG135). Likewise, the increased level of documentation and records keeping raised issues, particularly with service providers who were *'complaining about the amount of paper work and documentation that they had to do, because they actually weren't used to doing it ... they would actually refuse to do it or do it very badly'* (BC214). The rapid introduction of the new discourse resulted in some problems due to some new processes being put in place but then withdrawn and changed again - *'they put in a type of method to do that, and, oh, that's not really working so withdraw that and then put [in] something else'* (BF401). Similarly *'you had movement within staff, within the team ... it was very difficult because everything would just keep changing'* (BE146).

The new management took a determined stance and steadfastly introduced the new discourse mindful that some existing employees would dislike the changes. This stance was regarded as a necessity for Bukari to survive in what was regarded by the CEO as '*a very competitive market*' (BI122). As indicated by a senior manager brought into Bukari to assist the new CEO with the discursive change:

the organisation had a lot of staff that probably weren't suitable for the roles they were in ... however, being a not-for-profit organisation, and it is not a commercial enterprise, it is a lot harder to, I guess, move people along, you know, performance manage people, it is a tougher environment to do that in, there is a bit more compassion than in a commercial organisation, but eventually most of them didn't feel that they fitted in with the new culture and eventually found other jobs. (BD129)

Likewise, another senior manager commented that '*there has been staff turnover. Others have moved forward and have really engaged with the change*' (BG110).

Getting used to the new discourse created issues even for the employees who stayed and were in favour of the changes. As indicated by a middle manager - '*It was a very challenging time, I am the last remaining manager from the original group. At the point when we got a new CEO, they came from a services marketing perspective, I come from an acute care nursing perspective, I had never been exposed to that before, so it is a completely new concept and the language, it was like a foreign language*' (BC164). This employee recognised that new concepts and language have been introduced into Bukari, clear evidence of a discursive shift.

Overall, during the introduction of the marketing discourse into Bukari, there were varying levels of uneasiness amongst staff. Whilst some staff left, other longer-serving staff who '*were a little bit apprehensive*' (BJ117) tended to ultimately embrace the change. It is significant that the new CEO who was brought into Bukari to introduce the new discourse also brought along colleagues from a previous employer to occupy

senior positions to assist in the introduction of the new discourse rather than attempt to use the existing senior managers. When a new discourse is being introduced, the technologists in charge of introducing the new discourse need to be aware of potential resistance from existing employees at all levels. By installing new senior managers sympathetic to the planned new discourse, the CEO thus reduced the potential for resistance at a senior management level. Also, the more people already familiar with the planned new discourse, the easier it is to introduce. These senior managers possessed subject positions of formalised legitimated power in the Bukari management structure to assist the CEO to implement the change. Bringing in new employees familiar with the planned new discourse made the job of introducing the new discourse easier.

Overall, the changes introduced were regarded as needed and positive, with a service provider commenting that *'I don't know any [changes] that I don't like!'* (BA139) and *'I think we needed [the change]. It's probably impacted on my job description a lot but I think the organisation needed the changes'* (BA231).

6.3.1.6 Mixed understanding of marketing

Whilst a market orientation has been introduced into Bukari, respondents had a range of understandings regarding exactly what 'marketing' is. This was to a large extent dependent upon their job roles within Bukari - *'I guess it depends on who you are talking to. Probably the service providers don't understand what we mean by marketing. The telemarketers would think that what they do is marketing. Whereas then you'd have other people like in communications who know what marketing is'* (BA192). Marketing was typically seen by many respondents as promotion and branding, with a

senior manager suggesting that *‘a lot of not-for-profits probably don't use the word marketing, they call it fund-raising department’* (BD304).

It was recognised by the CEO that staff had mixed understandings and knowledge regarding marketing - *‘it varies a great deal and at one end I think people still don't even really know what marketing is, and they might think it is promotion ... at the other end I think I have got a few people who work quite closely with me that are quite savvy [regarding marketing]’* (BI264). This mixed understanding of marketing needs to be taken into consideration when seeking the views of respondents regarding the use of ‘marketing’ by Bukari. Indeed, given that Bukari has adopted a market orientation, numerous respondents within Bukari are actually doing various ‘marketing’ activities as part of their everyday jobs, without even knowing it.

Whilst staff were initially apprehensive about use of marketing, most staff now have a positive view towards use of marketing by Bukari as evidenced by the comments that *‘if you had asked me three years ago, I would have looked at you as if “what are you talking about?” because I didn’t see that there was a role of marketing in [service recipient] client interaction ... and we weren’t into that, it just didn’t come up, it just wasn’t in the thinking of the organisation previously’* (BC253) and that *‘I think they have come around to it [and] I think an organisation really can't survive without it’* (BB242). The now positive view is based on education of the staff by the CEO and explaining the aim of the marketing activities.

6.3.2 The New Position and Role of the Speaking Subject

People typically behave and act differently in a new discourse compared to within a previous discourse. Elements identified and discussed within this section are

the increased level of professionalism required throughout the organisation, the major shift in direct marketing, the new organisational identity, linkages with the legacy discourse, wrestling with service versus marketing priorities and the differing subject positions taken by employees regarding competition.

6.3.2.1 *Towards professionalism*

The transformational process ‘brings into play a new set of values ... new subjectivities’ and the ‘role and sense of identity and purpose’ of employees is typically ‘reworked and redefined’ (Gewirtz & Ball 2000, p. 266). This has certainly been the case within Bukari. The key differences between the ‘old’ and the ‘new’ discourse within Bukari were perceived by respondents to be increased professionalism, accountability, policy, structure and a greater revenue focus - with greater communication with stakeholders. Standard practices and procedures have grown from nil to over sixty. A typical comment being that the *‘differences would have to be professionalism, the services that we are providing to [service recipient] clients now, our accountability on record keeping, documentation. Just the whole thing, it has all come together now’* (BB203). Likewise, a senior manager considered the key changes to be *‘strategic planning ... documenting plans, identifying projects ... developing a budget to enable that to happen. So their business model has improved, definitely’* (BG99). Very business-oriented job titles are utilised, with a strong evidence of a ‘managerialism’ focus - Services Marketing Manager, Business Development Manager and Funding Development Manager. These job titles indicate a shift in subject position to reflect the nature of the new discourse.

Existing products were reviewed, streamlined and modernised, resulting in introduction of new service delivery methods. Standard practices and procedures (previously non-existent) were introduced, and new employees with professional qualifications (registered nurses and teachers) were employed. New products were introduced including education and training sessions with these being a fee for service product. The newly introduced education and training sessions for organisations have been highly successful and have *'taken off ... [we] have got a waiting list of about eight weeks'* (BB113). To increase awareness amongst a younger target audience, establishment of a 'Facebook' presence on the internet was introduced.

To ensure sustainability, and ultimately turn Bukari from a negative to a positive cash-flow organisation, staff numbers were initially reduced due to tight budget restrictions and in some cases this resulted in delays *'to offer the service'* (BJ161). Typical business key performance indicators (KPI's) were introduced for service delivery - *'getting to [service recipient] clients within a certain amount of time, delivering services within a certain amount of time, having documentation and files and reports in within a certain amount of time and ensuring that they have covered everything as far as your reporting goes'* (BF156). Not only has the service delivery been streamlined and made more businesslike, but the fund-raising area was also streamlined. The cost of fund-raising has moved from being *'pretty bad, it was like 70c to the dollar'* to now *'approaching 40c'* (BD360). The price of lottery tickets was also increased from \$2 to \$5 per ticket.

There was a perception that the previous discourse within Bukari was more based on the individual needs of the existing employees and that little service recipient client nor donor client focus existed. Whilst the organisation has now become very cost

focussed to ensure survival, it has also become more service recipient client and donor client focussed. As indicated by a senior manager, Bukari has:

moved from a mothering, nurturing sort of an organisation to a much more consumer focussed organisation, so we are much more consumer centred, and everything is driven by the needs of our consumer base ... we are much more client focussed as opposed to being organisationally focussed, you know, about ourselves, yes, ... there has been a real shift for the organisation to being very externally focussed, as opposed to internal. (BG143)

Use of such language by this senior manager, namely words such as ‘consumer focussed’, ‘consumer centred’ and ‘consumer base’ are typical of the language of marketing discourse. Thus, a hard-edged business perspective (characteristic of new managerialism) and revamping of operations both in service delivery and fund-raising was taken to assist long-term viability of the organisation. As commented by a middle manager - *‘one of the first things the CEO [did was that they] recruited professional service providers and made a point of prioritising client services. Obviously we had to have the money to do that, so fund raising has been there as well. So [the CEO] looked at that and made sure that on the fund raising side that we had, you know, our DM [direct marketing] was there, like we knew what we were doing’ (HL139)*. As summed up by the CEO, performance of Bukari is measured based on *‘looking at efficiencies’ (BI302)*. Thus, the new discourse within Bukari is characterised by a strong cost focus and a change of practices. The increased professionalism and practice changes have resulted in changed subject positions for existing employees with new requirements, responsibilities and ways of operating.

6.3.2.2 Professionalising direct marketing

Successful and ongoing revenue raising is a key component of a viable charity. The majority of Bukari's revenue has traditionally come from lotteries and donations (albeit in an inefficient manner) - *'telemarketing ... it's bread and butter for the company'* (BH95). It was perceived by the new management that this base could be further developed via a strong direct marketing strategy based on traditional for-profit marketing principles in keeping with management's cost focus and streamlining of operations. A predictive telephone dialling system was introduced into the outbound call centre to increase calling efficiency and assist in meeting hourly quotas.

A more competitive atmosphere was introduced into the call centre with more emphasis on 'selling' results. These new positions and roles for the fund-raisers were a contentious issue amongst existing employees and resulted in some employees leaving. As indicated by the fund-raising manager:

the previous call centre manager was no, no, no, my staff are all going to leave, they are going to get angry, we can't do it. Anyway I have got a new call centre manager ... we went ahead with ... we had put together a communication to staff to explain why we are doing it, I went in and was there when we made it open, announced it to them, and if anything, I have only seen positive things come out of it ... Look, we basically said that we are going to implement this because we really want this to be a sales driven environment, a competitive sales driven environment, we feel that everyone will benefit by being able to see what your colleagues are doing. Then making you strive to work harder. (BD215)

This move to 'a competitive sales driven environment' was a huge change in practice and roles for Bukari fund-raising staff and involved hard-core direct marketing and was thus a major transformation of the discourse previously utilised within the organisation. Since implementation, results have increased and employees have embraced the new 'competitive sales driven environment' as evidenced by the comment

that - *'especially younger staff, younger male staff, they are into it, it is competition!'* (BD247).

Various incentives and rewards were introduced to motivate the tele-marketers. Whilst large rewards were not possible - *'we being a not-for-profit we don't indulge in giving out huge massive commissions'* (BH301), small non-monetary rewards were given to *'the person who has made the highest sales ... if you achieve a target, and the operator of the week'* (BH302). Also introduced was a commission-based system involving small monetary rewards. Increased sophistication has been added to Bukari's direct marketing by segmentation of donor client lists into - *'the new buying segment, the top supporter segment, the medium supporter segment and the low supporter segment'* (BD242). Tailored messages to each segment were introduced, and the preferred communication channel for each donor/lottery purchaser identified.

Another marketing technique that was introduced from the commercial world of marketing was 'life time value' which was regarded by the fund-raising manager as *'a brilliant tool to use'* (BD680). 'Life time value' takes a holistic approach to donor client contacts and aims to measure the total amount of revenue that can be gained from a donor client over a long period, rather than look at one-off transactions. For example, a regular monthly donor client of \$100 is perceived as more beneficial to Bukari than a once a year donor client of \$700. This has been utilised in conjunction with relationship marketing techniques in an effort *'to develop a longer time relationship with them'* (BH353). Likewise *'RFM which is commonly used in the direct marketing industry'* (BD698) was introduced, *'it is a brilliant tool that has helped revolutionise fund-raising'* (BD699). 'RFM' refers to 'recency, frequency, monetary' and aims to assess the probability of a previous donor client giving more money based on how recently they previously donated, how often they donate, and the typical monetary size of their

donations. Direct marketing analytics were also introduced to measure effectiveness regarding donor client reactivations and active donor client growth - *'there is a lot of measures that have come in place and they have been influenced from the external environment'* (BD712). Likewise, direct mail design was revamped - *'it was just a plain letter with a coupon, now people are doing all sorts of funky stuff ...'* (BD709). More aggressive donor client request activity was introduced, with the lottery ticket purchasers also asked for donations (resulting in an extra 2000 donor clients), and the frequency of lotteries was increased from three to four per year. These are examples of Bukari utilising more sophisticated marketing practices in keeping with a transformation to a marketing discourse.

Thus, Bukari transformed its old style charity fund-raising process to a new discourse centred upon cutting-edge direct marketing techniques adapted directly from the commercial world with the underlying aim, as indicated by the fund-raising manager that *'we really want this to be a sales driven environment, a competitive sales driven environment'* (BD220). Unlike the traditional charity model where employees were relatively passive in revenue raising, the new discourse within Bukari is characterised by an aggressive direct marketing focus requiring new subject positions for employees.

6.3.2.3 A new organisational identity

Coinciding with the introduction of the new discourse was an associated change in Bukari's identity and branding. The branding is recognised by the CEO as a work in progress because *'there was a cleanup to be done'* (BI312). Whilst maintaining the main characteristics of the original logo, the logo was modified with minor colour and styling changes. The trading name was changed slightly to better indicate the coverage

of the organisation. A specific word was also added (not mentioned within this thesis due to confidentiality) to make it '*a little bit more in your face, proactive* [than the original name which was considered to be] *old fashioned*' (BD423). A style guide was developed to ensure all materials were similar, because previously '*no two pieces of information that were produced were the same*' (BD345). Use of the new image and branding was a deliberate strategy by management to assist in introduction of the new discourse.

6.3.2.4 *Linking the discourses*

Despite the remaining employees typically accepting the new discourse and the shift to a more businesslike and market-oriented organisation, most employees, particularly the service providers still considered themselves to be working for different reasons than employees in a for-profit organisation.

Service providers typically considered employees in not-for-profit organisations to want different rewards compared to employees in a for-profit business - '*I think to work in a not-for-profit, you have to really feel for the cause, you are a different type of person, I think you have to be more compassionate towards people. I don't think it is as cut throat as what I imagine it would be, like if I was working at ANZ, I think I would always be looking over my back, someone is after my position or you are trying to climb the corporate ladder*' (BB298). Similarly, the senior manager in charge of fund-raising considered '*it is just nicer to wake up in the morning and say, I went and raised money to help people with [the medical condition] than to line executive's pockets with millions of dollars*' (BD449). It was perceived by employees that charities were typically fighting for funds, so large financial rewards were not expected, and that employees in

not-for-profit organisations typically worked *'more for the cause'* (BJ284). Thus, a component of the legacy discourse within Bukari is the attitude of numerous employees as perceiving themselves to maintain the charity ethos rather than a more for-profit attitude towards clients. This is a key linkage between the legacy discourse and the new discourse. Whilst employees within Bukari typically accept the new discourse, the service providers in particular steadfastly maintain their underlying charity ethos rather than seeing themselves as similar to employees within a for-profit organisation.

However, a more business oriented perspective seemingly ignoring the 'charity' ethos of the typical charity employees was offered by a senior manager brought into Bukari to assist the new CEO to introduce the new discourse, who indicated she worked *'here because fundamentally I want this business to work well and have high impact whoever its stakeholder group is. So I am really consumer focussed, I don't care [who] the consumer is'* (BG231). This is the subject position of a 'manager of a business' rather than 'manager of a charity' and could potentially cause problems if this manager does not appreciate the charity ethos of the service providers.

6.3.2.5 Resource priorities – service versus marketing

The charity ethos discussed above also has ramifications in relation to resource allocation. Whilst Bukari employees accepted and agreed with the need to utilise more market oriented and businesslike processes to survive, it was considered that the key difference between a charity and a typical for-profit organisation related to issues of money as well as the goal of the organisation. Sources of money for charities were seen as more restricted for charities compared with for-profit organisations. It was also regarded that whilst all organisations had performance targets, not meeting targets for a

for-profit simply meant less dividends and bonuses for senior staff and shareholders, whereas not meeting targets for a charity resulted in service recipient clients not receiving the appropriate services. This is a key point and the driver for some fund-raisers is not their personal financial reward, but ensuring Bukari's service recipient clients receive appropriate service. This indicates Bukari respondents regarded charities as more client focussed than for-profit organisations and that there is a greater need to meet performance targets in charities for the sake of the client. However, it was regarded that charities and for-profit organisations should fundamentally be operated the same way - *'there should not be any difference in the way they function as organisations'* (BG68). Likewise - *'I believe that there shouldn't be any difference between their level of professionalism, structure, accountability, whether it is for-profit or non-profit'* (BC95).

6.3.2.6 Competition from other charities – varying perspectives

Whilst some respondents considered Bukari had competitors, other respondents did not. The views were typically based on the role (specific subject position) of the respondent within the organisation. Service providers tended to downplay the idea of competitors, whilst those working in the fund-raising section had strong views regarding competition. As indicated by a service provider *'I don't [perceive any competitors], but I am sure fund raising people do because they are competing for the funds that are available'* (BE246). The CEO considered there to be competition in both service provision and revenue raising:

we've got heaps, look it is both profit and non-profit organisations ... in terms of non-profit organisations ... it is every non-profit organisation because all non-profit organisations are after the community dollar, they are usually after government

funding, philanthropic trust money and so on ... you are actually competing with every kind of non-profit cause out there, be it sport, disability, health, you name it. There are service providers in the profit field that may become your competitors as well. (BI358)

Thus, overall, ‘each and every charity is a competitor’ (BH353) as well as the State-based organisations operating directly in the same cause as the nationally-based Bukari. However, despite other charities being regarded as competitors, there is a certain amount of friendliness and co-operation as indicated by Bukari’s senior manager in charge of fund-raising:

I can pick up the phone and call the fund-raising manager up the road of another charity and say – “how is your tax appeal going?”, and they will tell me ... there is a bit of an openness, especially between colleagues, and, we share ideas and a lot of people call me up and [say] I am trying to do this, can you help me, or I have this new direct marketing staff on board, can you have a chat with her because you can give [her] a few ideas. (BD463)

Similarly, when installing new systems there is information sharing amongst ‘competitors’. This co-operation is a characteristic of charity discourse and is a legacy inherent in the new discourse.

6.3.3 The New Mode of Functioning of Language

Change within an organisation can be assisted by change in language use (Fairclough 1992), thus, a key indication of a successful discourse transformation is indicated by the introduction of a new ‘language’ into the organisation (Foucault 1991). There is extensive evidence of a change in language within Bukari. Introduction of the new language was very explicit. This new language was regarded by the CEO as the language of marketing/business and:

we were talking a different language and some of the staff who have remained and worked their way through have now “seen the light” and actually say, well, “we didn’t

even understand what you were talking about” ... there was a whole new language ... I came here talking about needing to see our services as products and really needing to understand our markets, even those simple words, didn’t mean anything to the people here. (BI199)

Despite Bukari ‘not producing commodities in the economic sense of goods for sale’ (Fairclough 1992, p. 207), the introduction of new language within Bukari, with the CEO referring to ‘products’ and the ‘markets’ is defined by Fairclough (1992) as ‘commodification’ and is a significant indicator of a change in discourse. The everyday language in use changed not only in spoken communications but also in written communications including ‘*internal documents*’ (BG181).

Whilst most employees saw the planned discourse change as positive, a problem identified by the CEO was the lack of ‘understanding’ of the new discourse by a majority of the existing employees. The use of new language was part of the newly introduced discourse, but the new language caused difficulty and some frustration for the CEO who indicated that the language:

probably hasn’t changed to the extent that I would have liked ... a couple of us were speaking a different language to everybody else here in what I think was a very old fashion non-profit and I tried to bring about change, possibly a little bit too quickly ... and I have almost had to step back a little bit ... I was actually doing little tutorials for a lot of the staff on what I meant by marketing and showing them a product development methodology ... all made perfect sense to me and a couple of other people but not to the bulk of staff ... it is changing but it is changing at a slower pace than I would have wanted. (BI274)

Use of language is part of what Fairclough (1992, p. 8) terms discourse technologization in which professionals ‘research, redesign, and provide training in discourse practices’. Bukari’s CEO was acting as a technologist of discourse change by introducing and training the employees in the language of the new discourse.

Not only was there evidence of new language being introduced, but also new meanings evolved for existing words. As commented by a service provider - ‘*we will all*

have a go at each other about jargon that we use, and, please explain, you know, what you are saying. After a few meetings you get to accept it and realise what people are talking about' (BB251). Similarly, another service provider commented that:

I ended up writing a ten page glossary every time I had heard something, I actually asked them what do you mean by that because we would be saying the same words and we would have completely different meanings to it and that made it difficult to actually understand. That wasn't just myself; it was most of the department with that acute nursing background who had not had any previous exposure to service marketing or any marketing concept. (BC173)

This employee has thus learnt, accepted and come to understand marketing language. The new senior management were from 'the language of marketing/business' and this was difficult for the existing employees, as exemplified by a long-serving employee who indicated that - '*we were saying the same words but with two completely different meanings ... it took me about eight months, in the first eight months to actually start getting the gist of where the new people were coming from*' (BC192). This is strong evidence that individuals put specific meanings on words based on their specific subject positions and thus their perspective and experience of life and how they see the world. The long-term employees of the original specific discourse within Bukari were using words differently to the newer employees, resulting in confusion. Due to the legitimated power vested in the subject positions of the newer managers, the meanings in use by the new managers ultimately resulted in a change in meaning of words in use within Bukari - a key component of, and evidence of discourse transformation (Foucault 1991). The process by which a specific meaning dominates another meaning is referred to as colonisation. The discourse colonisation occurring within Bukari was achieved partly via the introduction of new (marketing) language. The CEO, in effect, trained the existing Bukari employees to understand and accept the new interpretation.

6.3.4 Circulation of Discourse

In an attempt to ensure an overall acceptance of the transformation, senior management attempted to ‘sell’ the change to employees via persuasive communication typically via regular employee meetings. This however was not easy due to the entrenched nature within the organisation. As indicated by the incoming new CEO – *‘the biggest thing facing me has actually been trying to bring some cultural change about in the organisation. Because I could see the need to do things but I couldn’t get the, you know, it has been a struggle to get the troops to see where we needed to go’* (BI168). The fund-raising manager thought that the communication to employees had eventually succeeded - *‘I think the key, and I think we have done that reasonably well, is communicating the changes to staff before they are implemented, and if you communicate to people the change and you explain to them why you are doing [it] and what the benefit to the organisation is going to be [they will accept the need for change]’* (BD210).

In the service delivery area of Bukari, an initial review of services resulted in streamlining and uniformity of services throughout Australia. Increased use of technology in the form of teleconferencing and videoconferencing was also introduced, as was smarter planning of road trips for service providers that *‘helped to make it more sustainable’* (BF358). In the fund-raising area, more technologically up to date equipment was introduced into the outbound call centre. To increase efficiency, an automated predictive telephone dialling system was introduced to replace the manual dialling system for the tele-marketers. The almost doubling in productivity from 100 calls per hour to nearly 200 calls per hour has *‘been really successful and it’s good for the charity’* (BH197).

As indicated earlier in this chapter, the CEO admitted introduction of the new discourse had been too rapid and thus there was a slowdown in the introduction whilst employees became more familiar with the new language. Regular communication occurred throughout the organisation to ensure Bukari remained on track with the introduction of the new discourse, this was conducted via the newly introduced intranet and regular ‘action-tracking’ meetings for all employees and fortnightly management meetings. Given the relatively small size of Bukari, with the majority of employees located on the one site, informal communication by the CEO was utilised to complement the formal information dissemination. Elements of new managerialism were utilised to introduce and maintain the new discourse.

6.4 Chapter Summary

Analysis of Bukari utilising the framework of Foucault (1991, pp. 56-57) regarding the four changes that affect discursive formations has shown that there is strong evidence that the new CEO has successfully implemented a discourse transformation within Bukari in the past three years, with the traditional charity discourse being colonised extremely rapidly by a new, marketing discourse underpinned by a hard-core direct marketing model for revenue generation and a relatively ‘text-book’ services marketing model for service delivery. The senior management who were brought into the organisation to assist the new CEO to introduce the discourse transformation are very business oriented and see little difference between running a charity or a for-profit business, with commercial for-profit practices and models being perceived by them as totally relevant for use within a charity context. The speed of

introduction of the new discourse was deemed necessary by the new senior management team due to the existing dire financial situation of Bukari.

Participant positions and roles are a key issue in legitimising power, with power in Bukari being exerted by the senior management team. The CEO in particular was an actor who holds a subject position that warrants 'sufficient voice, as recognized by others' (Hardy *et al.* 2000, p. 1245) and regarded as a legitimate (Habermas 1979) influencer to instil 'dominant meanings in place' (Hardy & Phillips 2004, p. 307). The concentration of the power within the CEO for the discourse transformation is in part due to the relatively small size of the organisation. Whilst the CEO of any organisation has the delegated power to manage an organisation, the manner in which they utilise their power has a strong influence over whether the employees accept the managerial direction or whether they resist in some form. In large organisations a managerial structure typically delegates power to lower levels of management, however, with Bukari being relatively small (100 employees) significant levels of management do not exist and the CEO has direct contact, often face-to-face with the majority of employees on a regular basis. Introduction of a new CEO is a recognised way to commence a discourse transformation as a new CEO can offer 'not just new ways of speaking, but ways of thinking and acting' and these 'new ways of speaking' can assist in describing and justifying implementation of restructuring and new decision-making structures (Gewirtz & Ball 2000, p. 265).

The changes characteristic of discursive transformations (Foucault 1991, pp. 56-57) have been identified. There has been a displacement of boundaries of the original charity discourse, with components of market orientation being introduced into, and subsequently enveloping and over-riding the original discourse. The language utilised within Bukari constituted a strategic resource for the change with typical language of

business and marketing introduced to ‘rename things and people as new kinds of discursive constructs’ (Motion & Leitch 1996, p. 299) with the CEO taking time to teach employees the meaning of the new language. All four components of market orientation now exist within Bukari with strong emphasis on understanding customer needs and subsequently delivering efficient services. This has resulted in changed roles for employees, a key characteristic of new discourse.

The current employees accept the new discourse and perceive the benefits of the new discourse to be the increased amount of service provision that has become available for their service recipient clients from the increased revenue generated by the highly sales-driven direct marketing based fund-raising section. The employees who resisted the discursive change within Bukari ultimately resigned and left Bukari, or were eventually ‘sold’ on the new discourse. Significantly, the CEO brought into the organisation colleagues from the CEO’s previous organisation to assist with the transformation, this not only increased the proportion of senior management already positive towards the new discourse, but enabled a number of employees to act as discourse technologists (Fairclough 1992) to implement the changes rather than the CEO being the only agent of discourse change.

So great has been the change within Bukari that very few, if any, remnants of a ‘legacy’ discourse persist – the entire organisation has been revamped. Virtually the only remnant of the legacy discourse remaining within Bukari is the view by employees, particularly those holding service provision roles, that they are more client focussed than employees in more businesslike organisations. The introduction of the new discourse was regarded as a necessity to ensure survival for Bukari. Although there was some resistance to the new discourse, leading to some employees leaving, the majority of employees saw the need to change in order to survive.

Although Bukari operate with an underlying client first approach, the original poor financial position resulted in senior management focussing more so on donor clients to improve revenue, with less focus on service recipient clients where, indeed, the existing services were reviewed and the need for service provision efficiency resulted in a reduction and streamlining of services offered, due to financial necessity. This reliance on donor clients for revenue was exacerbated by Bukari's current minimal targeting of government grants as a revenue source. The success in improving Bukari's revenue via a revamped direct marketing capability will position the organisation to provide more emphasis on service recipient clients in the future – the long-term goal of the organisation.

This analysis of the Bukari discourse transformation has been based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations. Similar to the Arana case, it is considered that there were two phases through which the transformation progressed, leading to the current market/societal discourse. These phases were a new managerialism phase followed by a professionalism phase. Table 6.3 overleaf thus contains a summary of the discourse component changes within Bukari as it progressed through the various phases of the discourse transformation. As can be seen from the Table, various aspects of discourse transformation occurred within each of the transformation phases. The key displacement of discourse boundaries related to continued but expanded use of direct marketing for fundraising drawing strongly from direct marketing techniques. This change in boundaries was progressively established within Bukari over time as the organisation moved through the initial new managerialism phase into the professionalism phase until the ultimate charity hybrid was established.

Employees within the new discourse were required to adopt new subject positions and roles framed around more businesslike and professional behaviour with more streamlined and rigid service delivery procedures. Tension developed amongst some employees during the new managerialism phase of the discourse transformation as they realised they would be required to adopt new subject positions. Those who could not come to grips with the new required roles departed.

A new language based on the language of business was introduced within the new managerialism phase and progressively embedded with some employees not understanding this new language due partly to the speed at which the new discourse was being introduced. This required the CEO to train the employees in the new language. The newly appointed CEO introduced circulation of the new discourse very quickly with the assistance of new senior management. The speed of introduction was due to the poor financial situation of the organisation.

Table 6.3 – Summary of Bukari Discourse Component Changes

	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
Displacement of Discourse Boundaries	<ul style="list-style-type: none"> Continued but expanded emphasis on direct marketing for fundraising based on introduction of techniques from the for-profit arena Review and contraction of service provision for financial efficiency Retention of client first ethos but within financial means 	<ul style="list-style-type: none"> Introduction of revamped direct marketing capabilities Introduction of services marketing principles Retention of client first ethos 	<ul style="list-style-type: none"> Established direct marketing activities based on concepts from for-profit arena Retention of client first ethos
The New Position & Role of the Speaking Subject	<ul style="list-style-type: none"> Commencement of some tension due to initiation of change in overall organisation direction Introduction of formalisation and reporting of roles 	<ul style="list-style-type: none"> More formal and professional roles and required daily activities underpinned by introduction of standard practices and procedures. Increased accountability Increased emphasis on more formal and structured service provision Assisted by improved information gathering Introduction of some practices from for-profits Increased communication amongst departments Introduction of four key dimension sof market orientation Some tension due to continued change but lessening due to new service provision providing improved service for service recipient clients and overall acceptance and recognition of need to change to survive financially 	<ul style="list-style-type: none"> Embedding of new service delivery processes Progressive use of four key dimensions of market orientation

continued overleaf

Table 6.3 (continued) – Summary of Bukari Discourse Component Changes

	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
The New Position & Role of the Speaking Subject		<ul style="list-style-type: none"> • Very professional direct marketing capability introduced requiring change in positions and roles of fundraising staff • New trading name, revised logo consistent with change of organisation 	
The New Mode of Functioning of Language	<ul style="list-style-type: none"> • Rapid introduction of business terms 	<ul style="list-style-type: none"> • Issues with rapid introduction of new language requiring employee training regarding new language 	<ul style="list-style-type: none"> • New business language now more familiar amongst employees
Circulation of Discourse	<ul style="list-style-type: none"> • New CEO (with previous charity organisational change experience) employed • New Senior management employed (all hand-picked by CEO and possessing previous charity organisational change experience) • Rapid introduction (due to poor financial position of Bukari) 	<ul style="list-style-type: none"> • Hands-on by CEO & Senior Management (partly due to relatively small size of the organisation and majority of employees being located in one building) • Regular communication via intranet and employees meetings 	<ul style="list-style-type: none"> • Still being embedded by CEO & Senior Management with regular communication via intranet and employees meetings

In summary, this case study has shown how Bukari's new CEO and hand-picked employees recruited into the organisation have successfully employed the linkage of discursive acts and consequential practices (Hardy *et al.* 2000) to affect a rapid discourse transformation out of necessity for organisational survival. The new discourse is characterised by strong managerialism, marketing (utilising all four components of market orientation) with a focus on hard-core direct marketing for revenue generation to enable a highly efficient and effective 'text-book' services marketing model of service delivery to service recipient clients. This is illustrated in Figure 6.2 below.

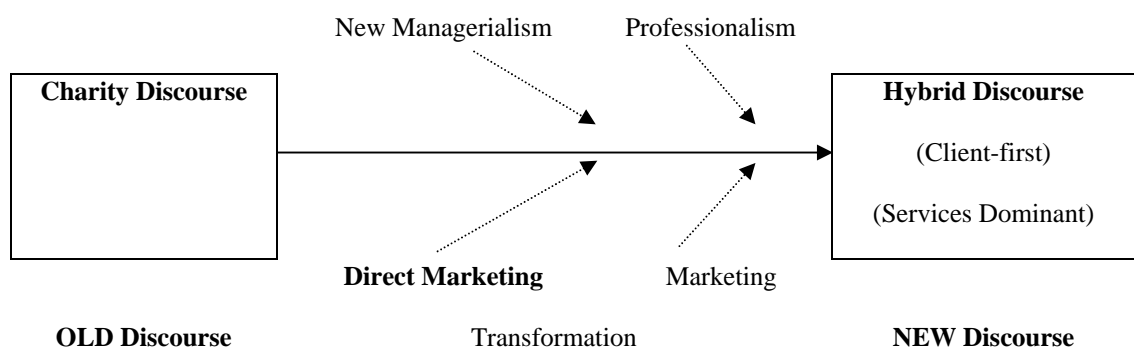


Figure 6.2 – *Discourse Transformation Within Bukari.*

CHAPTER SEVEN : CASE STUDY THREE – Camira

A Modern, Church-Based Perspective

7.1 Chapter Outline

The discourse transformation in Camira, the third case study organisation, is discussed and analysed. The chapter focuses on the distinct shift from a traditional religious-based charity discourse to a new, hybrid discourse of marketing and managerialism underpinned by an ongoing religious ethos. Similarly to the previous two case study chapters, an overview of the case organisation is offered, followed by an assessment of the discourse transformation based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations, namely displacement of discourse boundaries, the new position and role of the speaking subject; the new mode of functioning of language and lastly, circulation of the discourse. The chapter finishes with a summary of the case findings.

An outline of the chapter is contained in Figure 7.1 overleaf.

Chapter Outline	Section 7.1
↓	
The Organisation	Section 7.2
↓	
Mapping the Discourse Transformation	Section 7.3
<i>Displacement of Discourse Boundaries</i>	<i>Section 7.3.1</i>
<i>The New Position and Role of the Speaking Subject</i>	<i>Section 7.3.2</i>
<i>The New Mode of Functioning of Language</i>	<i>Section 7.3.3</i>
<i>Circulation of Discourse</i>	<i>Section 7.3.4</i>
↓	
Chapter Summary	Section 7.4

Figure 7.1 - Outline of Chapter 7.

7.2 The Organisation : Camira

Camira is the ‘urban mission and community care arm’ (Camira n.d.) of the Sydney operations of a Christian-based church. Headquartered in western Sydney, Camira was originally formed over 150 years ago and provides ‘care of the aged, provision for the disadvantaged, and the love of Christ expressed in practical ways in the surrounding community’ (Camira 2007a, p. 1). Regional offices are located throughout the greater-Sydney area, with 1,400 paid staff and 2,000 volunteers providing the range of services listed in Table 7.1 overleaf.

Table 7.1 – *Services Provided by Camira*

Segment	Services
For Children, young people and families	<ul style="list-style-type: none">• Community Care Centres• Child, Youth and Family services• Disability and Carer Services• Counselling
For Communities	<ul style="list-style-type: none">• Second hand clothing shops• Migrant and Refugee services• Disaster Recovery• Chaplaincy• Social policy & evaluation
For the Aged	<ul style="list-style-type: none">• Residential aged care• Community aged care

Camira was struggling both financially and operationally and conducted a major re-structure in 2006. The then CEO (with a theological background) retired and all six general managers also left the organisation. A new CEO was recruited from the business world to re-invigorate the organisation. This was the first time that Camira has ever had a CEO from a non-theological background. A strategic plan was developed which ‘assumes the future is dynamic and changeable’ and was ‘based on a detailed scan of the internal and external environment’ in which Camira operates and ‘aimed to engage a broad range of stakeholders through interviews’ (Camira 2007a, p. 2). Thus, introduction of a new CEO with a strong business background signalled the commencement of a new era for Camira, with a more market-oriented discourse being introduced. The ‘new’ Camira currently has four broad divisions - aged care, community care, strategic support and a policy unit. Not only does Camira aim to provide aged care and community services, but also a key goal is to ‘be recognised as an independent, informed Christian contributor to debate on public policy’ (Camira 2007a, p. 10), hence the formalised ‘policy unit’.

Table 7.2 below indicates the financial performance of Camira over the past three years. Whilst Camira is seemingly in a reasonable financial position with the return of a small net surplus each year, day-to-day operations typically operate at a deficit. It is the investment returns from over \$60 million invested in managed funds that provide ongoing non-operational revenue to assist Camira to ultimately operate at a small annual overall net surplus. Government funding accounts for 57% of Camira's total income and steps have recently commenced to reduce reliance on government funding via development of corporate donation income streams.

Table 7.2 – *Camira Financial Performance* (Camira 2007b, 2008a, 2008b).

	2005/06 \$ million	2006/07 \$ million	2007/08 \$ million
Operating Revenue (Govt. & clients)	51	51	55
Operating Expenditure	60	61	62
Operating Deficit	9	10	7
Net Revenue from investments, donations and property sales	14	18	20
Net Result	5	3	8

Despite the introduction of a more businesslike perspective, Camira still maintains a strong religious base and aims for all senior management and other key positions to be filled by Christians from Bible-based churches.

Within the grounds of research confidentiality, a profile of the employees interviewed for this research is contained in Table 7.3 overleaf. It should be noted that only current employees were interviewed. Former employees were not interviewed within this research. All interviews were voluntary. Whilst it is not known if any employees invited to be interviewed chose not to be interviewed, it is possible that the views of any such employees may have differed from the views of those interviewed and may thus not have been captured in this research.

As detailed in Section 4.3.4.4 above, theoretical sampling was utilised. As noted from Table 7.3, there was a relatively even gender mix interviewed. The majority of employees interviewed were over 40 years of age. The number of years of employment with Camira varied somewhat, although 47% of respondents had less than five years employment.

Table 7.3 – Profile of Camira Respondents

Respondent Code	Function	Gender	Age	Years with Camira
CA	Public Affairs	F	30-40	6
CB	Fundraising – Co-ordinator	M	>40	1
CC	Service provider	F	<30	2.5
CD	Fundraising – co-ordinator	F	30-40	5.5
CE	Service section - Manager	F	>40	11
CF	Regional Manager	M	>40	1.5
CG	Admin – assistant	F	>40	1.5
CH	Regional Co-ordinator	M	30-40	1.5
CI	Service co-ordinator	F	>40	12
CJ	Acting CEO	M	>40	3
CK	Manager – donor client service	M	30-40	3
CL	Fundraising - Manager	M	>40	5
CM	Service provider - Admin	F	>40	7
CN	Service provider - Senior Manager	M	>40	9
CO	Service provider - Manager	F	>40	20
		Count Male = 7 = 47% Female = 8 = 53%	Count <30 = 1 = 7% 30-40 = 4 = 27% >40 = 10 = 67%	Count <5 = 7 = 47% 5-10 = 5 = 33% >10 = 3 = 20%

7.3 Mapping The Discourse Transformation

7.3.1 Displacement of Discourse Boundaries

This section commences with examination of what respondents regarded as a traditional charity discourse. Differences between traditional charities and for-profit organisations are subsequently addressed, and then the shifting boundaries of the discourse to develop a new competitive strategy are identified, indicating a discourse transformation based upon market orientation with a modern church based perspective. Specific aspects of the new discourse are then discussed, namely identification of the existence of the four key dimensions of market orientation, revenue raising by government tendering, identification of increased use of services marketing and relationship marketing. The section concludes with assessment of the level of interdiscursive tension within the new discourse and also explores the mixed views respondents possess regarding marketing.

7.3.1.1 Traditional charity discourse

Prior to discussing the current discourse operating within Camira, respondents' views regarding a traditional charity discourse were obtained. Respondents within Camira typically considered a traditional charity discourse to involve a reliance on donations (particularly from the older population), be operated mainly by volunteers under a very hierarchical infrastructure from older style premises in the suburbs and with minimal finances. The discourse was also regarded as often Christian based and

generally offering a ‘band-aid effect’ without aiming to look into the underlying cause of the service recipient clients’ issues.

The charity workers were typically regarded as *‘grey haired volunteers, usually women’* (CH30) and *‘very kind hearted, well meaning and wanting as their main focus to provide a service to people’* (CO36). The lack of resources is indicated by the charities being perceived as being *‘funded off the smell of an oily rag’* (CO35) with the premises regarded as *‘somewhat second hand looking buildings’* (CH30).

Overall, the traditional charity was regarded as well meaning but without sophistication or resources. In other words – *‘not have the kind of systems and approaches that you would find in for-profit environments’* (CL53), *‘they have a really right and good intention but probably lack the resources to get the work done properly’* (CO37) and *‘happy to stay in their little realm and won’t move forward and is not looking at expanding and moving with the times’* (CD73). The unsophisticated nature of most traditional charities is due to the typically volunteer nature of management and the lack of business and managerial skills. Even if management is sophisticated enough to want to plan for the future and want to grow, the lack of resources is a key obstacle to growth.

7.3.1.2 Differences between traditional charities and for-profit organisations

Given that the more market-oriented and professional charities are often regarded as closer to for-profit organisations than to traditional charities, it is interesting to assess the views of Camira employees regarding the differences between traditional charities and for-profit organisations. Relative to for-profit organisations, traditional charities were regarded by Camira respondents as *‘more engaged with the common*

good, the social good' (CJ87) rather than profit motives. This resulted in differing cultures and goals between for-profit and not-for-profit organisations. The for-profit organisations were considered to *'definitely have a money making focus'* (CA64) basically for money's sake, whereas the not-for-profit organisations were aiming to make money, not for money's sake, but *'to assist people'* (CA65). In other words, *'the outcome from a [for] profit [organisation] is money to shareholders, the outcome for [a] charity is long term or longer term social benefit'* (CB152).

Not-for-profit organisations were also regarded as being more interested in the overall wellbeing of clients – *'I think [charities have] a lot of heart for people'* (CC59), and their *'focus is on assisting people to live their lives in as healthy a way as possible'* (CO55). This compares with the perception that typical for-profit organisations were more interested simply in profits, potentially at the detriment of clients and *'out to sell product and I guess they want to convince their clients that the product will benefit their lives but it is not necessarily the focus of their true intention'* (CO57).

Another perceived difference between not-for-profit organisations and for-profit organisations was that not-for-profit organisations were regarded as being under surveillance from the public and thus need to operate more ethically than for-profit organisations who *'could probably get away with a lot more than a not-for-profit would; in the way that they market themselves'* (CD80). The perception that not-for-profit organisations were under more public view was due to people donating money to these organisations in good faith with the expectation the money would be used appropriately.

7.3.1.3 Shifting boundaries : a competitive strategy

Respondents typically considered that a traditional charity could survive in the future in small niche areas and that *'people still think they can trust the traditional charities a fair bit'* (CK54), but overall there was an over-riding view of a need to adopt more businesslike practices. The need to change was regarded as typically *'to keep up with the world as it is'* (CM66) because *'it's changing times'* (CC68). Change was also considered as needed to enable charities to relate more closely to the newer generations and younger demographic, not just service recipient clients, but donor clients as well. In regards to the younger demographic it was stated that charities *'need to be making the most of the technology to reach the Gen Y's and the Gen X's and just to be able to reach out to them and to be relevant to them'* (CG47). The younger people were also demanding greater value, accountability and transparency - *'to know that their money is being well spent ... transparency [that] is the same as what you find in the corporate world, they want management rigor, transparency in their accounting, they want to have auditable reports'* (CE166). Another reason given for the need for charities to change related to staffing. The typical volunteer charity workers were aging and are now often being replaced by either volunteers or paid staff from the for-profit sector that bring new skill sets.

The view that traditional charities should change was emphasised by the comment that the majority of charities had indeed already changed, as indicated by a middle manager - *'I think most of them have changed, I don't think there are many left with the old view, I think some of them are playing catch up with their resources and the buildings they work from ...'* (CO69).

The increased tendency of governments to give funds to the not-for-profit sector to deliver various services was also suggested as potentially decreasing the amount of money traditionally donated to charities by the public who may adopt the attitude that *'I am paying my taxes, the government is giving the money to the charity, [thus charities] don't really need my money anymore'* (CJ97). The increased level of operating costs needed to meet government reporting and accountability requirements compounds this potential decrease in funds from the public.

Whilst most respondents recognised the need to change, it was emphasised that a charity *'should not forget where it comes from and the key principles of why it exists'* (CD97). Thus, in any discursive change, there should be components of the legacy (charity) discourse continuing. The need to change can be summarised by the views of a middle manager who indicated that charities were going *'to have to be more efficient, they're going to have to be able to speak the language of commerce ... they're going to have to be able to prove that they are being effective ... and the call for transparency is going to be greater and greater'* (CL113).

7.3.1.4 Discourse transformation : Market Orientation with a modern, church-based perspective

Following on from the previous section that discussed Camira's general acceptance that traditional charities need to change in some way to meet modern requirements and demands from society, it is apparent that Camira has adopted a somewhat generic businesslike approach to market orientation but with a very strong, underlying, church-based religious ethos to achieve its own unique style of market orientation. This will be discussed in the following pages.

7.3.1.5 Existence of the four key dimensions of market orientation

Lafferty and Hult (2001) suggest there are four key dimensions of a market orientation – emphasis on customer, importance of information, interfunctional coordination and taking action. There is distinct evidence that all four dimensions exist (to varying extents) within the new Camira discourse.

The first key dimension of a market orientation is ‘emphasis on customer’ (Lafferty & Hult 2001). There is strong evidence that Camira is customer oriented. The importance of service recipient clients to Camira is indicated by comments from respondents that *‘without the [service recipient] client we don’t exist’* (CD375) and service recipient clients are *‘what we’re here for’* (CC246). ‘Clients’ can be viewed from differing perspectives for charities. Clients are not only the people who receive services from Camira, but also can be regarded as the donors as well as the government who fund the organisation. Whilst donor clients were regarded as important to Camira, service recipient clients were regarded as more important. As indicated by a fundraiser – *‘the [service recipient] clients are the reason why we are here, the donor [clients] are the people who provide the money to do it’* (CK245) however *‘government provides a huge amount of funds as well, so Camira could still run if we didn’t do any donations’* (CK251) albeit with reduced services. The government is also regarded as a client (source of funds) and is also a key focus of Camira. The various perspectives of clients, namely service receivers, donors and government, and who was the most important were to a large extent based on the specific subject position of the respondent. Whilst service provision has long been the aim of Camira, there appears to have been a discursive shift towards even stronger service provision that is more in keeping with

service recipient client and donor client needs. This ‘emphasis on customer ’ (Lafferty & Hult 2001) and meeting client needs is a feature of a market orientation.

The second key dimension of a market orientation is ‘importance of information’ (Lafferty & Hult 2001). Camira does not however, at least as yet, have a totally formalised information management system. In regards to information gathering, analysis and dissemination, the acting CEO indicated that *‘we are not very good at that, we are trying to get better but that is certainly one of our priorities to get better, better process around data collection ... I think it is getting a little better but it is like turning the Queen Mary around, it takes time’* (CJ265). Indeed, a middle manager suggested that the *‘information that we need and how that data is captured and processed is probably the area that we are least sophisticated in’* (CF295).

Whilst it is recognised that information usage needs to improve, it is regarded by service deliverers that Camira is *‘actually looking more into what our statistics are showing’* and thus *‘looking at producing services that are more to the need of the [service recipient] client than what we actually think the [service recipient] client should have’* (CI105). In relation to service recipient clients, information is obtained directly from referring bodies such as Department of Community Services and Centrelink. Feedback is also requested following provision of services, however it is currently *‘very basic stuff’* and Camira are *‘working at the moment on developing some more sophisticated ways’* (CL484). Feedback from service recipient clients is regarded as essential for Camira, with the acting CEO indicating that *‘without [service recipient] clients we don't have a reason for existence, we are increasingly becoming more aware of the importance of getting client feedback’* (CJ280).

Exit surveys are also conducted, and, in the welfare services section, follow-up surveys are done to measure if the services have *‘made a difference in their lives six*

months down the track' (CL492). Camira have also introduced a programmed schedule of forums to gain service recipient client feedback. However *'the difficulty of course is the [service recipient] clients, they sometimes don't want to give feedback because there is a lot of confidentiality involved and deep personal stuff and to start asking questions is sometimes to break the ego'* (CJ296). In other words, Camira is shifting the boundaries from its previous operating activities within the legacy discourse and introducing a new range of (market oriented) discourse practices that are becoming characteristic of the newly introduced discourse.

The greater emphasis on employees introduced with the new discourse also resulted in employees being surveyed in 2007 for the first time ever. This not only enabled Camira management to evaluate employee reactions to the introduction of the new discourse, but to also gain valuable information to enable the organisation to plan future employee services. Thus, a more consultative managerial style was introduced in the new discourse, a significant movement of boundaries from the previous style of bureaucratic management.

To collect intelligence regarding their competitors, Camira donate small amounts of money to other charities, resulting in Camira being added to the mailing lists of these competitors. This subsequently enables Camira to receive the ongoing mailings from their competitors that are then examined for intelligence. Various reports analysing the sector are also purchased. These reports typically benchmark Camira against other charities on a range of measures.

Traditional direct marketing practices have been introduced to assist fund-raising processes. Case studies of service recipient clients are developed, and consultants are utilised to provide information regarding the specific types of direct marketing campaigns relevant to specific target age groups. There is a general reliance

on consultants to provide direction and guidance regarding direct marketing activities. Corporates are also researched to gain information regarding their donation preferences.

The third key dimension of a market orientation is 'interfunctional coordination' (Lafferty & Hult 2001). The large number of employees and the geographically spread nature of Camira in itself can result in difficulty with communication. The previous discourse within Camira was characterised by a 'silo mentality' whereby sections kept to themselves resulting in less than optimal overall organisational communication. Inter-functional co-ordination was originally very poor within Camira and steps are currently being taken to improve communication as indicated by the acting CEO - *'It is a huge challenge for an organisation the size of Camira in the silo mentality, it's that tension between expertise and collaboration ... we have actually nominated that as an issue and try to put in place cross divisional working parties and groups'* (CJ305). A senior manager stated that *'it was actually frowned upon to actually talk to people from other divisions and you had a process where you had to go to someone's general manager to get permission to go and talk ... it was quite very bureaucratic'* (CL551).

Communication has improved significantly since the introduction of the new CEO but it was generally regarded by respondents that the problem still existed. A typical comment was that - *'Communication is a huge issue ... and the executive team are actively working at that ... it is improving but it is still a huge gap because of the size'* (CK266). Likewise, as indicated by a service provider - *'I think we were basically disjointed back when I first come on, in actually communicating ... I don't think we've quite actually got there, I'd say we're about 40 to 50% of the way'* (CI334). In other words, the previous management style discouraging informal communication amongst employees, and the need to gain permission to communicate outside an employee's specific operating area was very entrenched and the new CEO is still unravelling it. This

is an example of a discursive practice being so much part of daily activity and melded into the discourse that it is not possible to simply change it overnight.

Whilst communication within divisions and sites was now regarded as good, the current problems related mostly to inter-divisional communication. Attempts to improve this involved creation of a 'leadership forum' across divisions that included both senior managers and team leaders. As indicated by a service provider, *'we know a lot about what happens within [our section] but not necessarily a lot of what goes on in other divisions'* (CM235). This is a particular issue for large charities with dispersed geographic locations.

The introduction of strategic planning days to which all staff are invited and encouraged to attend has broken down some barriers to communication. An organisation-wide monthly newsletter was introduced in 2007 both electronically and in hard copy for paid staff and volunteers. Each divisional section also has a quarterly newsletter. The staff newsletter contains *'a lot of stories from services, as well as a lot of the decisions that have been made and explanations for it by the executive team'* (CA285).

The fourth key dimension of a market orientation is 'taking action' (Lafferty & Hult 2001) and as indicated in the above discussion, there have been numerous improvements to the manner in which Camira operates and takes action. The identification of the market orientation criteria of Lafferty and Hult (2001) within Camira's new discourse establishes that a transformation to a marketing discourse has taken place. There has, in particular, been an improvement in service provision, however, as acknowledged by various managers, there are still improvements to be made, particularly in the areas of information management and interfunctional coordination.

7.3.1.6 Revenue raising - emphasis on government tendering

A traditional charity discourse is characterised by reliance on donations for revenue raising. As indicated in Table 7.4 below, Camira generated revenue of \$74.5 million in 2007/08. The key revenue source was government grants accounting for 57% of revenue. Investment income from over \$60 million of accumulated surpluses invested in the stock market are the second largest revenue stream followed by service recipient client charges (fee for service) then donations/bequests and the second hand shops and clothing recycling.

Table 7.4 - Camira Revenue Sources (Camira 2008b).

Revenue Source 2007/08	\$ million	%
Government	42.7	57
Investments	7.0	9
Service recipient client charges	6.1	8
Donations & Bequests	5.0	7
Asset disposal	4.9	7
Shops & recycling	4.0	5
Misc	1.6	2
Other	1.5	2
Nursing home accommodation	1.0	1
Parish allocations	0.4	1
Diocesan grants	0.3	0
TOTAL	74.5	100

Thus, Camira have developed sources of revenue that are different than the traditional charity revenue sources. They have developed a more businesslike approach in adopting tendering to win government contracts resulting in government funds being the prime source of Camira revenue. A key change within Camira, not due specifically to the change in discourse, but due to the increased emphasis on sourcing revenue from

government grants has been an increased accountability to governments with a senior manager indicating *'there's a lot more red tape, a lot more reporting of statistics ... all those things that go with operating a service. Some of which we certainly see as being essential in some parts, but in other areas it's a bit onerous ...'* (CL124). This has resulted in the need for increased and more formalised systems. Thus, there are resource implications associated with Camira's targeting of government funds.

The downside of the government funds is the potential cessation of funding as well as the numerous reporting requirements and the inability to use the revenue for other services. The non-government revenue streams are still regarded by Camira as vital, not only as a safeguard if some government funds cease, but to allow flexibility in revenue usage, with a senior service manager indicating that with the non-government monies *'there's no restrictions on you to say we [have] got to do this amount of work for this amount of money, it's about, ok, here's what we want to do in the community'* (CL161).

Donations are of less importance than government revenue but a key, ongoing revenue source. This lesser reliance on donations has resulted in Camira's fund-raising section being relatively small and somewhat basic with no real cutting-edge techniques utilised or realistically needed. Camira does not have a call centre and typically relies on contacting potential donor clients via traditional postage services. Utilising a database of 14,000 previous donor clients, six to eight appeal letters are sent out annually and each letter typically contains three to five 'good news' stories regarding recent service recipient client assistance. As indicated by a fundraiser- *'we ask for money, we give them a story and we tell them why we need the money and if they are happy with it, they send the money back to us'* (CK124). Some use of email to contact potential donor clients is commencing. Database segmentation is utilised with customised letters sent to

different segments. Camira's website home page includes a 'donate now' button. The specific type of funding regime adopted by Camira is reflected in the particular aspects of marketing discourse upon which Camira concentrates. Strong reliance on government funding requires use of relationship marketing, and less reliance on donations justifies a less developed and less sophisticated direct marketing resource.

Clothing collection bins leading to revenue via sales of second hand clothes have been a traditional, albeit small revenue-raising source for charities for a number of years. This revenue source accounts for only 5% of Camira revenue but nevertheless is a consistent ongoing source.

7.3.1.7 Improved services marketing

The move to a more market-oriented discourse by Camira has also resulted in a change in service delivery methods resulting in a distinct change from the previous discourse boundaries and practices. Existing programs were examined from a perspective of viability and sustainability. The subsequent, newly developed services were concentrated on four key areas of expertise (business priorities) namely disability, counselling, family support, and emergency relief and thus become more focussed on key competencies. Summarising the change in service provision, a services middle manager considered Camira have '*become more professional [and] more structured*' (MO351) and similarly '*I think we have taken on more, some businesslike processes in the delivery of services in the last few years*' (CO86). This has in part been internally driven, but also partly externally driven by government as a requirement to obtain funding.

Professional practice teams were formed and are a key resource in service analysis and change. The teams were formed for key services (e.g. counselling, emergency relief, disabilities) and consist of key experts from various regional offices who deliver similar services. The teams *'oversee the core business components of our work in each service delivery segment ... they oversee the delivery of services and talk about clinical issues and how to improve things and how to monitor service and evaluate service. So it is basically about making sure that the service is delivered in the best possible way'* (CO352).

The two key areas of change within service delivery have firstly been to ensure viability, and secondly to offer a more holistic approach. Existing services and programs were reviewed in regards to long-term viability – *'we have changed staffing models in order [to] make it more efficient [and] looking at which is the best way to be able to deliver that service in order for us to meet that need out there in the community'* (HB425). Increased recruitment of managers from outside the sector also enabled fresh eyes to view existing services. As indicated by a middle manager – *'I came from outside the industry ... if I couldn't see a reason why we were doing something a certain way, I would ask the question why, and if I could think of a better way to do it, I sought to change that'* (CH294).

Adopting a more holistic approach has been aimed *'to meet people's needs rather than just the band-aid type approach'* (CN563). This is most relevant in the emergency relief area where Camira is *'looking to move from the welfare model to the sustainable living model'* (CF422) which is outcomes-based to treat the underlying cause rather than simply treat the symptoms. As indicated by a services senior manager, the new service delivery model is based on the philosophy that *'you give a man a fish and feed him for a day, you teach him how to fish he does it for life'* (CN334). This has

also required a more trained and professional organisation – *‘we’re expecting more of our staff, we’re expecting greater emphasis on training and people having the skills to do the job rather than coming from ... volunteers ... now we’re asking people to have a particular qualification and the skill set to meet people’s needs’* (CN566). This new holistic approach provides improved client service, but requires more professional and skilled employees. Thus, although existing employees already possess a caring, client first attitude, these employees may potentially not have the skills to provide what the organisation requires. The organisation needs to recognise this, and offer training to employees. An issue however is whether the existing employees have the underlying ability to be trained and understand the new service delivery approach.

Not only has service delivery to service recipient clients changed, but also to donor clients, with a move to more online communication for both efficiency and to reach a younger market. Also, donor clients are being asked to change the nature of their donations to assist Camira to offer a holistic approach to donor clients. For example, donor clients have been encouraged to provide money instead of physical goods, because, as indicated by a regional manager – *‘by donating food, and when we give that food to the [service recipient] client, we are actually reinforcing the welfare state, and wouldn’t it be great if they could go and shop, just like you and I do, by giving them say a Woollies or a Coles card’* (CF358). Donor clients typically gain some level of personal satisfaction by donating physical goods. It is possible that the new approach of Camira to ask donor clients to now simply provide money may not necessarily provide donor clients with the same level of personal satisfaction, despite this new form of donations providing better outcomes for the service recipient clients whom the donor clients are ultimately aiming to assist. Camira is thus attempting to change the discourse boundaries for service recipient clients (as well as donor clients

who typically donate physical goods) and introduce a totally new philosophy regarding the service delivery and the manner in which service recipient clients behave in the new discourse with the aim for service recipient clients to take more responsibility for their own future.

Given the large geographic coverage of Camira, a key challenge with service delivery is balancing a standardised service model across the entirety of Camira with the need to customise service delivery in specific regions due to the range of service recipient clients. For example, Camira ‘*are grappling with how to better support indigenous communities ... but to develop a service model for working with indigenous communities in Nowra is quite different to dealing with indigenous communities in Mt Druitt or in Darlinghurst because they are completely different, they are not the same*’ (CJ336). (Nowra is a country town outside Sydney whereas Mt Druitt and Darlinghurst are outer and inner suburbs of Sydney respectively). Whilst standardisation of discourse practices, in this case service delivery, results in efficiencies and minimisation of service gaps in accordance with services marketing theory (see, for example Lovelock *et al.* 2004; Zeithaml & Bitner 2003), the large geographical coverage of Camira and the subsequent range of service recipient client needs creates unique problems for Camira which is not an issue for charities who have a smaller coverage.

In keeping with the major changes to service delivery within Camira, there have also been improved measures of service quality. Camira aims to provide high quality services as evidenced in the strategic plan by the goal to ‘identify gaps in service’ (Camira 2007a, p. 10) and improve service delivery. Service quality is measured throughout Camira, both in the service divisions as well as the fund-raising section. Service recipient clients and volunteers are surveyed. Likewise, other external agencies are surveyed as to ‘*whether they actually are willing to work with us and refer* [service

recipient] *clients on*' (CI372). Camira's major funding source is the government and a key requirement for continued government funding is a strong quality reporting process and integrated monitoring framework. Government assessors visit Camira to examine the framework and obtain evidence. As indicated by a senior manager, Camira '*go through a review and audit process every three years*' (CN580) and the government officials also interview staff and service recipient clients.

Service quality in the fund-raising section is measured in various ways including measuring of response times in replying to donor client queries, as well as time taken to send receipts for donations. Camira also contracts an external call centre to contact current and old donor clients to survey them regarding Camira's service quality, but this donor client contact activity also serves a second purpose - '*the ultimate goal is to get a donation from these people because they may not have given over 12 months*' (CK305). In other words, Camira is utilising sound marketing practices to not only ensure service quality, but also concurrently use direct marketing processes.

7.3.1 8 *Elements of relationship marketing*

Camira operates as the charity arm of a church and relies to some extent on donations and volunteer support from the various parishes within the greater-Sydney region. Under the previous discourse, the parishes '*knew who Camira was, but there was no relationship there, there was no bond; we were just seen as the [church's] charity who kept asking for money ...*' (CD171). Likewise, Camira '*just basically worked solo, they weren't seen to be working together and so it was basically one hand didn't know what the other hand was doing*' (CE170). A key development following the move towards a more market-oriented discourse was relationship development with the

parishes. The concerted effort to establish improved relationships with the parishes was regarded as successful and Camira *'can see the positive results that are coming out of that'* (CE164). Concurrent with the change towards a marketing discourse, this improved relationship with the parishes has also re-established the church-based linkage in the new discourse, something that had been deteriorating in the legacy discourse.

Camira has also created a new, head office based role entitled 'Corporate Partnership and Strategy Manager' with the aim to increase non-government revenue by developing relationships with corporates and their employees to increase donations and assistance in kind. Camira's policy unit researches social policy and publishes various reports. This is not only done to influence the national social agenda, but is a strategic relationship marketing activity aimed to *'influence government'* as Camira *'would prefer not to have to tender for contracts but rather be influencing government to fund initiatives that we have researched and created because it is a much better model, rather than being told here is a tender, here is a spec, you deliver service and there are all sorts of constraints around that'* (CF183). Thus, Camira is deliberately utilising policy recommendations as a means of gaining greater power and control within the discourse.

7.3.1.9 Minimal interdiscursive tension

After the restructure commencing with redundancy of numerous senior managers, the subsequent change in discourse did result in some resistance from employees and some resignations. These employees were, however, replaced with new employees who were more appreciative and accepting of the new discourse. As indicated by a long-serving middle manager:

it was massive change and [employees] could see that, but in the last two years they can see the difference, it has made a difference to them in a positive way, in a way that where we were some years ago to where we are now. A lot of staff did leave, the ones that couldn't accept the change or didn't want to come on board, so they obviously left and went into other organisations and as we have had new staff or newly recruited staff, well, that just becomes the norm. (CE117)

It is now generally regarded that the majority of the current employees accept the new discourse. A staff survey conducted in 2008, two years after the discourse changes commenced indicated *'widespread satisfaction about the changes'* (CJ144). Some of the staff who were subjected to the discourse *'questioned the value of it, but they're still here and I think that they can see it was all good'* (CD155). Similarly, the changes were *'pretty foreign to our ... way of working, but most people now have seen it as definitely improvements that were long overdue'* (CO114). Ultimately, whilst Camira respondents recognise that their organisation has changed discourse and in fact become stronger as a result, they still consider that the charity ethos remains and can operate hand-in-hand with the marketing discourse. Having said this, some see the new discourse operating within Camira *'as being too cold, and too impersonal ...'* (CB230). The overall consensus of employees regarding the changes can however be summed up by the comment from a regional manager that *'I think [employees] are appreciative of the new professionalism that is coming into the organisation'* (CF133). Thus, whilst the displacement of the discourse boundaries has resulted in new experiences and requirements for employees, overall the changes have been regarded positively.

Whilst change has occurred within Camira resulting in a new discourse, there is still a key remnant of the original charity (legacy) discourse. The main remnant of the charity discourse is the Christian based ethos. Retention of this remnant was deliberate by management, as it was perceived that this Christian ethos was the historical foundation of Camira and although a new discourse was required to ensure Camira's

long-term survival, retention of the Christian ethos was paramount both to maintain faith with existing employees and to also re-establish a connection with the parishes, a key source of donations. As indicated by a senior manager *'a lot of people work here because of its Christian ethos, I think quite a few people are drawn to the organisation because of their Christian faith'* (CJ231) and a service provider - *'I think there's a greater focus on our Christian heritage, and a desire to let people know about the reasons why we do what we do unashamedly and boldly'* (CA113). Similarly, as commented by a member of the fund-raising team – *'I think we are clearer about our Christian identity ... part of the problem that we had in the old structure was that we had a number of people ... who were taking Camira down a journey which was causing dis-junction with our key stakeholders, that being the [churches]'* (CL181).

7.3.1.10 Mixed understanding of marketing

Introduction of the new, more market-oriented discourse has resulted in a more businesslike approach within Camira. The majority of the market-oriented activities have been rather implicit and not highly visible or explicit. Respondents typically considered marketing to be 'promotion'. Bearing this in mind, the majority of respondents considered marketing methods used by for-profit organisations were relevant to be used by charities, but caution was required. There were mixed views amongst Camira staff, some had positive views regarding marketing because it was perceived as a good thing if the community became more aware of Camira, whereas others considered marketing wouldn't be a good thing as it would result in too many extra service recipient clients. Thus, dependent upon subject position, promotion can be considered a double-edged sword – positive in creating awareness to gain more

donations, but negative in generating more service recipient clients wanting assistance. Given resource constraints, any increase in service recipient clients would need a corresponding increase in donations from donor clients to fund servicing of the new service recipient clients.

There was a perception amongst some respondents that marketing methods were expensive, could on occasions be seen as stretching the truth and be too slick. Based on respondents' perceptions of marketing in general, a level of cynicism regarding the nature of promotion by for-profit organisations existed. As indicated by the acting CEO - *'I think there is a reflex in the community against being too slick, I think if you wanted to market Camira like some sort of commodity, it may alienate more people than it attracts, I think people get a bit dubious about slick marketing for organisations involved in social good, I think they get a bit cynical about that'* (CJ362). Staff who had a more negative view of marketing tended *'to be the older crowd and generally come from the finance or administrative side of things'* (CD230) as well as service providers. Thus, subject positions and job roles within Camira tended to influence respondents' views regarding use of marketing.

Marketing was perceived as *'quite expensive'* (CE495) and given the perception that money was always in short supply in the not-for-profit sector it was typically considered the *'money could have been used more on service'* (CO164). Even the fund-raising section was mindful of using direct marketing campaigns that were too elaborate – *'It's fairly much, just your two page letter appeal and response form and reply paid envelope ... we're sort of limited what we can do because you put too many pretty pictures in there and people think you're wasting money'* (CD482).

There was also the view that marketing tends to over-hype a product, and Camira is thus somewhat wary due to previous bad experiences – *'I do know in the past*

we've actually had [service recipient] clients come to us with one of our brochures or information that we've put out for fund raising purposes saying, you know, "what is this?", this is not [accurate] ... so I suppose it's around looking how we do it and making sure that it's done appropriately (CN591). Likewise, it was emphasised by a senior manager that the key with marketing was to present *'an honest image of what we actually do'* (CN311) because it was felt that some of Camira's previous marketing had been inappropriate because after reading a brochure or seeing a television commercial the Camira staff *'would sit there and say wow. I work in that program but we don't do that! Or, that's not how we present it, or that's not what we're really about'* (CN315). Similarly, a regional manager considered marketing appropriate *'as long as you are not selling something that you are not ...'* (CH342).

Use of online marketing was regarded as highly relevant for charities, particularly in relating to targeting younger generations. As indicated by a fund-raising staffer - *'if you are not a funky new age sexy charity, then you may struggle ... with the youth ...'* (SP321) and *'people like World Vision ... put stuff into You Tube and things like that and it has really worked for them, they have got half a million hits on some of the videos that they have put out, it is just really clever marketing ... they have adapted to the modern types of marketing'* (CK333).

Despite these cautions, in summary, most respondents considered marketing was appropriate if done correctly for the organisation. As indicated by a senior manager - *'there's lots of things from the business world or the for-profit sector that we can gain and look at and say well how can we use this, how do we adapt it. As long as it's done in the context of who we are ...'* (CN600). Likewise a regional manager considered marketing can *'definitely [be used] but subtly, we cannot fall into the trap of the for-profits, or even some of the more aggressive charities in being noisier and louder than*

them, we have to have a point of difference and be subtle and be very aware of our image and build on that strength rather than just being like everyone else but only louder and bigger’ (CF434).

7.3.2 The New Position and Role of the Speaking Subject

A new discourse is typically associated with people behaving and acting differently than in the old discourse. Elements identified and discussed within this section are the increased level of professionalism introduced throughout the organisation, linkages with the legacy discourse and the differing subject positions taken by employees regarding competition.

7.3.2.1 Towards professionalism

The previous discourse within Camira was regarded as unsustainable and perceived as needing to change so that Camira could survive in the new environment. The previous CEO did not have a business background, but had a religious background and, as indicated by a service provider - *‘I don’t think that he had a clear grip on what was happening out there in the real world’ (CD112)*. The culture and work practices were also seen as inappropriate. There was little consultation outside head office regarding key business decisions, communication was regarded as poor, and the various divisions worked in silos. The previous discourse could be summarised by the following comments from a senior manager – *‘The organisation was losing lots of money, it wasn’t working, we had a different culture in the work place which, I am not going to say it was awful ... but ...[we needed a new] look for the organisation and that came*

about with new people being appointed in the role as directors and the staff that we employ and looking at better practices as well too' (CE86).

Commencement of the discourse transformation occurred in 2006 following retirement of the previous CEO and introduction of a new CEO with a business background. A major management restructure and introduction of Camira's first strategic plan occurred. The six existing general managers left Camira, and were replaced by three directors. This top-level management revamp resulted in a '*major cultural shift in the workplace*' (CE77). Whilst the new CEO had legitimated power, the new CEO also had a different identity to the previous CEO. The new CEO identified with a business/professional discourse with a religious faith as an underlying driver, whereas the previous CEO identified simply with a religious faith as a primary driver of all actions and had little business acumen. Thus, whilst faith was still a valued component of the new CEO's identity, it was not the over-riding factor. The new CEO is regarded by respondents as providing an ideal balance between the much needed business perspective whilst maintaining the religious perspective. As indicated by a senior service manager - '*we got a CEO who had been in business himself, now, that had never really happened before, we had always had clergy at the helm ... so this period in our history is actually one where someone who is very used to being in business and thinking that way, who also has a very compassionate heart for people, so is able to put the two together, but he has brought with him a lot of good business practices*' (CO101).

New identities were developed for the new leadership roles. There was '*a huge investment by the organisation as a whole in terms of leadership training and support, seeing our leaders as driving change and driving good practice*' (CJ123). For example, one senior manager was funded to attend an intensive course on not-for-profit

organisational management at Harvard University. Thus, the identity of managers changed - they were trained to, and tasked with, ensuring the discourse change occurred smoothly.

Similarly, not just at management level, but throughout the organisation, employee skills were identified as a key development area and a 'leadership development program' commenced in 2007 in partnership with selected universities. This enabled existing employees within Camira the opportunity to gain increased skills that complemented the new discourse within the organisation.

Perhaps the key improvement as a result of the new discourse is the increase in communication and the empowerment of employees. This empowerment is a distinct change in the role and identity of the employees. As indicated by a service provider - *'I think [the changes] have been really good in the fact that I think its brought the organisation [together], because we're so widespread, I think its brought us more together. The ground level workers I think are having more of a say and more of an involvement in what Camira's future is'* (CI119). This is also reinforced by comments from a regional manager who suggested that *'probably the biggest change, and I think it is probably the most significant change, is the establishment of professional practice teams'* (CF151). These teams are comprised of employees in similar service functions at different sites and are charged with policy and procedural development for the specific services. These teams not only enable organisational discussion of service delivery processes but also *'immediately reduces the impact of a structure creating silos'* (CF159). Thus, the discourse transformation has to a large extent been positive for the employees and they appreciate and readily accept the new roles available.

Camira also aimed to depict the identity of their service recipient clients differently than in the past, with the use of service recipient clients in marketing

campaigns regarded as needing careful handling. Camira wanted to depict service recipient clients in a positive manner rather than a tugging at the heartstrings manner – *‘an eye to not exploiting any of our [service recipient] clients, and promoting any stories about our work in a strengths-based way rather than in a please help the poor people’* (CO365). This positive depiction of service recipient clients *‘encourages people to use the service when they need it and to not feel embarrassed’* (CO375). Traditional charity discourse draws upon notions of people needing help, being objects of pity, personally tragic, low achievers, dependent on others, and victims of circumstance. This is what Camira is trying to get away from, and thus develop new subject positions and identities for their service recipient clients.

7.3.2.2. A new organisational identity

Since the introduction of the marketing discourse, to date, minor but subtle changes to the Camira identity and brand have occurred. The Christian image has been retained and is considered by respondents to have been emphasised, particularly to re-establish the link between Camira and the churches. As commented by a middle manager – *‘I think we are much clearer about our identity and what it means to be Camira. I think we are clearer about our Christian identity’* (CL181). The key change to identity has been the increased professionalism and the move away from being perceived as a charity, to an organisation that assists service recipient clients to get back on their own feet via the new holistic service delivery approach.

A style guide was introduced and literature was changed *‘to get away from sad pictures of child looking grubby, with grubby faces, to things that looked a bit more empowering’* (CO223). Some change to the physical appearance of Camira occurred,

with *‘a move to make our offices more office-like, our premises more office-like and professional because that was seen as part of our image and a way of moving from the welfare look to the community service look’* (CO221). One respondent did however indicate that Camira’s multi-storey head office replete with prominent signage in a central business district did potentially convey a highly corporate image associated with high running costs – an image that could deter potential donor clients.

There is a view within Camira that some stronger rebranding is needed as Camira is *‘losing a lot of our older donor [clients], and Camira brand as it stands at the moment is too old, it’s not funky’* (CD286). Camira is in fact currently looking at a rebranding, however, as commented by the fund-raising manager – *‘over the last three to four months we’ve developed a new branding strategy which we want to submit to Council to consider, which will involve a change or refreshment of our visual brand, our logo, but I was told recently like in the last week or so that we have to hold off on to that at the moment in order to sell that to Council’* (CL286). Thus, whilst management is mindful of the need to change identity of the organisation in keeping with the new identity and new discourse, this is one aspect that management wants to look at more closely to ensure the appropriate new identity is developed.

Camira’s policy unit that is involved in conducting social research and aims to influence national social policy provided a key part of the organisational identity development. These activities are regarded by a middle manager as a key *‘point of difference to most organisations’* (CF100) and aim to position Camira as experts and leaders in social reform agenda. Public policy formation processes can be used *‘to legitimate new discourses and their associated ‘truth’*’ (Motion & Leitch 2009, p. 1058), thus, involvement by Camira in influencing national policy creates power and leverage for the organisation.

The organisational identity that Camira strives to achieve and reflect the underlying religious ethos can perhaps be best summed up by the comment offered by a service provider who suggested that Camira would be successful if it was regarded as - *'A loving, caring, compassionate, community organisation, that's not afraid to stand up for those who are vulnerable and marginalised in society. And who are unashamedly doing it for God'* (CA410).

7.3.2.3. *Linking the discourses*

The current vision of Camira is to change the lives of people and grow communities via care through Jesus Christ. Camira focuses on developing a 'socially inclusive society', which 'involves identifying the many problems and challenges faced by our service recipient clients and working together with them to find solutions that meet immediate needs and address the long-term underlying causes of the issues they face' (Camira 2008a, pp. 4-5). This vision was clearly identified within the minds of all respondents with extra comments offered defining Camira's purpose as *'to be able to touch people's lives, to influence them, not only in physical ways and material ways, but also with the word of Christ'* (CI34), *'to do good works, as an outpouring of our belief and putting our faith as Christians into action'* (CN28) and *'my purpose here is to walk alongside clients who are in financial difficulty'* (CC42). Thus, the underlying faith-based perspective is strongly evident in all the respondents' views regarding their work within Camira and is a key legacy from the previous discourse.

Despite respondents' acceptance of the more businesslike approach in the new discourse, which is more closely aligned to for-profit organisations, Camira employees typically considered themselves as different to people who work in for-profit organisations. It was generally viewed by respondents that employees within charities

had more job satisfaction than employees in for-profit organisations. This was because charity employees were working directly with people and were *'able to see the value of their work and people's lives changing'* (CN435). This was enhanced by *'helping people instead of just lining pockets with profits'* (CK188). The Christian perspective also is a factor with one respondent stating they gain satisfaction from *'contributing to God's work on earth'* (CA224). The typical perspective can be summarised by the comment from a service provider - *'One of the rewards I find with working here as opposed to working in business is just the fact that you're doing something constructive to help people in their lives'* (CM184) and a middle manager – *'it wasn't about money, it was trying to make a difference'* (CH196).

7.3.2.4 Competition from other charities – varying perspectives

Competition is a typical aspect of the for-profit organisational market place. Competition in the charity sector is viewed from various perspectives by Camira respondents and is typically based on the respondents' subject position. From a service delivery perspective, other organisations are generally not regarded as competitors. The reasons being, as expressed by various service providers – *'a lot of the time we try and work with the other organisations'* (CC225), *'the issues that we are addressing are beyond the sum total of all of us in this business'* (AS319) and *'we try to work together with them, so that we can best meet the needs of the clients'* (CG239).

From a tendering perspective for government grants, the same organisations that Camira works with to assist service recipient clients do in fact become competitors, which makes relations with the 'competitors' interesting. As indicated by a middle manager:

where before we might have had a good relationship and shared a lot of information and ideas and paper work and stuff like that with say, Centrecare or another NGO, during the competitive tendering process, unfortunately, all bets are off and everyone gets a bit more protective of the information ... during the tendering process it is quite a challenge to stay friends, we talk to each other but we can't tell each other things.
(CO278)

Another situation in which other charities are regarded as competitors is when looking for new staff and volunteers. From a fund-raising perspective, other charities were regarded as competitors all the time. The fund-raising section perceived their competitors on a range of tiers. The most direct competition was regarded as coming from other Christian charities, followed by any charity within the welfare space, followed by any other kinds of charities. The least direct competition was regarded as basically any items that are purchased by people using discretionary income.

7.3.3 The New Mode of Functioning of Language

Discourse change can be assisted by new language (Fairclough 1992) and is thus also an indicator of a discourse transformation (Foucault 1991). There is evidence of a change in language within Camira. Words such as 'strategic plan', 'strategic directions', 'viable and sustainable', 'key performance indicators', 'performance reviews', 'risk management' and 'core business' have been introduced and are a regular part of daily conversation and in documents including the strategic business plan. These words are characteristic of a businesslike discourse and in keeping with the introduction of the marketing discourse and increased professionalism. Whilst there has been increased use of more businesslike language, the word 'telemarketing' is not used, but is referred to by the term 'donor care calls'. This downplays the link to marketing, and offers a softer, more caring approach to the target donor clients. Despite the change in discourse and

the associated change in language use, in keeping with the aim of re-establishing the underlying Christian ethos, there is still '*a lot of Christian language*' (CK110) utilised.

A middle manager suggested that '*there are some people who don't like that [new] language and other people who are fine with it. Generally speaking, the younger Gen Y's and X's are happier with that language [whereas] the boomers and above have a little bit more suspicion about it*' (CO192). Likewise, the use of business language is seen differently by different subject positions and can potentially cause confusion for employees. Whilst Camira's head office '*use a lot of corporate language*' (CB333) the language spoken by service providers is different. As indicated by a head office based business development manager charged with targeting corporates for donations '*there's sometimes loss in translation*' (CB338) when talking with service providers because the activities of the service providers have to be packaged by me '*as a saleable item to a corporate*' (CB339).

Significantly, coinciding with the new discourse, Camira have tended to no longer use the word 'charity'. This is linked to the new image Camira wishes to convey (and not be perceived as practising a charity discourse), and is also linked to the directional change in services from 'band-aid' solutions to offering more holistic long-term service recipient client solutions. As indicated by a long-serving services middle manager - '*not being called a charity, so that's not in our language anymore ... you can't use the word charity, non government organisation, community based organisation, and you can put in brackets, formally known as charities!*' (CO379). This move away from a charity discourse has also resulted in a change of language regarding Camira's activities. For example, the word 'welfare services' has been changed to 'community services' which was a reflection of how the division '*wanted to portray*

ourselves as, not just offering welfare but a more holistic approach to the care of people’ (CN124).

Thus, new language has been a characteristic of the discourse transformation within Camira. The new language has been utilised as a discursive resource in two key ways. Firstly, the language of business has been introduced to reflect the new discourse, and secondly, management has utilised deliberate replacement of existing words as a strategic resource to abruptly and explicitly change the mindset of employees (e.g. the change in mindset from ‘welfare’ to a new mindset of ‘community services’). In other words, the new business language is used alongside the previous language, but in some cases deliberately replaces old language.

7.3.4 Circulation of Discourse

As previously mentioned, the discourse change within Camira was implemented by the new CEO following retirement of the previous CEO. The key to commencement of circulation of the new discourse was the injection into Camira of new senior management with business experience, typified by the comment from a long serving service delivery manager - *‘I think we have got a lot smarter in that we employ the right people for the roles, I think that makes a big difference’ (CE156).*

Development and implementation of the new discourse involved senior management openly inviting the involvement of employees to provide input into the strategic planning process. The resultant strategic plan was subsequently extensively distributed throughout the organisation and is a readily available document on the Camira website. *‘It was the first time [Camira] had a strategic plan that had involved staff, the previous one had been very much a top down approach by the senior*

management' (CN253). Involvement in strategy development was well received by employees with a respondent indicating that *'there's a lot more communication from management to staff about planning and processes so people feel involved in their charity and in their work place; which is a good thing'* (CD205). Strategic planning days were held with staff invited to attend. Whilst many staff were sceptical, they were typically won-over and very positive about the planning days. A typical comment from a service provider being:

I must say a lot of people went quite unhappily ... but I actually it was a very good day and I came away feeling very encouraged and I got an opportunity to share with others about the kind of work they are doing and I found the whole day very rewarding. Just came away feeling excited about the work I do and the organisation I work in ... and I think people also felt that they were being heard and even though they were lower down in the organisation, that they did get an opportunity to have their say. (CG181)

Also, local regional centres were able to develop their own plans that linked into the overall strategic plan rather than simply have a plan imposed by management. This involvement of employees enabled management to gain buy-in from the employees into the new discourse from the very beginning, at the grass roots planning stage of the new discourse rather than attempt to 'impose' a specific direction on the employees. This greatly assisted management to introduce the new discourse with minimal resistance or tension.

7.4 Chapter Summary

Foucault's (1991, pp. 56-57) criteria for detecting changes in discourse have been the underlying framework for the analysis of Camira. There is plentiful evidence

that a discourse transformation has occurred within Camira. The traditional church-based charity discourse within Camira was transformed somewhat rapidly following a senior management re-structure in 2006 with a displacement of boundaries resulting in an introduction of numerous components of marketing discourse to colonise the existing discourse whilst maintaining a strong church base. The new discourse contains strong evidence of market orientation including services marketing to deliver services to service recipient clients, and relationship marketing to improve and develop ongoing relations with fund providers (government, parishes and corporates). The typical language of business and marketing has been introduced into the charity by management, indeed, use of the word 'charity' has been discontinued in keeping with Camira's new service delivery model. The new language utilised within Camira has in itself constituted a strategic resource for the change. Concepts such as 'strategic plans' were immediately introduced and buy-in from employees was invited via attendance and participation in strategic planning days.

Whilst there can be ongoing conflict and struggle to introduce new discourses, the initial 'struggle' within Camira was somewhat short in duration as the previous CEO retired and the existing six general managers were made redundant. A new CEO with a business background (the first non clergy CEO in Camira's 150 years of existence) was brought into the organisation to introduce the discourse transformation. This commenced with a major re-structure of senior management and was highlighted by involvement of all employees in development of a new three-year strategic plan. The discursive activities conducted by the new CEO and his three new direct reports created a new discursive 'regime' - from a traditional charity organisation to a more businesslike organisation adopting a market orientation but still keeping an underlying religious ethos. The transformation within Camira was successfully conducted by the

new CEO and senior management who hold legitimated subject positions by virtue of their formal position within the organisation.

Management within Camira analysed the existing discourse within the organisation and deemed change was required in order to meet the increasingly competitive environment, and introduced processes to instigate and embed new practices and also empowered staff via extra training. This involved a process of research, redesign and training (Motion & Leitch 2002). Although there was some resistance to the new discourse resulting in some employees leaving, the majority of employees saw the need to change. The current employees overall accept the new discourse and perceive the benefits of the new discourse to be a more viable and sustainable operation offering more client centric services. It appears that those who initially resisted the discursive change within Camira eventually came to accept the new discourse.

The employees gained new roles and subject positions characterised by increased professionalism and greater empowerment. The key differences between the legacy discourse and the new discourse were regarded by respondents as - increased professionalism, improved management, more strategic direction, increased use of technology, improved communication and involvement of employees in the planning process.

A new discourse typically will not neatly replace a legacy discourse but will be positioned as 'superior to the legacy discourse' (Maguire & Hardy 2006, p. 24). Virtually the only remnant of the legacy discourse is the deliberately retained church based ethos that was regarded by the CEO as an essential element to retain. Indeed, there was a deliberate attempt by senior management to increase the emphasis of the religious base partly in an attempt to re-engage with the parishes that are key sources of

donations and volunteers. A decline in acknowledgement of religious ethos in the old discourse was seen as an issue for various stakeholders. Thus, not only did management introduce a new discourse, they utilised and re-invigorated the religious ethos as a tool to make the new discourse more palatable for key stakeholders.

This analysis of the Camira discourse transformation has been based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations. Similar to both the Arana and Bukari case, it is considered that there were two phases through which the transformation progressed, leading to the current market/societal discourse. These phases were a new managerialism phase followed by a professionalism phase. Table 7.5 overleaf thus contains a summary of the discourse component changes within Camira as it progressed through the various phases of the discourse transformation. As can be seen from the Table, various aspects of discourse transformation occurred within each of the transformation phases. The key displacement of discourse boundaries related to continued but expanded use of direct marketing for fundraising drawing strongly from direct marketing techniques. This change in boundaries was progressively established within Bukari over time as the organisation moved through the initial new managerialism phase into the professionalism phase until the ultimate charity hybrid was established.

Employees within the new discourse were required to adopt new subject positions and roles framed around more businesslike and professional behaviour with more streamlined and rigid service delivery procedures. Tension developed amongst some employees during the new managerialism phase of the discourse transformation as they realised they would be required to adopt new subject positions. Those who could not come to grips with the new required roles departed.

Table 7.5 – Summary of Camira Discourse Component Changes

	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal Orientation
Displacement of Discourse Boundaries	<ul style="list-style-type: none"> • Introduction of social entrepreneurialism • Maintenance of underlying client first and religious ethos 	<ul style="list-style-type: none"> • Progression of social entrepreneurialism including government tendering • Increased targeting of corporate donors • Maintenance of underlying client first and religious ethos 	<ul style="list-style-type: none"> • Embedding of social entrepreneurialism • Maintenance of underlying client first and religious ethos
The New Position & Role of the Speaking Subject	<ul style="list-style-type: none"> • Development of some tension due to initiation of change • Broad acceptance of need for change 	<ul style="list-style-type: none"> • More formal professional roles and required daily activities • Increased emphasis on more formal and structured service provision • Assisted by improved information gathering • Use of relationship marketing to develop corporate and government links • Holistic service delivery • Introduction of style guide to direct consistent new organisational identity • Increased use of four key dimension sof marke torientation • Formation of ‘professional practice teams’ and ‘leadership forums’ across organisation • Improved cross-functional communication 	<ul style="list-style-type: none"> • Embedded use of four key dimension sof marke torientation • Embedding of new service delivery processes and formal reporting

continued overleaf

Table 7.5 (continued) – Summary of Camira Discourse Component Changes

	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal Orientation
The New Position & Role of the Speaking Subject		<ul style="list-style-type: none"> • Improved cross-functional communication • Introduction of formal training via University • Introduction of some practices from for-profits • Increased use of KPI's • Some tension due to continued change 	
The New Mode of Functioning of Language	<ul style="list-style-type: none"> • Introduction of business terms 	<ul style="list-style-type: none"> • New business terms become more familiar 	<ul style="list-style-type: none"> • New business language now normal
Circulation of Discourse	<ul style="list-style-type: none"> • New CEO (from for-profit sector) employed • New Senior management employed • Underlying Christian based ethos 	<ul style="list-style-type: none"> • Employee attendance at strategic planning days to gain buy-in • Underlying Christian based ethos 	<ul style="list-style-type: none"> • Across-organisational committees for uniformity • Underlying Christian based ethos

A new language based on the language of business was introduced within the new managerialism phase and progressively embedded with some employees not understanding this new language due partly to the speed at which the new discourse was being introduced. This required the CEO to train the employees in the new language. The newly appointed CEO introduced circulation of the new discourse very quickly with the assistance of new senior management. The speed of introduction was due to the poor financial situation of the organisation.

In summary, this case study has shown how Camira's new CEO (from a business background) and a new senior management team have successfully employed the linkage of discursive acts and consequential practices (Hardy *et al.* 2000) characterised by employee consultation to affect a discourse transformation. The new discourse contains aspects of new managerialism, marketing (utilising all four components of market orientation) with maintenance of the Christian based ethos as a legacy from the original charity discourse. This is illustrated in Figure 7.2 below.

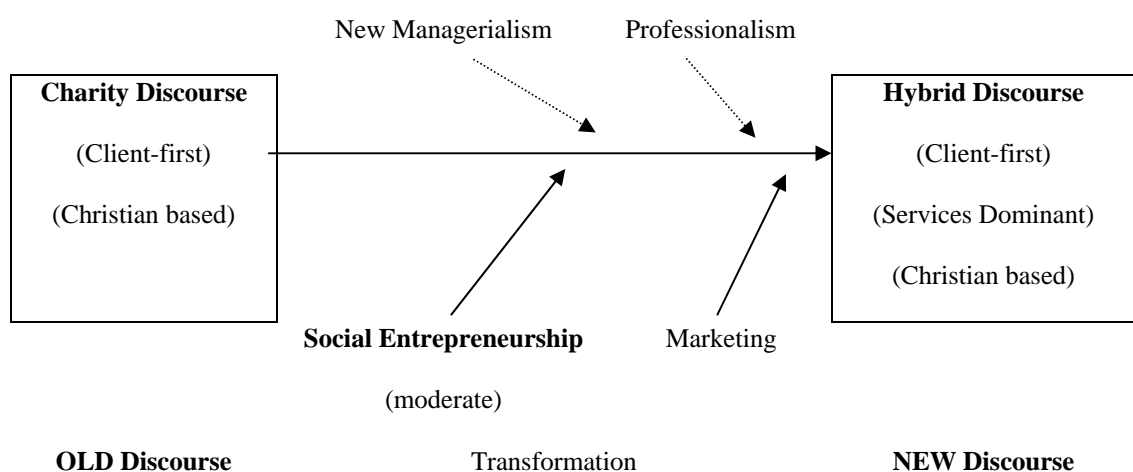


Figure 7.2 – Discourse Transformation Within Camira.

CHAPTER EIGHT : CROSS-CASE COMPARISON

8.1 Chapter Outline

This chapter contains a cross-case comparison of the discourse change within the three case organisations, and analyses the similarities and differences between the cases. This enables the subsequent development of a conceptual best practice framework presented in the next chapter for the management of change within charities as managers try to improve organisational performance.

Section 8.2 compares the three cases and assesses the discourse transformations based on Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations, namely displacement of discourse boundaries, the new position and role of the speaking subject; the new mode of functioning of language and lastly, circulation of the discourse. Section 8.3 then provides a chapter summary.

An outline of the chapter is contained in Figure 8.1 below.

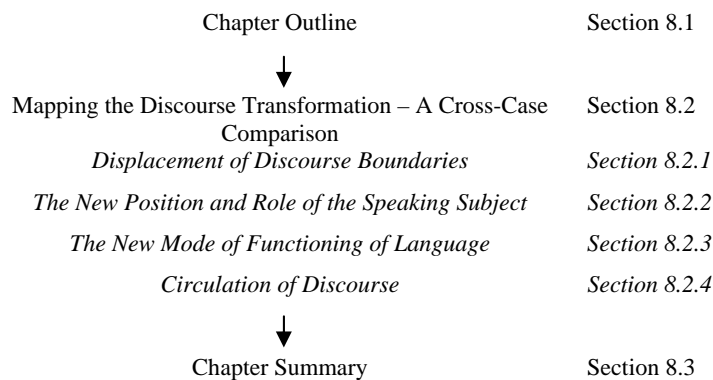


Figure 8.1 - Outline of Chapter 8.

8.2 Mapping The Discourse Transformation – A Cross-Case Comparison

Following the in-depth ‘within-case’ analyses in each of the previous three chapters, it is now appropriate to conduct a ‘cross-case’ analysis (Eisenhardt 1989) to examine similarities and differences between cases. Within this section these aspects are assessed under Foucault’s (1991, pp. 56-57) four criteria for identifying discourse transformations.

A key discovery when analysing each of the three cases was the commonality that all three charities progressed through a ‘new managerialism’ phase then a ‘professionalism’ phase prior to reaching a market/societal orientation model. Thus, to assist the comparison across cases within this Chapter, Tables 5.3, 6.3 & 7.5 from the previous three chapters have been utilised to develop the composite Tables 8.1, 8.3, 8.4 & 8.5 in this chapter. These Tables provide a composite summary of the changes within each charity during the phases of transformation (new managerialism and professionalism leading to market/societal orientation) for each of the four criteria for identifying discourse transformations Foucault’s (1991, pp. 56-57). These Tables will be referred to in discussions as appropriate within this chapter.

8.2.1 Displacement of Discourse Boundaries

8.2.1.1 Traditional charity discourse

Respondents in all three charities had similar perspectives of a traditional charity discourse. The overall perception of traditional charity discourse was that it was characterised by a range of aspects - a struggle for funds, a portrayal of service recipient clients as victims, small scale and narrow focus, reliance on volunteers, lack of innovation, inefficient, unsophisticated, reactive and offering 'band-aid' solutions and welfare based. This view of traditional charity discourse suggests a relatively non-professional and non-businesslike mode of operation.

The traditional fund-raising models typically relying on donations from an aging population financed the charities. In the face of increasing competition, these models can be considered unsustainable as well as making charities vulnerable to revenue fluctuations and thus impacting on service delivery.

8.2.1.2 Differences between traditional charities and for-profit organisations

Respondents in all three charities considered that the key difference between not-for-profit and for-profit organisations was the focus of the organisation. Not-for-profit organisations were regarded as more client-focussed and had less regard for costs, whereas for-profit organisations were perceived as more cost-focussed and service delivery was predicated on the cost of providing the service. This is a key point that needs to be considered by management when introducing a more market-oriented discourse into the charity. Maintaining a client-focus within a new discourse needs to be made via appropriate communications to employees to minimise resistance to the new

discourse. This perception of client-focus was also linked to charity workers perceiving themselves as more caring than their counterparts in for-profit organisations. Emphasis on the client is a key component of market orientation and it could be argued that not-for-profit organisations already possess this component. However, the aim to assist service recipient clients with little regard to cost can potentially affect long-term sustainability of the organisation. Thus, management needs to determine a cost-effective balance between continuation of the traditional strong client-focus of charities versus service delivery cost.

8.2.1.3 Shifting boundaries : a competitive strategy

Respondents typically considered the traditional charity discourse could survive but only in limited niche situations and that, realistically, charities needed to change to survive in the modern environment. The need to change was due basically to an aging volunteer base, increased competition for funds, the public requiring more accountability and transparency regarding where donations are spent by charities, increased emphasis on government funding (also requiring accountability) as well as a need to become more attuned to younger new potential donor clients (Generation X & Y). This changing environment has resulted in the need for charities to become more businesslike (Polonsky & Grau 2008) to survive. Senior management of all three charities recognised the need for change, as did most other respondents. However, there was an over-riding perception of the need to maintain a charity ethos. This has resulted in tension within the new discourse – *how to be businesslike but still be a charity?* Thus, the ‘charitable’ nature of benevolent not-for-profit organisations is an essential remnant of the legacy discourse. The CEO of Arana summarised the *raison d’être* of charities -

‘Although we need to be businesslike and entrepreneurial we shouldn’t aspire to be just a business or just an enterprise. The community sector has at its heart a very different values system to the commercial world. ... It is important that we continue to honor this heritage ...’ (Arana 2008, p. 6). As mentioned in Section 2.2.2.2, Sargeant, Liao and Foreman (2002) as well as Duque-Zuluaga and Schneider (2008) regard the term ‘market orientation’ as inappropriate when transferred to the not-for-profit sector. They have suggested it be replaced by the term ‘societal orientation’ given the aim of the sector, including the charity sub-sector, is not related to a specific market, but is aimed at society overall. The comments of the Arana CEO give support for the use of the term ‘societal orientation’.

8.2.1.4 Discourse transformation : a range of models

A key finding of the research is that although each of the three charities have undergone a discourse transformation to a new, more market oriented discourse, each charity has employed a different model, particularly in regards to revenue generation. This has key implications for management within charities. There is a need for charities to change to become more competitive and improve performance, but there is no single ‘generic model’ that management of charities should strive towards. Charities should identify any existing strengths and capabilities within the current organisation, and use these as a starting point towards creating the new organisation. In other words, leverage any existing strengths. For example, Arana leveraged their social entrepreneurship strengths and Bukari their direct marketing strengths. Figure 8.2 overleaf summarises the models identified for each charity discourse transformation with each charity characterised by a new, hybrid discourse. The key commonalities within the discourse

transformations in all three cases were the transition phases through which each charity progressed, namely new managerialism and professionalism. Within these transformation phases, core issues and emerging concepts related to the aspects of marketing that were introduced and, in two cases, issues related to social entrepreneurship.

Each organisation originally operated a relatively typical traditional charity discourse. For significant organisational change to occur, there firstly must be recognition from top management (Board of Directors and CEO) for the need to change, then, secondly there must be appropriately skilled senior management available to introduce the change. Arana's management in the early 2000's were more visionary than the management within Bukari and Camira, recognised the need to change and progressively moved to a new discourse over a few years with minimal management changes. This contrasts with the top management of Bukari and Camira in the early to mid 2000's who did not see a need for change. It was not until the mid-2000's that the Boards of Bukari and Camira recognised the need to change, considered the existing CEO's were not appropriately qualified to lead the organisational change and subsequently replaced their CEO's. Thus, the discourse transformation within Arana was gradual and less rapid than within both Bukari and Camira where the new discourse was introduced rapidly. A key difference between the charities was the religious-based aspect of Camira that was an underlying influence on their discourse.

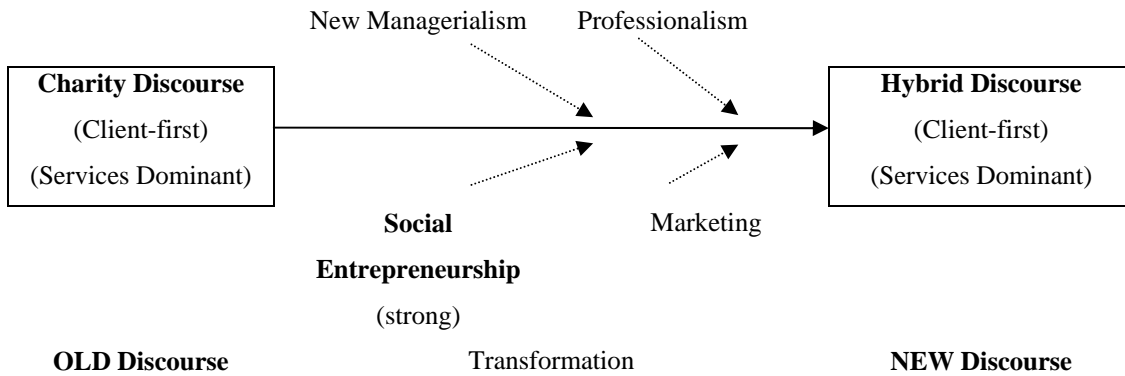
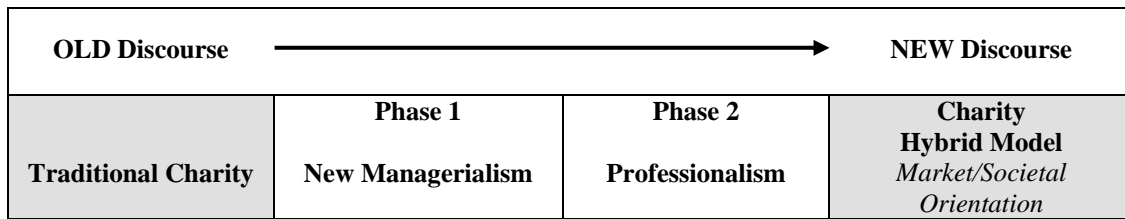


Figure 8.2a – Discourse Transformation Within Arana.

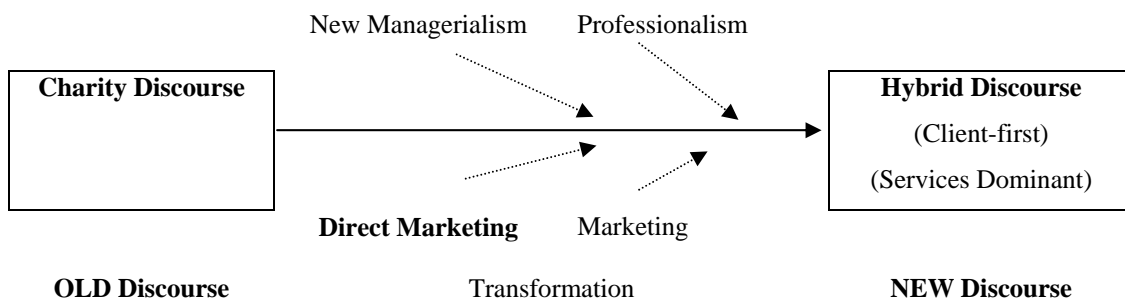


Figure 8.2b – Discourse Transformation Within Bukari.

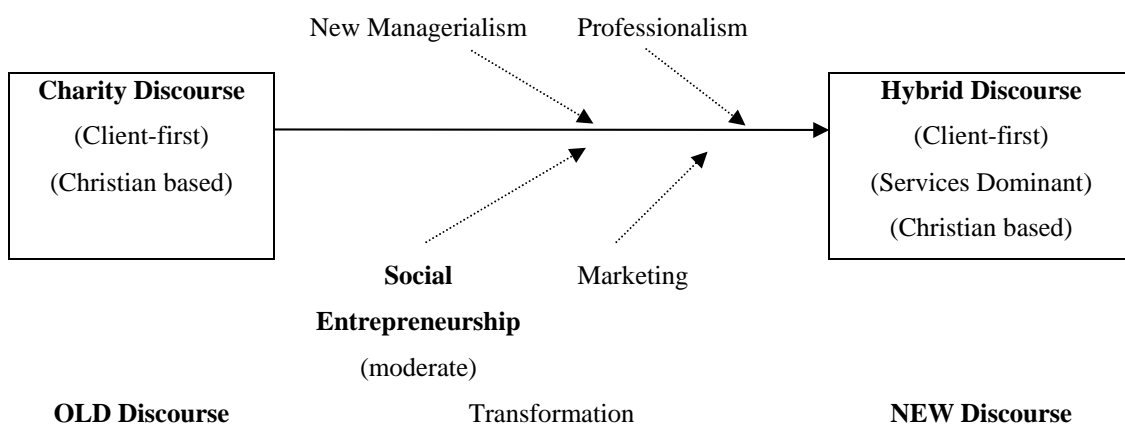


Figure 8.2c – Discourse Transformation Within Camira.

Figure 8.2 – Discourse Transformation Model Within Each Case.

The discourse transformations for all three organisations began with strong aspects of new managerialism which typically has a ‘concern for efficiency, cost-effectiveness and competition’ (Gewirtz & Ball 2000, p. 256) and involves management techniques drawn from for-profit organisations (Meyer 2002; Vickers & Kouzmin 2001) resulting in the transformation of charities into businesses. This managerial reform has been due to both the need to become more efficient and competitive and also due to increased government funding opportunities (Lyons 2009) that require rigid auditing which results in organisations adopting ‘managerialist, corporate ways of working’ (Keevers *et al.* 2008, p. 471). Introduction of new managerialism into charities could be regarded as vital to assist charities to introduce business activities essential for survival in the current competitive economic context.

Associated with the new managerialism was the subsequent increase in the level of professionalism that was introduced into all levels of each charity. This was a major discursive shift from the traditional charity discourse characterised by volunteers. Volunteers were replaced by paid professionals, paid non-professionals were trained to become more professional, and even professionals with non-business backgrounds were required to gain professional business skills. This was most evident within Arana (who utilised consultants to provide training) and Camira (who offered University based courses). Bukari, due to very tight financial constraints used in-house training offered by the CEO and also continued to rely on volunteers to a certain level. The discovery that each of the three examined charities has become more businesslike and professional reinforces the view of Keevers, Treleaven and Sykes (2008, p. 461) that various organisations have been transformed from ‘traditional benevolent charities into sophisticated corporate organisations’ within the Australian welfare space. Following recognition of the need to change, the first stage of change was introduction of new

managerialism, then professionalism across all functions. Only after these aspects have been introduced is management of the charity in a position to embed relevant aspects of market orientation in both revenue generation and client service delivery.

The mode of revenue generation differed between cases. Arana introduced a strong level of social entrepreneurship with extensive success in targeting government funding opportunities as well as formation of a for-profit division (e.g. lawn mowing) that competed in the open market and provided some independence in revenue raising. This for-profit division had the added benefit of creating employment for some of Arana's service recipient clients who were affected by the specific medical condition Arana aims to assist. Relationship marketing was a feature of developing appropriate relationships with key government contacts and services marketing was a feature of delivery of services to clients. This revenue generation focus contrasts markedly with Bukari that transformed their previously unsophisticated direct marketing activities into cutting-edge processes incorporating direct marketing techniques adopted from the for-profit sector. Camira utilised moderate levels of social entrepreneurship to gain government funding, plus maintained a range of traditional charity revenue generation activities including clothing recycling and church sourced donations. Camira also had the benefit of large ongoing financial reserves invested in the stock market to provide a regular source of funds. As the only church-based charity analysed, Camira also had the benefit of a solid parishioner base for donations as well.

It could be argued that there is no ideal revenue generation source for a charity. As part of organisational strategy, management of each individual charity identified current resources and made value judgements whether to maintain, develop or delete existing revenue generation activities. Arana chose to diversify into new areas (government funds plus a for-profit division), Bukari chose to build upon and improve

existing practices (direct marketing), whilst Camira chose a mix of maintaining existing sources (parishioner donations) as well as developing new areas (government funding and corporate donations). The ideal situation would be a diversified range of revenue sources, each with a strong level of continuity and certainty. This is difficult to achieve as government funding is based on successful tendering and the policies of the government of the day. Similarly, the success of direct marketing to sell lottery tickets, as well as the level of donations from both individuals and corporate organisations is greatly affected by overall economic conditions.

As will be discussed overleaf, aspects of marketing were introduced into the new discourses operating within each of the three charities. These aspects included components of services marketing and relationship marketing. This resulted in a client-first, services dominant approach that improved the already existing client first approach of Arana and Camira, added a client first approach to Bukari, and also improved the service delivery within all three organisations.

Summarising the resultant discourse transformation models, Arana was characterised by a cautious, social entrepreneurship model, with a downplaying of marketing, which it relabelled as communication. Bukari used a heavy emphasis on direct marketing and classical services marketing, overseen by a strong top-down managerial approach. This strong top-down managerial approach was partly due to the new discourse still being embedded, with management wanting to ensure they maintained control over the transformation. Camira utilised a strong services marketing approach underpinned with a religious ethos. Each organisation thus utilised differing levels of managerial control to introduce the change and chose differing aspects of marketing to introduce into their organisation. The specific aspects of marketing

introduced into each charity were partly dependent upon existing capabilities as well as the new areas required to operate the new discourse.

Whilst the discourse boundaries within each charity were displaced resulting in employees viewing the world from new perspectives, the notion of client-first was a legacy that was transferred to the new discourse not only to provide continuity and assist acceptance by existing employees of the new discourse, but it is the *raison d'être* – the foundation rock - for charity organisations. This was the element enabling successful ‘articulation’ (Hall 1996) from the old discourse to the new. Management of the charities articulated the old discourse and the new discourse. Respondents who were uneasy about the new discourse held on to the legacy of client-first in an effort to justify and accept the changes around them. The client-first aspect of employees was indeed advanced in the new discourses to a stronger services marketing aspect that gave clients even more service provision. Thus, it is argued that management of each charity utilised the client-first ethos of the employees as a key strategic resource in gaining acceptance of the new discourse. This legacy maintained continuity – a foundation rock - for a majority of employees. As indicated above, Bukari tended not to initially possess a strong client-first approach, but the development of this in the new discourse facilitated articulation into the new discourse for their employees. A religious ethos was another deliberately maintained legacy within Camira. There was no perceived conflict between the religious beliefs and the trend towards a more businesslike discourse within Camira.

In reference to Foucault’s (1999, pp. 56-57) four criteria for identifying discourse transformations, Table 8.1 overleaf provides a composite summary of the three case studies regarding the key aspects of the first criteria – ‘displacement of discourse boundaries’ within each case. As can be seen from the Table, social entrepreneurship relating to new revenue generation sources plus expanded services

Table 8.1 – Composite Summary of the Three Case Studies : Charity Discourse Component Changes - Displacement of Discourse Boundaries

ARANA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Introduction of social entrepreneurialism including introduction of new fund-raising activities (for-profit division) and targeting government grants • Introduction of expanded service activities • However, maintenance of client first approach 	<ul style="list-style-type: none"> • Progressive development of social entrepreneurialism • Progressive development of expanded service activities • Underlying continuance of client first approach • Development of professional tender writing for government tenders 	<ul style="list-style-type: none"> • Established social entrepreneurialism • Established expanded service activities • Underlying continuance of client first approach

BUKARI

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Continued but expanded emphasis on direct marketing for fundraising based on introduction of techniques from the for-profit arena. • Review and contraction of service provision for financial efficiency • Retention of (service recipient client) first ethos but within financial means, plus refocus towards donor client due to financial necessity 	<ul style="list-style-type: none"> • Introduction of revamped direct marketing capabilities • Introduction of services marketing principles • Retention of (service recipient client) first ethos but within financial means, plus strong focus towards donor client due to financial necessity 	<ul style="list-style-type: none"> • Established direct marketing activities based on concepts from for-profit arena • Retention of (service recipient client) first ethos but within financial means, plus strong focus towards donor client due to financial necessity

CAMIRA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal Orientation
<ul style="list-style-type: none"> • Introduction of social entrepreneurialism. • Maintenance of underlying client first and religious ethos 	<ul style="list-style-type: none"> • Progression of social entrepreneurialism including government tendering • Increased targeting of corporate donors • Maintenance of underlying client first and religious ethos 	<ul style="list-style-type: none"> • Embedding of social entrepreneurialism • Maintenance of underlying client first and religious ethos

were features of the expansion of the discourse boundaries for Arana. Emphasis on new direct marketing dominated the new Bukari discourse, and social entrepreneurship was the key change in boundaries of the Camira discourse. Despite these boundary movements, all three cases were grounded with a continuance of client-first from the legacy discourse of each charity. However, the poor financial situation within Bukari resulted in a refocus towards donor clients more so than service recipient clients due to the need to increase revenue to maintain survival. This was also due to Bukari's reliance on donors for revenue compared to the more diverse revenue sources utilised by both Arana and Camira.

8.2.1.5 Mixed views on marketing

Whilst a more market-oriented discourse has been introduced into all three charities, this has been done to a large extent without the employees having full knowledge of exactly what marketing and market orientation entails. The majority of respondents in all three charities perceived marketing to relate to the communication of promotional messages. This matches the findings of Andreasen and Kotler (2003, p. 45) who suggest non-profit organisations tend to define marketing 'primarily as promotion'. Only a small number of respondents had formal marketing training and were knowledgeable regarding the full range of marketing activities.

Some respondents considered that various charities had been very successful in gaining awareness and hence donations via promotion. There was, however, a perception that promotion was expensive and could on occasions be seen as stretching the truth and being too slick. These views were based on respondents' past experiences of seeing charity advertisements that portrayed unrealistic perspectives of

the charities. Another cause of wariness with advertising was the view that in the new discourse, any advertising should not depict service recipient clients as subjects of pity - which differs from the traditional charity discourse that depicts service recipient clients as subjects of pity and plays on people's emotions in a bid to solicit donations.

The perception that marketing was expensive related to the traditional notion that charities had difficulty in generating revenue and that, once generated, the money could be better utilised to employ more service providers, or provide more services, rather than allocated to a marketing budget. This was also the view of the CEO of Arana that suggests that even some top management had reservations on a full introduction of a marketing discourse and practices into their charity. Some respondents questioned the need to advertise, as it would simply result in an increased number of service recipient clients putting pressure on the already stretched resources. These views came from service providers, with the benefits of promotion to increase donations seemingly not to have been considered by them. Respondents in revenue-raising positions were more pro-marketing and perceived the benefits of marketing to include increased donations and development of relationships with government fund providers and corporates. Thus, managers of charities need to be aware of the various perceptions that their employees have regarding 'marketing' and that any advertising needs to be realistic and appropriate so as not to alienate employees.

8.2.1.6 Existence of the four key dimensions of market orientation

As indicated above, each charity introduced its own unique new discourse containing elements of market orientation. Table 8.2 overleaf indicates the perceived level of market orientation within each charity, both before and after the discourse

transformation. The results are based on an overall assessment by the researcher following analysis of each charity and included examination of the comments provided by each respondent within each charity. Examples of typical comments from respondents have been included in the Table to justify the assessments. The results indicate that Arana and Camira perceived themselves to have a high emphasis on the customer both before and after the transformation, whereas Bukari employees admitted that emphasis on customers was not initially high. Whilst emphasis on customer is a component of market orientation, it is also a characteristic of traditional charities and is reflected in the caring nature of charities.

The importance of information is however not a perceived strong aspect of traditional charity discourse so it was not surprising that an increased use of information was found within each charity following the transformation to a more market-oriented discourse. There was acknowledgement from all three charities that whilst they recognised the need to use information to make informed decisions, they had yet to do it well and were taking steps to improve. Interfunctional coordination was discovered to be distinctly poor within both Bukari and Camira prior to the discourse transformation, but had improved following the discourse transformation. This improvement was to a large extent due to the new managers within Bukari and Camira appreciating the need to directly involve all employees in the transformation and thus also indirectly benefited the 'interfunctional coordination' aspect of market orientation.

Table 8.2 – Perceived Level of Market Orientation.

Component of Market Orientation (Lafferty & Hult 2001)	Arana		Bukari		Camira	
	Pre Discourse Transformation	Post Discourse Transformation	Pre Discourse Transformation	Post Discourse Transformation	Pre Discourse Transformation	Post Discourse Transformation
Emphasis on customer	High e.g. ‘focus ... on needs of clients’ (AK61)	High e.g. ‘very client focussed’ (AK37)	Medium e.g. ‘opened offices ... without any real service plan’ (BC146)	High e.g. ‘that is why we are here’ (BE269)	High e.g. ‘we are here for the clients’ (CC336)	High e.g. ‘what we’re here for’ (CC246)
Importance of information	Medium e.g. ‘Probably not well’ AB200)	Medium e.g. ‘will take a more structured approach’ (AB201)	Low e.g. ‘wasn’t geared up to even capture data’ (BI150)	Medium e.g. ‘that is something that wasn’t here before’ (BD667)	Low e.g. ‘we are not very good at that’ (CJ265)	Medium e.g. ‘we are trying to get better’ (CJ266)
Interfunctional coordination	Medium e.g. some management communication	High e.g. ‘there is more communication’ (AO109)	Low e.g. ‘it has the typical silos’ (BI441)	High e.g. ‘there is a lot of communication now. There wasn’t before’ (BG265)	Low e.g. ‘silo mentality’ (CJ306)	Medium e.g. ‘it is improving’ (CK266)
Taking action	Medium e.g. progress towards formation of committees	High e.g. formation of committees	Medium e.g. no standard practices and procedures	High e.g. ‘we’ve got service models designed and developed now’ (BA450)	Medium e.g. increased investment in training	High e.g. ‘more businesslike processes’ (CO86)

N.B. In relation to ‘emphasis on customer’ most comments from respondents related to service recipient clients.

8.2.1.7 Towards a service-dominant logic

A common characteristic across all charities examined was the adjustment to the range of services offered to the service recipient clients. The well-planned discourse change of Arana resulted in small step regular changes to service delivery via progressive modification of existing services and the addition of new services. This contrasted with Bukari where, due to the poor financial situation, the new management made a conscious effort to examine and rationalise services (to service recipient clients) in a very short period of time. With an emphasis on achieving efficiency, any costly, non-essential services within Bukari were deleted and remaining services modified. Camira's new management not only rationalised services, but also introduced a new service delivery model based around a holistic approach whereby service recipient clients took more involvement and responsibility in the service delivery process. Similarly, Arana via their introduction of a for-profit division introduced service delivery that involved their service recipient clients.

Marketing is increasingly perceived to be fundamentally about services rather than goods (Vargo & Lusch 2004a; Vargo & Morgan 2005), with service defined as 'the application of specialized competences (skills and knowledge)' (Vargo & Lusch 2004b, p. 334). Thus, it is argued that a 'service-dominant-logic' now exists within marketing (Vargo & Lusch 2004a, 2008a). There is little doubt that the three charities provide services (to service recipient clients) based on the specialised skills and knowledge of the service providers. This specialisation has increased following the discourse transformations with the increasing use in professionalism to deliver a range of more specific services requiring highly trained and professional service providers. The most critical resources for a service provider are the 'intangible resources like human

knowledge and skills (competences)' (Vargo *et al.* 2006, p. 40), thus the employees within charities are the key to quality service delivery. Thus, there is a need for appropriate training of existing employees, or the need to recruit new, more professional employees. Although some goods are provided by the charities (e.g. food parcels, clothing, money), these tend to be only a component of an overall service.

Marketing is characterised by an exchange process and the service-dominant-logic containing ten foundational premises (Vargo & Lusch 2008a) is based on 'the application of competences for the benefit of another' as 'the fundamental basis of value creation through exchange' (Vargo & Akaka 2009, p. 32). One of the primary tenets of service-dominant-logic involves 'an understanding of value as a collaborative process between *providers* and *customers*' (Lusch *et al.* 2008, p. 5). Whilst the services provided by the charities are typically free of charge, it could be argued that the 'value' that service recipient clients give the service providers in exchange for these specialised skills and knowledge is the positive and satisfying feeling gained by the providers' after they assist their service recipient clients. As was consistently stated by service providers, they do not work in charities for high pay, but the reward (exchange) they receive is the satisfaction of seeing their service recipient clients' lives improve.

Not only is the client a co-creator of value in the exchange relationship, but they are also a co-creator of co-production (Lusch & Vargo 2006), in other words, clients are actually involved in production of the service delivery. This is particularly evident in Camira's new holistic model of service delivery whereby service recipient clients are no longer simply passive receivers of services, but now are more involved in, and have to take some responsibility for their long-term wellbeing based on guidance and direction from the charity employees. Thus, it is contended that the new discourse operating within Camira in particular contains strong characteristics of a service-dominant-logic.

A service-dominant-logic is less pronounced within Arana and Bukari. This is partly due to the nature of Arana and Bukari's service recipient clients who have medical conditions that may prevent them from being physically able to play a major active role in the service delivery. Many can only play passive roles.

Whilst this discussion regarding service-dominant-logic has concentrated on the traditional clients of charities who receive services, it can also relate to donor clients and other fund providers such as government. Transactions and exchange occur between the charity and donor client, as well as between the charity and government, with each party providing a service for the other. Donor clients provide money to the charity and in exchange receive the satisfaction of assisting the charity to help service recipient clients. Purchase of lottery tickets from charities is a direct transaction/exchange process. Provision of funds from government to charities to provide services to service recipient clients in effect results in charities playing an intermediary role in delivering services on behalf of the government. Thus, by providing services, charities are not only assisting their service recipient clients, but also assisting the government funders of the services.

Service-dominant-logic also implies use of relationship marketing (Vargo & Lusch 2008b); it is not possible to deliver a service without there being some form of relationship. Charities, in particular the individual service provider employees, form relationships with their service recipient clients. Charities also aim to develop an ongoing commercial relationship with donor clients and purchasers of lottery tickets and other saleable items. Likewise, management of charities tasked with tendering to government for funds aim to develop relationships with government officials both before and after obtaining funds. The relationships are aimed at enabling charities to better market their capabilities to government officials to win tenders, as well as gain

ongoing market intelligence for future tenders. Thus, charities need to gain appropriate relationship marketing skills, yet another component of professionalism characteristic of the new discourse.

8.2.1.8 Interdiscursive tension

Various levels of tension caused by the introduction of the discourse transformation arose within all three charities. This ultimately resulted in some employees choosing to leave each charity. However, minimal resignations occurred within Arana as the discourse change was introduced over a relatively longer time period than was the case within Bukari and Camira, thus enabling Arana employees to become familiar with the changes and therefore more likely to stay. This contrasts drastically with the very rapid discourse change within Bukari brought about by a new CEO and senior management in an effort to urgently improve the poor financial situation. Whilst employees on the whole recognised the need to change to survive, the rapid changes proved too much for a number of Bukari employees who ultimately left the organisation. Camira offers another perspective, whereby the new CEO and senior management gained legitimisation from employees by enabling them to have a role in developing the new strategic plan that was a fundamental component of the new discourse. Having a valued legacy from the old discourse was also strategic for management to introduce the transformation with minimal tension. Thus, key learnings are firstly: existing management of charities need to recognise the need to change, or be replaced by new management (as occurred in Bukari and Camira); secondly, management need to recognise the potential tension that a change in discourse may have on employees and thus take steps to minimise any tensions (by, for example, involving

employees in the strategic plan of the new discourse as occurred in Camira); and thirdly, management should maintain a level of continuity with the legacy discourse by articulating the new discourse with a component of value from the legacy discourse (i.e. common starting points). This component of value in all cases was the client-first approach, as well as the religious ethos for Camira.

8.2.2 The New Position and Role of the Speaking Subject

8.2.2.1 Towards professionalism

Professionalism refers to ‘the competence, or the correct demeanour, of those who are highly trained and disciplined’ (Chambers English Dictionary, 1990, p. 1166). Fournier (1999) suggests the discourse of professionalism can be used to embed what management considers to be appropriate work identities, conduct and practice. This was a key issue affecting employees in the new discourse across all three cases and supports Evetts (2003, p. 23) who suggests that ‘the discourse of professionalism is increasingly used’ in organisations and can be used by management ‘as a mechanism of occupational change and control’ (Evetts 2003, p. 32). The move from the legacy discourse characterised by non-professionals and volunteers to a more businesslike discourse in itself required increased professionalism. This requirement is compounded in both Arana and Camira, who rely to a large extent on government funds, where an increase in business process was required to meet subsequent government auditing to ensure the funds were utilised appropriately. Increased regulation coupled with introduction of key performance indicators is often justified by management as a need to professionalise an organisation (Evetts 2003, p. 23). Throughout the interviews, management of both

Arana and Camira highlighted that part of their increased use of business processes was in response to government auditing regulations.

Introduction of professionalism typically includes ‘change of the occupational role and work practices’ (Evetts 2003, p. 29) and transforming employees as professionals ‘involves the delineation of “appropriate work identities”’ (Fournier 1999, p. 290). This delineation change can have both positive and negative effects for charities. Management need to recognise the negative aspects (such as increased absenteeism and lacklustre work performance) and ensure they take appropriate actions to minimise the negative aspects. Professionalisation within an organisation can occur via two methods – increasing the skills of existing non-professional employees (professionalising the non-professionals), or by recruiting new employees who are already trained professionals. Management should firstly conduct a skills audit amongst existing employees to identify employees with skills and abilities considered appropriate for the new discourse and/or who can be trained. This will enable identification of key employees whom management should aim to keep, and to whom management should thus regard as a priority to ‘sell’ the new discourse. It appears that skills audits were not conducted in any of the three charities. Employees simply chose to either stay or leave, with management seemingly having little concern as to whether any of the employees who left had skills that would have been appropriate for the new discourse.

Existing untrained employees who lack the confidence to become more professional in their work practices may feel alienated and become disenchanted and exhibit avoidance behaviour. Management support for these employees is essential otherwise the employees may ultimately leave the organisation, often taking with them a wealth of experience and client goodwill. However, it needs to be recognised that the

long-term operations of a charity may be best served if some untrained employees leave rather than be trained to fulfil roles they may naturally be uneasy with. Camira management overcame the potential alienation of these untrained employees by offering numerous training opportunities enabling professionalising of the non-professionals. Arana and Bukari management appeared to provide less training opportunities. Bukari chose to professionalise the organisation simply by recruiting new employees. Thus, management of charities need to choose whether to professionalise their organisation via introduction of appropriate training of existing employees, or simply recruit new, professionally trained employees. This decision will be based on the skill set required by the organisation for the future.

Whilst introduction of a professional marketing and business discourse is likely to facilitate improved service delivery, a potential negative effect is that the resultant occupational changes and associated documentation requirements can be 'interpreted by workers as increased bureaucratisation' (Evetts 2003, p. 23) resulting in a 'form of occupational identity crisis which is often expressed as forms of discontent perceived by particular groups of workers' (Evetts 2003, p. 23). This 'discontent' is likely to occur within both existing non-professional and professional employees who are not already familiar with documentation characteristic of business discourse. This discontent may manifest as token completion of the documentation. Thus, even existing professionals may not actually be professionally trained in all aspects of the new discourse. This was particularly apparent at Bukari where existing medical professionals were uncomfortable with the move to business professionalism. They were already professional, but only in medical activities; they were untrained in the new business activities added into their new work practices. The result was some medical professionals leaving, whereas others stayed and become more comfortable with the

business professionalism required following somewhat informal training provided by the CEO.

The positive aspect of any move towards professionalism is that the ‘image’ of professionalism is appealing to existing professional workers as they are likely to receive more recognition for their work efforts. Thus, existing professionals in previously less professional workplaces such as traditional charities may feel more appreciated when the new managerialism and professionalism discourse is adopted by charities. Likewise, existing professionals from outside a specific charity (including from the for-profit sector) are more likely to join a charity that is moving towards professionalism rather than joining a traditional charity that has no plans to change.

8.2.2.2 New individual identities

People possess multifaceted identities, referred to by Davies and Harré (1990, p. 47) as ‘multiplicities of “self”’ which comprise multiple subject positions. The notions of self can shift (Wood & Kroger 2000) as employees (with personal and working lives) are exposed to, wrestle with, and come to grips with new experiences. Thus, the introduction of the discourse transformation in all three cases resulted in a need for employees to assess their self-identity as their required roles changed. In doing so, some employees considered they could not ‘shift’ as demanded by the new discourse and subsequently left their employment, whereas other employees embraced the change both readily and easily, or with assistance typically via training offered by management. For organisations to achieve success, the skills of the employees are critical (Pfeffer 1994). Thus, management actively encouraged and offered training. This training occurred via differing means in each case. In Arana, external consultants provided

short-course training. In Bukari, training tended to be rather ad hoc and provided internally, whereas Camira utilised somewhat formal external training via tertiary institutions. The differing training approaches are to an extent due to the differing financial resources available within each charity, but also reflect the level of management understanding regarding the need for training to assist the change management process. Existing untrained employees as well as existing non-business professional (typically medical or social work professionals) who experienced the discourse transformation tended to keep their 'caring, client-first' positioning but also added new components to their identity including the 'professional business' aspect as well as 'professional service delivery'. As stated by Jorgenson (2002, p. 376), employee 'identities are constituted through a variety of positionings'. Thus the identity of the employees in all three charities changed as they were inculcated into the new discourse and learnt new positions and developed 'multifaceted self-identifications' (Jorgenson 2002, p. 362).

Influenced by Davies and Harré (1990), Jorgenson (2002, p. 358) considers that, unlike the static concept of role (i.e. job position), subject positioning involves 'dynamic aspects of social encounters' in that individuals claim identities and take up positions within a discourse and then seeing the world from and speak 'from the vantage point of that position'. Whilst employees may not totally accept all aspects of the new organisational practices, they tend to adjust and reconcile the situation of potentially conflicting discourses by adopting multiple subject positions from various discourses (Davies & Harré 1990; Jorgenson 2002). To work in not-for-profit organisations, employees tend to have a strong need to feel for the cause - this is a fundamental value that has to be incorporated and accommodated within any charity discourse transformation. Thus, the underlying 'caring, client-first' aspect was utilised by

employees to accept the new practices and was used by management to enable articulation from the old to the new discourse. In other words, the fundamental values of the existing employees do not change.

8.2.2.3. A new organisational identity

Users of discourse can become involved in construction and development of their identity both as individuals and as members of various groups (Fairclough & Wodak 1997). Thus, the discursive practices within the charities resulted in employees not only changing and developing their individual identities, but also the composite organisational identity. Discursive practices tend to operate in tandem, with the majority of new practices not only affecting the individual identity of employees, but also affecting a composite change in an organisation's identity. For example, the introduction of uniforms within Arana not only affected individuals' identity and sense of self, but also assisted in conveying a new, overall professional image of the organisational identity to both employees as well as the outside world.

Coupled with the more businesslike approach by all three charities was a corresponding increase in 'physical evidence' by Arana who moved their head office into a new, purpose built building in keeping with the new professional image they wished to portray. Bukari did not make any change, basically due to financial issues, whilst Camira's head office was already in a multi-storey building in a central business district. The aim of all three organisations to change discourse and be perceived differently to traditional charities at an overall organisational level was due to managements' view that a more professional discourse was required to survive in the current environment and prosper into the future.

8.2.2.4. *Transformed client identities*

Whilst respondents insisted that the charitable ethos should remain in the new discourse, there has been a trend towards a more inclusive perspective of service recipient clients with a strong attempt to remove the 'pity' aspect. The traditional charity discourse draws upon notions of people needing help and being perceived as objects of pity, typically with the aim of soliciting donations by appealing to the social conscience of the community. The afflicted person is seen as an 'object of pity' (Brown R 1997, p. 168) with charitable giving often carrying an expectation from the donor client of gratitude from the beneficiary. This positions both the donor and the recipient of the service in specific subject positions with a large power differential in which the donor (benefactor) is always regarded as superior because without the donor, the recipient would not receive anything. For example, with specific respect to people with disabilities, in Australia, charity discourses have typically constructed disabled people as dependent on experts rather than independent and self-determining (Fulcher 1989).

A characteristic of the newly introduced discourse in all three charities was the aim of removing this negative aspect of the traditional charity discourse. Arana and Camira employees indicated a dislike for service recipient clients being portrayed as objects of pity in marketing materials. This is similar to the view expressed by Ziegler (1989, p. 8) that '[d]evalued people will be better seen as individuals if they are not removed from the rest of the community and not grouped with other devalued people'. Camira, in particular, introduced a totally new service delivery model based around a holistic approach that aimed to change the subject positions of service recipient clients and actually empowered them to ensure appropriate long-term outcomes. This was achieved by removing the 'hand-out' mentality that service recipient clients were used

to, and by teaching them new skills to take responsibility for their personal circumstances rather than continuation of an ongoing reliance on charities for assistance.

In keeping with the new positioning of service recipient clients in a holistic service model and taking some responsibility for their future, is the concept of an 'inclusive world'. Arana introduced a new purpose statement - 'creating an inclusive world'. Similarly, Camira focuses on developing a 'socially inclusive society' and working with service recipient clients to 'find solutions that meet immediate needs and address the long-term underlying causes of the issues they face' (Camira 2008a, pp. 4-5). Thus, both Arana and Camira are focussed on creating the same new identity for their service recipient clients. This perspective of clients is in keeping with the service-dominant logic of Vargo and Lusch (2004a; 2006; 2008a; 2008b) in which clients are a key contributor in any service transaction although, as indicated earlier, some clients may not be capable of active involvement in service delivery due to their specific medical conditions.

8.2.2.5 Tension with new subject positions

Implementation of change typically results in employee concerns (Dawson 2003). Whilst all employees will likely have some fear of change in general, the respondents in all three charities indicated that there was a range of levels of 'resistance' to the discourse change. Some employees had philosophical issues with the change to a more businesslike focus and some felt unable to operate in a more organised and formal manner with increased reporting and accountability. There were also issues with the more quantitative performance measurement systems introduced. These issues resulted

in some employees in all the charities resigning. Those who stayed but were still apprehensive typically became 'sold' on the new discourse whilst younger employees typically embraced the new changes from the start. It is significant that both Bukari and Camira employed new CEO's and new senior management to introduce the discourse transformation. Arana, in contrast, was the only charity that possessed existing management who considered a need to change. The previous senior management of both Bukari and Camira either did not see the need to change and/or were inappropriately skilled to make changes.

8.2.2.6 Competition from other charities – varying perspectives

Competition is typical of most for-profit marketplaces in Australia and is now an issue within the new charity discourses needing consideration. Perceptions of competition in the charity sector varied with respondents' employment positions. Respondents in service provision positions typically considered that they did not compete against other charities as they were all serving a common good.

Respondents in revenue raising positions did, however, regard other organisations including other charities as competitors. Competition related to sales of lottery tickets, canvassing for donations from individuals and corporates as well as bidding for government contracts. In a bid to gain value for money, the Australian Government has established a competitive tendering market for funds to provide services. Consequently, this has added complexity to the operating discourse, with other charities now seen as direct competitors for funding and has resulted in 'a competitive model in which non-profits are encouraged to imitate the practice of for-profit enterprises' (Maddison *et al.* 2004, p. iix) resulting in 'commodification of services,

privatisation of community services, development of quasi markets, and a culture of competitive contracting' (Keevers *et al.* 2008, p. 463). Thus, there is strong competition for winning of government tenders and charities have needed to become very businesslike to be successful.

8.2.2.7 Summary of the new position & role of the speaking subject

As discussed above, employees within each of the three charities gained new positions and roles within the new discourse. Table 8.3 overleaf contains a composite summary of the three case studies regarding the key aspects of the new position and role of the speaking subject across all three cases. As can be noted from the Arana information, some tension commenced amongst employees when the new discourse commenced. Major changes to employees subject positions occurred specifically within the professionalism phase of the transformation particularly in relation to employees' daily job activities. These changes settled once the new market/societal orientation discourse had become relatively embedded. These issues were similar within both Bukari and Camira.

Table 8.3 – Composite Summary of the Three Case Studies : Charity Discourse Component Changes - The New Position & Role of the Speaking Subject

ARANA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Commencement of some tension due to initiation of change in service delivery • However, a general overall acceptance of the need to change to meet the changing environment 	<ul style="list-style-type: none"> • More formal and professional roles and required daily activities • Increased emphasis on more formal and structured service provision • Assisted by improved information gathering • Introduction of some practices from for-profits • Increased use of KPI's & reporting • New organisational identity, assisted by new offices and introduction of employee uniforms • Perception of change from 'charity' to a 'support agency' • Tension due to continued change – mainly in service provision areas • Mixed acceptance of new marketing techniques • Greater interfunctional co-ordination • Training to assist change in roles • Increased competitiveness against other charities for government funds • Minor employee resignations, replaced by new employees more comfortable with the new roles being introduced 	<ul style="list-style-type: none"> • Relationship marketing to assist government tenders • Rigid reporting required to meet government audits • Embedding of new service delivery processes • Embedding of the four key dimensions of market orientation

continued overleaf

Table 8.3 (Continued) – Composite Summary of the Three Case Studies : Charity Discourse Component Changes - The New Position & Role of the Speaking Subject BUKARI

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Commencement of some tension due to initiation of change in overall organisation direction • Introduction of formalisation and reporting of roles 	<ul style="list-style-type: none"> • More formal and professional roles and required daily activities underpinned by introduction of standard practices and procedures • Increased accountability • Increased emphasis on more formal and structured service provision • Assisted by improved information gathering • Introduction of some practices from for-profits • Increased communication amongst departments • Introduction of four key dimensions of market orientation • Some tension due to continued change but lessening due to new service provision providing improved service for service recipient clients and overall acceptance and recognition of need to change to survive financially • Very professional direct marketing capability introduced requiring change in positions and roles of fundraising staff • New trading name, revised logo consistent with change of organisation 	<ul style="list-style-type: none"> • Embedding of new service delivery processes • Progressive use of four key dimensions of market orientation

continued overleaf

Table 8.3 (Continued) – Composite Summary of the Three Case Studies : Charity Discourse Component Changes - The New Position & Role of the Speaking Subject CAMIRA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal Orientation
<ul style="list-style-type: none"> • Development of some tension due to initiation of change • Broad acceptance of need for change 	<ul style="list-style-type: none"> • More formal professional roles and required daily activities • Increased emphasis on more formal and structured service provision • Assisted by improved information gathering • Use of relationship marketing to develop corporate and government links • Holistic service delivery • Introduction of style guide to direct consistent new organisational identity • Increased use of four key dimensions of market orientation • Formation of ‘professional practice teams’ and ‘leadership forums’ across organisation • Improved cross-functional communication • Introduction of formal training via University • Introduction of some practices from for-profits • Increased use of KPI’s • Some tension due to continued change 	<ul style="list-style-type: none"> • Embedded use of four key dimensions of market orientation • Embedding of new service delivery processes and formal reporting

8.2.3 The New Mode of Functioning of Language

Discourse both enables and constrains what can and can't be said (Barad 2007) and also structures understanding and 'governs the paths of action which appear to be open to us' (Levitas 2005, p. 3). Thus, in introducing a new discourse into the charities, the senior management in all three charities utilised language to enact the new discourse as well as constrain the limits of the new discourse.

The effects of marketisation including 'pervasive restructuring of institutional orders of discourse' and rewordings 'give rise to resistance ... over the structuring of orders of discourse, and to dilemmas for text producers and interpreters trying to work out ways of accommodating, containing or subverting colonization' (Fairclough 1992, p. 117). Change can only be made 'by changing the rules and customs active people follow' (Harré 2002, p. 100). Similarly, via what van Dijk (1993, p. 280) refers to as 'discursive management of the public mind', individuals can use discourse as a resource in an aim to change what is thinkable. Introduction of the new hybrid discourses (e.g. new managerialism, marketing) within each organisation was characterised by introduction of a new language – the language of commerce/business.

Table 8.4 overleaf contains a composite summary of the three case studies regarding the key aspects of the new mode of functioning of language within each charity. As can be seen from the Table, business terms were introduced in the first stage of the discourse transformation into the everyday language of all three charities. The language was however introduced more quickly into Bukari, in keeping with the overall more rapid introduction of the new discourse within Bukari relative to the other two charities. As the discourse transformation progressed, Arana and Camira employees became familiar with the new language but issues arose within Bukari due to the rapid introduction. This resulted in the CEO of Bukari having to educate the employees

regarding the new words being used. Eventually, the new language became embedded in the new discourse. The new language utilised within all three charities was similar – the language of business. The new language was introduced into all three organisations in a similar manner – via both printed/electronic documents as well as in verbal communications.

Table 8.4 – Composite Summary of the Three Case Studies :
Charity Discourse Component Changes - The New Mode of Functioning of Language

ARANA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Introduction of business terms 	<ul style="list-style-type: none"> • New business terms become more common and familiar amongst employees 	<ul style="list-style-type: none"> • New business language now normal
Typical words now utilised by a senior manager included ‘...our client group ... service delivery ... management meetings ... business and regional development, strategic planning ... economies of scale ... strategic direction ... best practice ... strategic planning process’ (AB32-592).		

BUKARI

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Rapid introduction of business terms 	<ul style="list-style-type: none"> • Issues with rapid introduction of new language requiring employee training regarding new language 	<ul style="list-style-type: none"> • New business language now more familiar amongst employees
The new language was regarded by the CEO as the language of marketing/business and: ‘we were talking a different language’. A long-serving employee indicated that - ‘... it took me about eight months ... to actually start getting the gist of where the new people were coming from’ (BC192).		

CAMIRA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Introduction of business terms 	<ul style="list-style-type: none"> • New business terms become more common and familiar amongst employees 	<ul style="list-style-type: none"> • New business language now normal
Camira’s head office ‘use a lot of corporate language’ (CB333).		

The new language was clearly identifiable in the everyday talk of the respondents and in various printed artefacts including annual reports, corporate plans, and brochures, as well as in both staff and client magazines. For example, Camira have a specific strategic plan document (also available publicly on their website) that contains businesslike language such as ‘strategic directions ... viable and sustainable ...

key performance indicators ... continuous improvement ... best practice and innovation' (Camira 2007a, pp. 6-8).

The new language was highlighted by virtually all respondents in all three charities as a key change within their organisation. Generation of styles guides and their subsequent use by all three charities as guiding principles resulted in 'embedding' (Phillips *et al.* 2004, p. 643) of the text into the new discourse. Similarly, standard practices and procedures were introduced in all three charities to formalise the required behaviour of employees during the course of their daily service delivery. 'Embedding refers to the extent to which texts are adopted and incorporated ... to become part of standardized, categorized, generalised meanings' (Phillips *et al.* 2004, p. 643). Thus, management in all three charities introduced texts that over time become 'a fact – just part of reality in that organizational world' (Taylor *et al.* 1996, p. 27). These managerial actions to gain a change in discourse and develop uniformity are what Foucault (1975) refers to as normalisation – the process by which ideas and actions become accepted as normal and involve an element of power and control by management.

To assist the normalisation process, management need to ensure that employees understand the new meaning of the new language. This was specifically apparent within Bukari where the introduction of the new language was so sudden that numerous employees became confused regarding the new discourse due to simply not understanding the new language. From a managerial perspective, this suggests that management need to ensure employees either already understand the new language or are given training in the meaning of the new language.

The new language of commerce/business was utilised hand-in-hand with other discourse changes, particularly the change in subject positions and roles to embed the discourse transformations. For example, the new language coincided with the expected

new level of professionalism required of employees. Thus, the new language in combination with the new subject positions enabled employees to view the world in line with managements' aims.

8.2.4 Circulation of Discourse

Restructuring of organisations is discourse driven (Fairclough 2002) and a managerial discourse typically involves a focus on management, performance appraisal, efficiency, cost cutting and output targets (Verspaandonk 2001). Introduction of new managerialism into charities in Australia has been a trend in recent years, partly driven by the increase in availability of government funding and the subsequent reporting and accountability requirements. Introduction of new managerialism was the first phase in all charities and was the controlling feature that enabled the discourse transformation to be successfully implemented. In other words, each organisation gained strong management capable of introducing a more businesslike discourse. Arana's existing CEO was knowledgeable in such processes and hence able to introduce new managerialism. This contrasts with the previous management of both Bukari and Camira who were not familiar with new managerialism. New managers were employed within these organisations who were more familiar with new managerialism.

Follett (1941) suggested that management is the 'art of getting things done through people' and can thus be regarded as a discursive activity in that the 'actions of managers are enacted, given meaning and constituted through discursive activity' (Oswick *et al.* 1997, p. 11) with discursive practices lying at the core of any change process (Buzzanell 1995). These discursive activities involve not just verbal contact with employees, but printed text in annual reports, memos and other written documents utilised within the organisation. Discourse transformations involve 'separating out from

among all the statements which are possible those that will be acceptable' (Foucault 1980, p. 197) thus, if management is not happy with the existing discourse, they need to examine options either themselves or in conjunction with other stakeholders including employees.

Table 8.5 overleaf contains a composite summary of the three case studies regarding the key aspects of the circulation of discourse within all three charities. Management of all three case organisations utilised differing practices to introduce change and these discursive practices were conducted either directly by management, or delegated to other employees. Whilst any transformation requires the 'participation ... of both organisations and their employees' (Keevers *et al.* 2008, p. 461), during transformations there is often a 'paradoxical relationship of simultaneous empowerment and manipulation' (Hodgson 2001, p. 120). This was apparent particularly in Arana and Camira. Arana management introduced various committees that were empowered to introduce the discourse transformation, but at the same time were overseen by senior management. Similarly, Camira management utilised strategic planning days to empower all employees to provide their input but under the manipulation of management who controlled the process. On the other hand, Bukari management, due to the relatively small overall size of Bukari, chose to introduce the new discourse directly via the CEO's legitimated power with little empowerment of employees.

Whilst various employees left Bukari, even fewer employees left Camira. This can be partially attributed to the manner in which Camira management gained buy-in of employees for the discourse change by actually involving all employees in the strategic planning of the new discourse, plus the pro-active offering of training. Arana management gained commitment from those who were chosen to sit on the various committees, but risked alienation of those not on committees. Bukari only involved

Table 8.5 – Composite Summary of the Three Case Studies : Charity Discourse Component Changes - Circulation of Discourse

ARANA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • Long-term CEO introduced more formal management structure introduced • Introduction of new discourse very gradual and relatively subtle. 	<ul style="list-style-type: none"> • Formation of committees to assist employee buy-in 	<ul style="list-style-type: none"> • Established however ongoing resource issues of service provision versus marketing

BUKARI

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • New CEO (with previous charity organisational change experience) employed • New Senior management employed (all hand-picked by CEO and possessing previous charity organisational change experience) • Rapid introduction (due to poor financial position of Bukari) 	<ul style="list-style-type: none"> • Hands-on by CEO & Senior Management (partly due to relatively small size of the organisation and majority of employees being located in one building) • Regular communication via intranet and employees meetings 	<ul style="list-style-type: none"> • Still being embedded by CEO & Senior Management with regular communication via intranet and employees meetings

CAMIRA

Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Market/Societal orientation
<ul style="list-style-type: none"> • New CEO (from for-profit sector) employed • New Senior management employed • Underlying Christian based ethos 	<ul style="list-style-type: none"> • Employee attendance at strategic planning days to gain buy-in • Underlying Christian based ethos 	<ul style="list-style-type: none"> • Across-organisational committees for uniformity • Underlying Christian based ethos

senior management in the transformation and thus did not have immediate buy-in from other employees. Thus, in terms of stakeholder involvement and empowerment in the discourse transformation, Bukari had the least employee input and greater managerial imposition of change, whereas Camira had greatest employee input and least managerial imposition. Therefore, management of any charity contemplating a discourse change would be well advised to ensure involvement of employees in the strategic planning process phase of the discourse training.

Introduction and circulation of a new discourse does not simply occur by itself, it needs to be driven and have appropriate supporting processes to translate the discourse into daily activity. As discussed in this section, management of each charity utilised differing processes to circulate the discourse – management of Arana predominately used newly formed committees to develop the new procedures to be used within the charity. Bukari used a somewhat autocratic top-down management approach, and Camira utilised strategic planning days to gain buy-in, followed by formation of across-organisational committees to develop uniformity of the new activities and processes.

Whilst the new discourses have now been typically accepted and acknowledged as beneficial by employees, there are underlying tensions remaining due to the fine line between attending to service recipient client needs versus long-term financial sustainability, issues relating to requirements from government funders for rigid quantitative reporting and accountability, and the underlying long entrenched ‘very different values system [of charities] to the commercial world’ (Arana 2008, p. 6). These underlying tensions are likely to remain for the foreseeable future and result in ongoing discourse adjustments. These tensions will be exacerbated for charities that rely on government funding where policies are resulting in the need for charities

to 'imitate the practice of for-profit enterprises' (Maddison *et al.* 2004, p. iix) if they are to survive and prosper. Thus, management of the charities need to recognise that discourse changes are never stable and will have underlying tensions that need to be monitored regularly and enacted upon if appropriate to ensure, as much as possible, the stability of the desired discourse.

8.3 Chapter Summary

Examination of the discourse transformations within the three cases has identified that the charities need to progress through two phases (introduction of new managerialism and professionalism) prior to ultimately becoming a modern, more market/societal oriented charity. The discourse transformations have been analysed using Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations.

This examination has shown a mixture of similarities and differences between the three charities. Similarities across all three cases related mainly to 'the new position and role of the speaking subject' as well as 'the new mode of functioning of language'. Employees within all charities were oriented towards a more professional and formal mode of operation with the language of business introduced and becoming commonplace. Key differences related to 'displacement of discourse boundaries' with management of both Arana and Camira moving to a social entrepreneurship approach whilst Bukari concentrated upon a direct marketing approach. The other key difference related to 'circulation of discourse'. Arana utilised committees, Camira similarly utilised across organisational teams, whilst Bukari management preferred a more autocratic top-down approach. The findings within this chapter set the scene to

enable a discussion and development of implications that are addressed in the following chapter.

CHAPTER NINE : DISCUSSION AND IMPLICATIONS

9.1 Chapter Outline

In keeping with guidance from Wood and Kroger (2000, p. 180), this final chapter summarises the ‘claims’ determined from the research and includes a consideration of their implications. The cross-case comparison in the previous chapter that mapped the discourse change within the three case organisations and analysed the similarities and differences between the cases has enabled the development in this chapter of an overview of the findings within the cases leading to a conceptual best practice framework for the management of change within charities as managers try to improve organisational performance. The work in this thesis is original in that it adopts a unique theoretical perspective - a discourse perspective to offer richer insights into the change within the organisations as seen through the eyes of the employees.

Following analysis (in Chapters 5-8) of the details of the transformation findings within the three cases, Section 9.2 thus presents an overview of the transformation findings within the cases leading to the subsequent development of a conceptual best practice framework in Section 9.3 for the management of change and provides guidance for how management of charities can introduce change to improve performance. Section 9.4 then details the contributions to knowledge of the study, indicates how the research fills gaps in existing knowledge regarding market orientation literature and not-for-profit marketing literature, and examines the manner

in which an organisation changes as market orientation is introduced. Following this, Section 9.5 discusses the implications of the findings for managers and how they can be guided to implement a marketing discourse successfully (via the best practice framework). Section 9.6 assesses possible limitations of the research which, in turn, informs Section 9.7 which offers suggestions regarding directions of future research such as examination of a larger range of charities in other geographic locations including overseas. Section 9.8 offers a thesis summary and conclusion.

An outline of the chapter is contained in Figure 9.1 below.

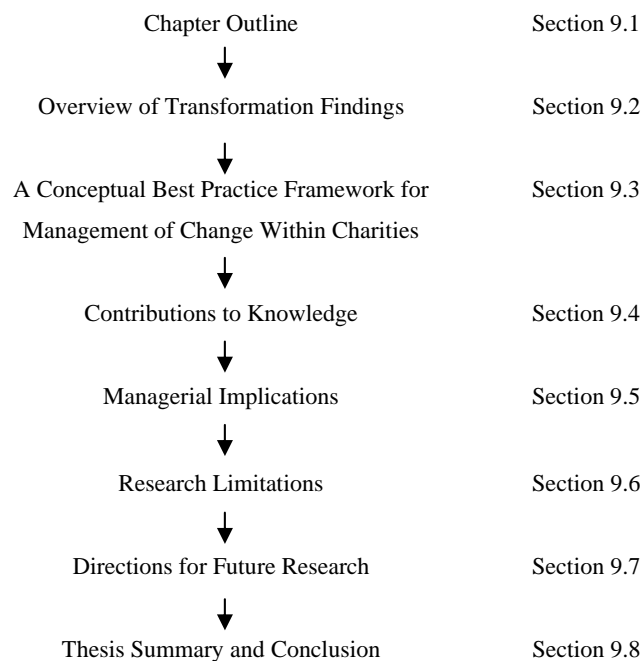


Figure 9.1 - Outline of Chapter 9.

9.2 Overview of Transformation Findings

As discussed in Chapter 8, a key finding within each of the three cases was that each charity progressed through a ‘new managerialism’ phase and a

‘professionalism’ phase prior to reaching a new discourse characterised by market/societal orientation. Based on the overall findings within this research, and with the finding of a need to move through new managerialism and professionalism phases, Table 9.1 overleaf has been developed. The ‘characteristics’ column on the left hand side of the Table is based on various antecedents and other aspects of market/societal orientation (Duque-Zuluaga & Schneider 2008; Gonzalez *et al.* 2002; Jaworski & Kohli 1993; Lafferty & Hult 2001; Sargeant *et al.* 2002) as well as various relevant characteristics identified during the fieldwork. The Table indicates the changes within each of these characteristics as charities move from a traditional discourse, through the new managerialism and professionalism phases to a new market-oriented discourse.

The key issues to note are the changes in most characteristics of the charity as the organisation moves through the new managerialism and professionalism phases towards becoming an updated charity. Very few characteristics of the organisation remain stable. Typically, only the employee commitment to high service recipient client focus remains unchanged, and is utilised by management as a key characteristic – a foundation rock – from the legacy discourse to gain legitimisation of the new discourse. It is interesting to note that whilst Jaworski and Kohli (1993, p. 55) consider that, in a for-profit organisation, employee ‘organisational commitment’ and ‘esprit de corps’ are a consequence of market orientation, my research indicates that in a not-for-profit charity setting, employee commitment is actually an antecedent for market/societal orientation rather than a consequence and that a transformation to a market/societal oriented organisation will not occur unless employees have aspects of the legacy discourse to guide their commitment and esprit de corps. The Table is discussed in detail in the sections below.

Table 9.1 – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
CHARACTERISTICS				
Organisation Mission (values and beliefs) and Strategy				
<ul style="list-style-type: none">• <i>Client focus</i><ul style="list-style-type: none">○ <i>Service recipient clients</i>○ <i>Donor clients</i>	High service recipient client focus. Service recipient client often portrayed as subject of pity. Important but secondary to service recipient clients	High service recipient client focus (maintenance of traditional charity ethos). Reduced portrayal as subject of pity. Increased importance but typically regarded as secondary to service recipient clients	High service recipient client focus (maintenance of traditional charity ethos). Service recipient client portrayed as valued member of society. Increased focus if regarded as key revenue source	
<ul style="list-style-type: none">• <i>Competitive focus</i><ul style="list-style-type: none">○ Organisational size	Other charities not viewed as competitors. Various but often small.	Introduction of some collaboration with other charities for service delivery, but also commencement of competition for government funds and donor clients. Increased efficiency to ensure viability occasionally resulting in short-term contraction, but typically leading to longer-term growth.	Increasing collaboration for service delivery, but competitive for government funds and donor clients. Growth regarded as beneficial to achieve economies of scale to improve performance. Growth perceived as essential for long-term survival.	
<ul style="list-style-type: none">• <i>Stakeholder relationships</i>	Minimal other than with service recipient clients.	Identification of key stakeholders, initiation of relationship development.	Formal relationship development and maintenance strategy.	
<ul style="list-style-type: none">• <i>Interface with external stakeholders</i><ul style="list-style-type: none">○ Funding bodies○ Publics○ Service recipient clients○ Donor clients	Nil funding bodies. Low. As required, reactive provision of basic service. Low contact, reactive.	Increasing development of government funds. Increasing as needed, to gain new donor clients. Modification of service delivery involving more active involvement of service recipient client. Increasingly proactive.	High use of government funds. High, as needed, to gain new donor clients. Holistic/customised service approach with expected involvement of service recipient client in service provision. Increasing frequency of contact, proactive.	

continued overleaf

Table 9.1 (continued) – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
Leadership				
• Board of Directors	Volunteers, mix of experience, not always with appropriate business qualifications, well meaning.	Targeted invitations to join. Voluntary. Increasing proportion of business professionals on Board.		High proportion of business professionals.
– Managerial interventions of Board	Typically minimal intervention must identify and recognise the need to change and take appropriate action to initiate change.	Ongoing and increasingly more professional monitoring of operations.		Ongoing professional monitoring of operations.
○ Emphasis	Day to day operations.	Initially short-term change management and improved organizational efficiency, progressively leading to long-term strategy development.		Long-term strategy.
○ Risk aversion	High aversion to risk.	Accept calculated risk. Increased level of entrepreneurialism to assist achievement of organisational goals.		Appropriate calculated risk to achieve organisational objectives.

continued overleaf

Table 9.1 (continued) – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
<ul style="list-style-type: none"> Top Management (CEO) 	<p>Well meaning but often with minimal business knowledge and experience. Should recognise the need to change, but typically has no skills to conduct change.</p>	<p>Experienced business professional often from for-profit sector.</p>	<p>Experienced business professional generally from for-profit sector.</p>	
<p>– Managerial interventions of CEO</p>	<p>Maintenance of status quo, but needs to initiate change.</p>	<p>High involvement in leading change –</p> <ul style="list-style-type: none"> • change management skills • skills/capability audit • leveraging existing capabilities • development of formalised strategy • gain buy-in from all organisation • introduce new language • increased staff training • increased internal marketing • change in organisational image/identity • new managerial job titles 	<p>Reduced involvement following embedding change in discourse. Ongoing overview of operations. Delegation to middle management.</p>	

Top Management continued overleaf

Table 9.1 (continued) – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model Market/Societal Orientation
<ul style="list-style-type: none">○ Emphasis○ Risk aversion <p>• <i>Middle Management</i></p> <p>– Managerial interventions of Middle Management</p> <ul style="list-style-type: none">○ Emphasis○ Risk aversion	Day-to-day operations with little long-term perspective. Revenue generation via donations & raffles. Minimal use of employee training.	Increased organizational efficiency and long-term strategic perspective. Examination of existing services, leading to more targeted services and broader range. Identification of additional revenue sources. Increased use of staff training to ensure appropriate level of skills	Increased organizational efficiency and long-term strategic perspective. Diverse range of highly specific and appropriate services. Diversification of revenue sources including increased government funding and increased social entrepreneurship including establishment of for-profit activities. Ongoing staff training as appropriate to ensure appropriate employee skill levels.	
	High aversion to risk.	Accept calculated level of risk. Introduction of entrepreneurialism.	Calculated level of risk. Entrepreneurialism to assist achievement of organisational goals.	
	Well meaning but often with minimal business knowledge and experience.	Greater roles for some experienced internal service employees, but mainly new business professionals often from for-profit sector.	Greater roles for some experienced internal service employees, but mainly new business professionals often from for-profit sector.	
	As requested by CEO.	As requested by CEO with increasing collaboration and determination of strategy.	As requested by CEO but with significant ongoing consultation and input into organisational strategic goals and tactics.	
	Reactive day-to-day operations with minor (if any) KPI's. Minimal use of promotion.	Day-to-day pro-active operations based upon embedding change and increased organizational efficiency. Increased use of promotion.	Organisational efficiency achieved enabling day-to-day pro-active monitoring of operations and increased involvement in medium and long-term strategy. Ongoing increase in use of promotion-personal selling, advertising, publicity, public relations.	
High aversion to risk.	Increasing opportunity for risk-taking to achieve organisational objectives.	Management permission for calculated risk to achieve organisational goals and objectives.		

continued overleaf

Table 9.1 (continued) – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
Employees				
<ul style="list-style-type: none">• Service providers<ul style="list-style-type: none">– Organisational commitment– Identity– Esprit de corps○ perception of marketing	<p>Regular high commitment from paid employees, but irregular hours of volunteers causes staffing problems.</p> <p>Typically untrained.</p> <p>Moderate to high.</p> <p>Perceived as ‘advertising’ and not needed</p>	<p>Commitment questioned by some employees as organisational change occurs (change of identities).</p> <p>Management reinforces legacy discourse of client-first ethos but some untrained employees may leave if unable to accept change of job requirements.</p> <p>Increased professionalism and accountability.</p> <p>Unsettled. Some uncertainty of organisational direction. Some differing perspective relative to fundraisers.</p> <p>Perceived as ‘promotion/advertising’ and not really needed.</p>	<p>High commitment to new discourse.</p> <p>Professional with high accountability.</p> <p>High – embracement of new discourse.</p> <p>Increasingly perceived as “7P’s” but question the need.</p>	
<ul style="list-style-type: none">• Fundraisers<ul style="list-style-type: none">– Organisational commitment– Identity– Esprit de corps○ perception of marketing	<p>Regular high commitment from paid employees, but irregular hours of volunteers causes staffing problems.</p> <p>Typically untrained.</p> <p>Moderate to high.</p> <p>Perceived as ‘advertising’</p>	<p>Generally readily accept change as leads to increased resources to raise funds.</p> <p>Increased professionalism and accountability.</p> <p>Typically accept and embrace change early. Some differing perspective relative to service providers.</p> <p>Perceived as ‘promotion/advertising’ and useful.</p>	<p>High commitment to new discourse.</p> <p>Professional with high accountability.</p> <p>High – embracement of new discourse.</p> <p>Perceived as “7P’s” and highly valuable for organisation.</p>	

continued overleaf

Table 9.1 (continued) – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
Organisational Structure				
<ul style="list-style-type: none">• Organisational Systems<ul style="list-style-type: none">– Formalisation– Centralization<ul style="list-style-type: none">○ departmentalisation– Rewards<ul style="list-style-type: none">○ intrinsic / “raison d’etre”○ financial○ respect– Accountability<ul style="list-style-type: none">○ Personal○ Organisational	<p>Low level of formalisation, somewhat casual due to high reliance on volunteers.</p> <p>Moderate level of centralisation.</p> <p>Often ad hoc structure.</p> <p>High.</p> <p>Low salaries, often volunteers.</p> <p>Moderate.</p> <p>Low, minimal KPI’s.</p> <p>Low, minimal KPI’s.</p>	<p>Increased management emphasis on formalisation resulting in development of standard practices and procedures.</p> <p>Introduction of KPI’s.</p> <p>Initial high level of centralisation to oversee and control the discourse transformation followed by increased empowerment of departments.</p> <p>Increased departmentatisation of dedicated activities but accompanied by increased inter-department communication.</p> <p>High.</p> <p>Increasing salaries based on increased professionalism.</p> <p>Increasing respect due to increased level of expertise required.</p> <p>Increased personal accountability due to professionalisation of job positions.</p> <p>Increased use of government funds requires increased accountability. Increased public scrutiny of charity expenditure.</p>	<p>High level of formalisation to ensure service quality and ease of reporting for government audits. Performance measurement based on KPI’s.</p> <p>Typically de-centralised to cater to localised service recipient client needs and wants, but overseen by centralised top management to ensure co-ordinated organisation.</p> <p>Formalised specialist departments with strong inter-department communications.</p> <p>High.</p> <p>Moderate (but typically lower than for-profit sector).</p> <p>High respect due to predominantly professional employees.</p> <p>High, based on personal KPI’s.</p> <p>High, based on audits by government fund providers and high level of public pressure to minimise administrative expenses.</p>	

Organisational Structure Continued Overleaf

Table 9.1 (continued) – Overview of Transformation Findings Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
Organisational Structure				
<ul style="list-style-type: none"> • <i>Interdepartmental Dynamics</i> <ul style="list-style-type: none"> ○ Conflict ○ Connectedness 	<p>Low conflict.</p> <p>Low level of connectedness, 'silo mentality', 'thought worlds'.</p>	<p>Potential conflict as discourse transformation occurs due to uncertainty.</p> <p>Proactive managerial action to improve connectedness. Increased internal communications.</p>	<p>Low conflict.</p> <p>High level of connectedness via ongoing communications and knowledge of role of each department. Integrated internal communications. Leadership forums. Cross-functional teams. Professional practice teams.</p>	

9.2.1 Organisation Mission (values and beliefs) and Strategy

In regards to client focus, there is maintenance of a high service recipient client focus throughout the discourse change. This continued high focus is a key legacy of the traditional charity and is what management utilised to engage employees as much as possible in the transformation. The traditional charity discourse has a portrayal of service recipient clients as subjects of pity, but this has diminished in the new discourse with charities now pro-actively aiming to portray these clients as valued members of society and not lost causes.

Traditional charities possess few stakeholder relationships outside the service recipient client relationships. This has changed with the case study charities proactively determining key new stakeholders and developing formal relationships with them. This is exemplified with charities targeting government as sources of grant funding as well as identification of key donor clients who may have high lifetime value for the charity. Associated with stakeholder relationships is the interface that charities have with external stakeholders. Funding bodies are increasingly targeted if management decides to aim to tender for gain government grants. The interface with the general public has increased as charities aim to gain more donor clients. Associated with the continued client focus discussed above, charities are moving from being somewhat reactive in interfacing with clients, to becoming more pro-active and strategic with both service recipient and donor clients. This is due to charities perceiving a more holistic approach to service recipients as more effective than the traditional ad hoc approach. Likewise, charities are making more contact with donor clients in a bid to gain more frequent donations.

Traditional charities, and even more modern charities do not perceive other charities as competitors in regards to service delivery. However, charities are regarded as competition in regards to funding. Whilst many traditional charities were relatively small in size, growth is regarded as needed in the longer-term to achieve economies of scale and the efficiency demanded by government fund providers and donor clients.

9.2.2 Leadership

The Board of Directors of charities have traditionally been volunteers, this is still the case, however the traditional directors, albeit well-meaning but not necessarily qualified, are being replaced by volunteers with increased levels of business professionalism and experience in keeping with pressure from government funding authorities and the general public for more efficiency within charities. In regards to managerial interventions, the relatively untrained managers of traditional charities who utilised a somewhat reactive approach have now been replaced by professional managers who utilise ongoing monitoring of operations to ensure efficiency. The operational emphasis has switched from day-to-day operations to a long-term strategy in keeping with modern business practices. In other words, the new charities are basically being operated as for-profit businesses. Whilst management of traditional charities were unwilling to take risks, modern charities undertake calculated risk, much the same as a typical business. This is in keeping with taking a longer-term focus rather than a short-term focus.

Top management within traditional charities are well meaning but often have little business experience and tend not to recognise the need to change to meet the changing environment. If management does not attempt to bring in change, it is likely

that sooner or later the Board of Directors will remove the managers and replace them with professional managers, often with for-profit sector experience. Managerial interventions from the CEO typically increase with the initiation of discourse change, and reduce once the new discourse has been embedded. To ensure the ongoing efficiency of the new discourse, top management typically review and rationalise existing operations for long-term operational efficiency and success. Associated with this is a skills/capability audit to determine the pre-existing skills within the organisation and identification of possible skills gaps. Management then puts in place appropriate strategies to fill these gaps. This includes retraining and upskilling of existing employees and/or employing new people with relevant pre-existing skills. Middle management operates under the direction of more senior management and has similar direction. The reactive actions of traditional charities are replaced in modern charities by more pro-active operations based around efficiency.

9.2.3 Employees

Employees working within charities generally have one of two broad job functions – service provision or fundraising. In a traditional charity, employees within both job functions have high job commitment because they believe in the cause of the organisation. They are, however, usually relatively untrained. As the new discourse is introduced the employees will have differing reactions to the new discourse. The service providers in particular, may question the changes to service provision and the increased reporting and emphasis on efficiency. However, if management can convince these employees of the improved benefits to service recipients, the employees will likely accept the changed discourse and embrace the training required to enable them to

operate within the new service delivery processes. The key issue for the service providers is the change in identity required of them in the new discourse – increased professionalism and accountability. For fundraisers, acceptance of the new discourse is perhaps less of a challenge as the new fundraising methods can be seen as allowing the charity to increase revenue for the benefit of the service recipient clients.

9.2.4 Organisational Structure

There is typically a low level of formalisation of operations within a traditional charity, exacerbated by a reliance on volunteers. The level of formalisation changes drastically as the new discourse is introduced, culminating in a high level of formalisation and use of KPI's in the new discourse. To enable control, management may increase centralisation when the new discourse is introduced, however, ultimately management is likely to de-centralise control once the new discourse is embedded to enable customised service provision within the local areas. Associated with the issues of formalisation and centralisation is departmentalisation. The ad hoc structure of a traditional charity is replaced with formalised specialist departments in the new discourse, albeit with strong inter-department communications.

Rewards for charity employees typically revolve around seeing the situation of service recipient clients improve. Financial rewards within charities have historically been lower than in the for-profit sector but increase within the new discourse commensurate with the need for more skilled employees.

The accountability of charity employees has historically been low – partly due to a number of the employees being volunteers and doing the work out of the goodness of their heart. The aspect of accountability is a major area of change in the new discourse

and a key reason why some employees leave charities during the discourse change. The introduction of personal and team KPI's is characteristic of the new discourse.

9.2.5 Interdepartmental Dynamics

Conflict amongst employees and between departments is not beneficial within any organisation. There is a possibility of conflict arising during the introduction of the new discourse. This conflict may occur between existing employees (who may not have yet embraced the new discourse) and new professionals brought into the organisation (who are familiar with the new discourse). It is the responsibility of management to ensure that any conflict is resolved and should ideally involve selling the new discourse to existing employees. In regards to connectedness, traditional charities often have a low level of connectedness due to management not having appropriate team-building skills, and due to the number of volunteers who work irregular days and hours. As the new discourse is introduced, connectedness improves as professional managers pro-actively introduce greater communication and cross-functional teams.

9.2.6 Summary of Market / Societal Orientation Dimensions Within the Cases

Table 9.1 and Sections 9.2.1 to 9.2.5 provided an overview of the transformation findings within the three cases as the charities moved from a traditional charity to a more market/societal oriented discourse model. The 'characteristics' within each phase of the transformation were based on various antecedents and other aspects of market/societal orientation (Duque-Zuluaga & Schneider 2008; Gonzalez *et al.* 2002;

Jaworski & Kohli 1993; Lafferty & Hult 2001; Sargeant *et al.* 2002) as well as various relevant characteristics identified during the fieldwork.

Table 9.2 overleaf summarises the level of market/societal orientation dimensions within each phase of the transformation and shows that the level of market/societal orientation based on the various dimensions increases as the transformation progresses. The dimensions utilised in Table 9.2 are based on the dimensions of market orientation (Jaworski and Kohli 1993; Narver and Slater 1990; Ruekert 1992; Shapiro 1988), the dimensions of societal orientation (Duque-Zuluaga & Schneider 2008; Sargeant *et al.*, 2002) and the synthesis dimensions of market orientation proposed by Lafferty and Hult (2001).

The Table indicates that ‘customer orientation’ in relation to service recipient clients is high in both the traditional charity discourse as well as the new discourse. The ‘customer orientation’ in relation to donor clients will increase, however the ultimate level of donor client orientation will be determined by the other types of revenue sources targeted by the charity. For example, if a charity has little reliance on government grants, reliance on donor clients is likely to be higher than if the charity receives large amounts of government funding.

In a traditional charity, other charities are not regarded as ‘competitors’. However, in the new discourse, other charities are regarded as competitors for funds, but as potential collaborators for service provision. In keeping with the increase in overall market orientation within the new discourse, ‘intelligence generation’ and the subsequent ‘intelligence dissemination’ increases from the low level within traditional charities to a high level in the new discourse. Likewise, ‘responsiveness’ increases as the organisations develop more targeted and efficient service delivery processes. The move towards greater use of managerialism and formal management practices results in

Table 9.2 – Summary of Market / Societal Orientation Dimensions Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
Dimensions of Market Orientation				
<ul style="list-style-type: none">• Customer orientation (Narver & Slater 1990)<ul style="list-style-type: none">○ Service recipient○ Donor	<p>High.</p> <p>Moderate</p>	<p>High (maintenance of traditional charity ethos).</p> <p>Increasing (if donors perceived as key source of revenue)</p>	<p>High (maintenance and reinforcement of traditional charity ethos).</p> <p>High (based on relative reliance on donors for funds compared to other sources of revenue)</p>	
<ul style="list-style-type: none">• Competitor orientation (Narver & Slater 1990)	Other charities not viewed as competitors.	Introduction of some collaboration with other charities, but also commencement of competition for government and donor funds.	Increasing collaboration but competitive for government and donor funds.	
<ul style="list-style-type: none">• Intelligence generation (Jaworski & Kohli 1993)	Minimal generation.	Improving capabilities and expertise.	High level of capability and expertise.	
<ul style="list-style-type: none">• Intelligence dissemination (Jaworski & Kohli 1993)	Minimal dissemination.	Improving capabilities and expertise.	High level of dissemination.	
<ul style="list-style-type: none">• Responsiveness (Jaworski & Kohli 1993)	Dependent upon resources, typically reactive.	Review/rationalisation of services leading to improved responsiveness.	High level of responsiveness in target service delivery areas.	
<ul style="list-style-type: none">• Develop strategy & tactics (Ruekert 1992; Shapiro 1988)	Minimal, if any, strategy. Reactive tactics.	Introduction of capability, commencement of strategy development.	Formalised long-term strategy with pro-active tactics.	

continued overleaf

Table 9.2 (continued)– Summary of Market / Societal Orientation Dimensions Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
Dimensions of Societal Orientation				
• Responsiveness (Sargeant <i>et al.</i> 2002)	Dependent upon resources, typically reactive.	Review/rationalisation of services leading to improved responsiveness.	High level of responsiveness in target service delivery areas.	
• Client/beneficiary/recipient orientation (Duque-Zuluaga & Schneider 2008)	High level but reactive.	Continued high level but review of service offerings.	High level and holistic.	
• Donor orientation (Duque-Zuluaga & Schneider 2008)	Reactive, focus on small scale revenue generation e.g. raffles.	Identification of high life-time-value donor clients.	Proactive relationship development, use of formal relationship management tools.	
• Resource acquisition orientation (e.g. government funds) (Duque-Zuluaga & Schneider 2008)	Nil.	Increasing identification and development of new revenue sources.	Proactive relationship development with key target revenue sources.	
• Volunteer orientation (Duque-Zuluaga & Schneider 2008)	High proportion of volunteers hence high orientation.	Decreasing reliance on volunteers as professionals replace volunteers.	Low volunteer orientation due to minimal reliance on volunteers.	
• Paid employee orientation (Duque-Zuluaga & Schneider 2008)	Limited paid employees.	Increased use of paid professional employees.	High reliance on paid professional employees hence high orientation.	
• Collaborative orientation (Duque-Zuluaga & Schneider 2008)	Minimal.	Work with other charities for ‘common’ societal ‘good’ and increasing collaboration once relevant targets are identified.	Pro-active collaboration with any perceived relevant stakeholders.	
• Learning & social entrepreneurship (Duque-Zuluaga & Schneider 2008)	Minimal.	Emphasis on learning.	Ongoing learning in both service delivery and revenue generation sections with social entrepreneurship introduced to diversify revenue sources.	

continued overleaf

Table 9.2 (continued)– Summary of Market / Societal Orientation Dimensions Within the Cases.

	Traditional Charity	Phase 1 New Managerialism	Phase 2 Professionalism	Charity Hybrid Model <i>Market/Societal Orientation</i>
‘Synthesis dimensions of Market Orientation’ (Lafferty & Hult 2001)				
<ul style="list-style-type: none">Emphasis on customer	<u>Service recipient client</u> – High emphasis but reactive. <u>Donor</u> client – Low emphasis and reactive.	Ongoing high level but trend to holistic involvement of customer. Classification of existing donor clients into categories.	High emphasis and holistic. High emphasis & proactive development of high life time value donor clients.	
<ul style="list-style-type: none">Importance of information	Low.	Improving capabilities and infrastructure.	High with formalised marketing information system.	
<ul style="list-style-type: none">Interfunctional co-ordination	Low.	Emphasis by management to improve co-ordination.	High level of co-ordination with use of leadership forums, cross-functional teams and professional practice teams.	
<ul style="list-style-type: none">Taking action	Poor execution and implementation, typically reactive.	Improved capabilities, skills and service delivery analysis.	Professional execution & implementation, proactive based on strong planning and analysis.	
Organisational Performance				
	<ul style="list-style-type: none">Struggle to obtain revenue.Inefficient.	Review of existing operations with re-structuring to improve performance.	<ul style="list-style-type: none">Improved service recipient client outcomes due to more targeted and customised products.Increased revenue generation.Improved employee satisfaction due to increased range of services for service recipient clients.Organisational efficiency enabling better use of limited funds.	

greater development of ‘strategy and tactics’ aimed at both short and long term operations of the organisation.

The societal orientation dimensions offered by Duque-Zuluaga and Schneider (2008) include ‘volunteer orientation’ and ‘paid employee orientation’. The traditional charity discourse possessed a high level of volunteer orientation with a lower level of paid employee orientation. This balance definitely switches in the new discourse, with volunteers becoming a low priority, whereas the increased emphasis on professionalism results in a higher orientation towards paid employees.

‘Learning and social entrepreneurship’ is another dimension offered by Duque-Zuluaga and Schneider (2008). The research has determined that both learning and social entrepreneurship are relevant in the new discourse, thus confirming Duque-Zuluaga and Schneider’s (2008) decision to offer this as a separate and specific dimension in their model. Whilst learning is not a high priority in a traditional charity discourse, the modern discourse definitely includes, indeed requires, learning to ensure the existing employees become accustomed to their new requirements within the new discourse. Similarly, social entrepreneurship is somewhat lacking in a traditional charity, but is evident in both the Arana and Camira case studies.

9.3 A Conceptual Best Practice Framework for Management of Change Within Charities

Following the examination of the three cases (Chapters 5-8) and the data provided in Table 9.1 and discussed above in Section 9.2, these insights can be

utilised to develop a conceptual best practice framework to guide management to transform a traditional charity to a more modern organisation better capable of competing in the current environment. This subsequently developed best practice framework is provided in Table 9.3 overleaf and indicates the recommended managerial actions appropriate for each of the various organisational characteristics. This is based on the learnings gleaned from examination of the three case organisations. Table 9.3 is discussed in detail in the following Sections 9.3.1 to 9.3.5

9.3.1 Organisation Mission (values and beliefs) and Strategy

Client focus is a key aspect of market orientation. Charities typically have an inherent strong focus on service recipient clients so should maintain this focus after the discourse transformation and, in fact, can utilise the existing service recipient client focus as a bridge and legacy from the previous discourse to gain ‘buy-in’ from employees. Thus, this maintenance of high client focus should be regarded as the foundation rock of the new discourse. As well as continuance of this high focus, the focus on service recipient clients should also switch to perceiving these people as valued members of society rather than objects of pity.

In a traditional charity discourse, donor clients, although necessary to enable charities to gain funds to exist, often have less focus relative to service recipient clients. Charities should therefore increase focus on donor clients and recognise the need to have a balanced focus on both service recipient clients as well as donor clients. This increased focus on donor clients can be assisted via implementation of customer relationship management to identify key target donors, and utilisation of

Table 9.3 – Conceptual Best Practice Framework for Development of a Hybrid Charity.

Charity Hybrid Model <i>Market/Societal Orientation</i>	
CHARACTERISTICS	
Organisation Mission (values and beliefs) and Strategy	
<ul style="list-style-type: none"> • Client focus <ul style="list-style-type: none"> ○ Service recipient clients ○ Donor clients 	<p>Maintain and reinforce emphasis of high service recipient client focus characteristic of traditional charity. Switch from portrayal of service recipient client as subject of pity to portrayal of service recipient client as valued member of society.</p> <p>Utilise customer relationship management to identify key target donors. Implement relationship marketing to develop bonds with key donors (individual and corporate) and government fund providers.</p>
<ul style="list-style-type: none"> • Competitive focus ○ Organisational size 	<p>Increase collaboration with other charities for synergistic service delivery to minimise resource wastage and to provide service recipient client with most appropriate service provision. Notwithstanding, recognise high competition with other charities for individual and corporate donations and government funds.</p> <p>Grow to achieve economies of scale to improve performance. Grow via increase in market share within existing markets and/or expansion of geographic regions served and/or via increased range of services offered. Reduce growth once no further economies of scale can be achieved.</p>
<ul style="list-style-type: none"> • Stakeholder relationships 	<p>Identify key stakeholders. Develop strategic and well-planned relationships with key stakeholders.</p>
<ul style="list-style-type: none"> • Interface with external stakeholders <ul style="list-style-type: none"> ○ Funding bodies ○ Publics ○ Service recipient clients ○ Donor clients 	<p>Develop and maintain capability to increase success in gaining access to government funds.</p> <p>Increase interface to gain new donor clients.</p> <p>Introduce holistic/customised service approach with pro-active involvement of service recipient client in service provision.</p> <p>Increase pro-active frequency of contact.</p>

continued overleaf

Table 9.3 (continued) – Conceptual Best Practice Framework for Development of a Hybrid Charity.

Charity Hybrid Model Market/Societal Orientation	
Leadership	
<ul style="list-style-type: none"> • Board of Directors 	Increase proportion of business professionals via pro-active targeted invitations to potential candidates.
<ul style="list-style-type: none"> – Managerial interventions 	Ongoing professional monitoring of operations. Interventions as appropriate to ensure continuance of smooth operations.
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Emphasis 	Ensure long-term strategy development.
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Risk aversion 	Introduce calculated risk to enable achievement of organisation goals.
<ul style="list-style-type: none"> • Top Management (CEO) 	Employ experienced business professional generally from for-profit sector.
<ul style="list-style-type: none"> – Managerial interventions 	<p>Utilise high involvement during establishment phase in leading change –</p> <ul style="list-style-type: none"> • change management skills • skills/capability audit • leverage existing capabilities • develop formalised strategy • gain buy-in from all organisation • introduce new language • increase staff training • increase internal marketing • change organisational image/identity • new managerial job titles <p>Reduce involvement following embedding change in discourse. Ongoing overview of operations.</p>
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Emphasis 	<p>Ensure organizational efficiency and long-term strategic perspective. Introduce diverse range of highly specific and appropriate services. Diversify revenue sources including increased government funding and increased social entrepreneurship including establishment of for-profit activities. Ensure ongoing staff training as appropriate to ensure appropriate employee skill levels.</p>
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Risk aversion 	<p>Utilise calculated level of risk. Increase level of entrepreneurialism to assist achievement of organisation goals.</p>
<ul style="list-style-type: none"> • Middle Management 	Utilise high achieving, experienced internal service employees and new business professionals typically from for-profit sector.
<ul style="list-style-type: none"> – Managerial interventions 	Enable opportunity for significant ongoing consultation and input into organisational strategic goals and tactics.
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Emphasis 	<p>Continue organisational efficiency. Increase involvement in medium and long-term strategy. Increase use of promotion- personal selling, advertising, publicity, public relations.</p>
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Risk aversion 	Increase opportunity for risk-taking to achieve organisational objectives.

continued overleaf

Table 9.3 (continued) – Conceptual Best Practice Framework for Development of a Hybrid Charity.

Charity Hybrid Model <i>Market/Societal Orientation</i>	
Employees	
<ul style="list-style-type: none"> • Service providers <ul style="list-style-type: none"> – Organisational commitment – Identity – Esprit de corps <ul style="list-style-type: none"> o perception of marketing 	<p>Employ staff with high commitment to new discourse.</p> <p>Employ professionals willing to accept high accountability.</p> <p>Employee staff that embrace the new discourse.</p> <p>Educate staff regarding the value of selected use of “7P’s” to achieve organisational goals.</p>
<ul style="list-style-type: none"> • Fundraisers <ul style="list-style-type: none"> – Organisational commitment – Identity – Esprit de corps <ul style="list-style-type: none"> o perception of marketing 	<p>Employ staff with high commitment to new discourse.</p> <p>Employ professionals willing to accept high accountability.</p> <p>Employ staff that embrace the new discourse.</p> <p>Educate staff regarding use of 7P’s to achieve organisational revenue generation goals.</p>
Organisational Structure	
<ul style="list-style-type: none"> • Organisational Systems <ul style="list-style-type: none"> – Formalisation – Centralization <ul style="list-style-type: none"> o departmentalisation – Rewards <ul style="list-style-type: none"> o intrinsic / “raison d’etre” o financial o respect – Accountability <ul style="list-style-type: none"> o Personal o Organisational 	<p>Develop high level of formalisation to ensure service quality and ease of reporting for government audits.</p> <p>Introduce high use of KPI’s.</p> <p>De-centralise to cater to localised service recipient client needs and wants but overseen by centralised top management to ensure co-ordinated organisation.</p> <p>Create formalised specialist departments and enable strong inter-department communications.</p> <p>Reinforce employee satisfaction from high quality service recipient client service delivery.</p> <p>Offer competitive salaries to attract appropriate staff.</p> <p>Provide high respect due to predominantly professional employees.</p> <p>Emphasise employees’ need for high personal accountability based on personal KPI’s.</p> <p>Ensure ongoing processes enable compliance with audits by government fund providers.</p> <p>Minimise administrative expenses to appease various stakeholders including general public and donor clients.</p>
<ul style="list-style-type: none"> • Interdepartmental Dynamics <ul style="list-style-type: none"> o Conflict o Connectedness 	<p>Develop low conflict climate.</p> <ul style="list-style-type: none"> • Utilise ongoing communications and publicise role of each department to enable high level of connectedness. • Use regular integrated internal communications. • Establish leadership forums / cross-functional teams / professional practice teams.

subsequent relationship marketing to develop bonds with key donors (individual and corporate) as well as government fund providers.

Management of charities need to recognise the existence of other charities, and determine the appropriate focus to have with these charities. There will be a competitive focus relative to other charities in regards to vying for donations and government funds. However, there should also be co-operation for the common good in regards to collaboration on service provision to increase efficiency in an industry regularly battling for funds – this will result in the best use of funds to achieve maximum societal benefits.

Charities typically recognise the need to grow to create economies of scale needed to survive. Management should thus identify an appropriate target size for the charity, and implement a growth strategy to enable this size to be reached in a timely manner. This growth may be via merging with, or acquisition of other charities. Another option is to expand the range of services offered within the current geographic region, or expand into other regions – these options should however be considered in relation to the affect/consequences on other charities.

Associated with the client focus, charities need to identify potential other key stakeholders and develop relationships with them. Charities need to not only determine a focus, but also then develop an appropriate interface with these stakeholders. For example, government funding bodies are a key potential source of revenue so it is essential to develop and maintain capability to interface with the key government personnel. Likewise, appropriate interface is needed with the general public to gain new donors. The interface with service recipient clients should be via a holistic service delivery including pro-active involvement of clients rather than the

traditional reactive singular contacts. Charities should also be pro-active in increasing frequency of contact with donor clients.

9.3.2 Leadership

As much as possible, leadership of a modern charity should be structured and operated similarly to a for-profit business – for reasons of efficiency and long-term viability. Whilst the Board of Directors of the charity will still be composed of unpaid volunteers, the number of Directors with business skills should be increased via pro-active targetting of appropriate people within the local business community. By developing a more professional Board of Directors, managerial interventions will be typical of a for-profit Board – with a focus on long-term strategy development with calculated business risk.

Similarly, top management (CEO) should ideally consist of experienced business professionals, preferably with not-for-profit experience, but possibly sourced from the for-profit sector, but who have an appropriate affiliation and understanding of the overall aims and underlying ethos of charities. With such top management, their managerial interventions will be associated with change management, leveraging existing capabilities, improving service delivery, ensuring appropriate employee skills (via either retraining/upskilling existing employees if needed, or employing new people) and developing a formalised long-term strategy. Based on direction from the CEO, the middle management, consisting of existing high achieving employees and new business professionals should assist the CEO to achieve the new discourse.

Managers should also look to gain to services of external consultants for short-term access to specialist skills. For example, tax consultants can assist charities to capitalise of the taxation benefits afforded to not-for-profit organisations and restructure payment packages to employees to assist in making salaries more competitive with similar jobs in the for-profit sector.

To assist in the circulation of the new discourse, managers should focus on the employees and instill in the employees the fact that the previous discourse was not best practice. Employment within charities can be very insular, with long-term employees having little, if any, exposure to other modes of operation. Employees tend to replicate past actions, and need to be informed of the need to change their mode of operation.

9.3.3 Employees

A vital requirement for success of the new discourse is employees committed to the new direction of the charity and who are willing to accept the higher level of personal accountability and new modes of day-to-day operation. Thus, during the change management process, management need to gain buy-in from the existing employees and ensure they possess the appropriate skills (possibly via additional training), and/or employ new professional staff with the relevant skills. This is required in both the service provision as well as the fundraising sections of the charity. The identity of these employees will be based around professionalism and the associated high accountability.

9.3.4 Organisational Structure

The new discourse should contain a high level of formalisation to ensure quality services, with ongoing accountability via reference to KPI's. Whilst centralised top management oversees the operations of the organisation, there should be de-centralisation of empowerment to the employees at any branches and regional centres to enable effective catering to local market needs. Formalised specialised departments with strong inter-department communications will assist to ensure an efficient and effective organisational structure.

Optimum performance is achieved by high performing employees. The employees are likely to perform well if they perceive appropriate rewards. The underlying "raison d'être" for charities is to provide services to people who are not always able to help themselves. By providing high client service delivery and seeing their clients benefit, employees will gain high intrinsic job satisfaction. Coupled with this, there is a need to also offer competitive financial rewards. The introduction of more professional job requirements will require an increase in salaries as the intrinsic reward of seeing service recipient clients helped will not by itself guarantee high performance from employees.

The new discourse is characterised by high levels of accountability, both individually and organisationally. The individual accountability should be based on personal KPI's, whilst organisational accountability is measured via KPI's and external audits.

9.3.5 Interdepartmental Dynamics

A traditional charity is often associated with a low level of operational efficiency and less than optimum interdepartmental dynamics due to poor management skills as well as a reliance on volunteers working irregular hours. The modern discourse should utilise ongoing communications to develop a low conflict climate. This can be assisted by regular internal communication via newsletters, and establishment of cross-functional teams, as well as professional practice teams which bring together employees in similar job roles from different geographic locations.

9.3.6 Section Summary

By following the various recommendations in the best practice framework, managers will be in a strong position to successfully convert a traditional charity into a more market/societal oriented organisation with improved organisational performance. A key issue that needs to be addressed at employee level is acceptance of the need to change to survive, but the management challenge is how to stay a 'charity' whilst changing and embedding the new discourse. This is a make or break point for management and any organisational change must revolve around maintenance of the charity legacy. Management should communicate to employees the maintenance of service recipient client focus despite the change. It should be noted that whilst this conceptual best practice framework provides guidelines, there is no single, all encompassing model, particularly in regards to revenue generation and managers should therefore determine the existing capabilities within their organisation and leverage these to develop an appropriate new discourse. A 'caring,

client-first attitude' is a valued legacy from the original discourse and should be utilised by management as a strategic resource to gain buy-in into the new discourse by the employees, as the fundamental values of existing employees do not change.

9.4 Contributions to Knowledge

In keeping with Bourner's (1996, p.10) recommendation, the final part of the research process is 'reflection and integration'. Thus, this section assesses how the research relates to current thinking, where the research fits into the field of knowledge and subsequently the contribution to the field. This section also examines the originality, relevance and timeliness of the research.

The research offers a number of *generic* contributions. Using Bourner's (1996) checklist, the research fills gaps in the current literature; it assists in clarifying the specific areas in which existing market orientation ideas apply; it offers a synthesis of existing ideas; it looks at existing situations from a new theoretical orientation (discourse theory) and it offers ideas for future research. The *specific* contribution of the research is that it advances the knowledge and understanding of the discourse change within a traditional charity when the various components of market orientation are introduced.

In regards to filling gaps in the current literature (Bourner 1996), whilst extensive analysis of aspects of market orientation has been conducted over the past few decades, this has been moreso in a for-profit organisational context, with research into market orientation within not-for-profit organisations including charities being considered to be an under-researched area (Bennett 2005; Sargeant *et al.* 2002;

Warnaby & Finney 2005). Current literature typically involves assessing the level of market orientation within not-for-profit organisations at specific points in time, or develops conceptual models regarding appropriate frameworks for a market orientation or a societal orientation within not-for-profit organisations. This literature has been spread somewhat thinly across the gamut of not-for-profit organisations. There is no existing marketing literature examining *change* within a charity when a more market-oriented discourse is introduced. This thesis therefore contributes to filling gaps in the current literature by presenting, for the first time, an examination of the *change* within an organisation as management attempt to introduce some form of market orientation. This has resulted in a theoretical contribution via the development of a conceptual best practice framework (Table 9.3) for the management of change within charities as they try to improve organisational performance. We now know that introduction of market orientation into a charity (based on the analysis of three case organisations) firstly requires a transition through new managerialism and professionalism phases. This is an issue not previously postulated in the literature hence another contribution of this thesis. The conceptual best practice framework places managers in a better position to now know how to successfully introduce a market orientation into a charity. This thesis clarifies and highlights that market orientation cannot simply be applied directly onto a charity without significant change first.

In regards to clarifying the specific areas in which existing ideas apply (Bourner 1996), - whilst there are claims that marketing, and hence market orientation is relevant not just in the for-profit arena but is also relevant in the not-for-profit arena (e.g. Kotler & Levy 1969), the research has re-affirmed and clarified that

market orientation, in some form, is appropriate for at least the charity sub-sector of the not-for-profit arena.

In terms of offering a synthesis of existing ideas (Bourner 1996), the research joins together various ideas regarding the form of market orientation that is relevant for charities. As indicated earlier, current frameworks of market/societal orientation within the not-for-profit sector are somewhat broad and attempt to cover all sub-sectors of the not-for-profit sector. There are specific differences between sub-sectors that may require sub-sector specific frameworks rather than an all-encompassing framework.

Whilst developing the best practice framework, we now know that various improvements to the current not-for-profit market/societal orientation frameworks have been identified. Namely - the Sargeant, Foreman and Liao (2002, p. 49) 'societal orientation framework' can be improved by subdividing 'stakeholder focus' into the various stakeholders as per Duque-Zulanga & Schneider (2008) as each stakeholder should be identified as they may be treated differently – particularly with the trend towards professionalism which is likely to decrease the focus towards volunteers. The Duque-Zulanga & Schneider (2008, p. 32) model can be also improved by dividing 'volunteer and employee orientation' into separate issues for the same reason. The Gonzalez, Vijande and Casielles (2002, p. 63) market orientation elements in not-for-profit organisations framework is somewhat general in nature and does not account for government fund providers to charities. Thus their framework can be extended to include other stakeholders such as government fund providers.

The Duque-Zulanga & Schneider (2008, p. 32) model of societal orientation is somewhat unique in that it includes a specific 'learning and social entrepreneurship' dimension. The research has determined that both learning and social

entrepreneurship are relevant in the new discourse, thus contributing to the literature by confirming Duque-Zuluaga and Schneider's (2008) decision to offer 'learning and social entrepreneurship' as a separate and specific dimension in their model.

The research also looks at existing situations from a new theoretical orientation (Bourner 1996) - namely a discourse perspective and thus advances discourse theory by adding to the arenas in which it can be applied to analyse specific situations. It also specifically introduces application of Foucault's (1991) discourse transformation criteria into not-for-profit organisational analysis. The framework of Foucault (1991) was found to be useful in providing a worthwhile and convenient guide to detecting the changes that affect discursive formations. This research has demonstrated that complex discourse theory can be utilised in an applied manner to analyse an organisation to offer insights into praxis regarding organisational change. Change is vitally connected to what things mean to people, how they communicate, and what actions they take. The discourse approach provided useful theoretical insights to assist in framing an examination of organisational change and makes discourse relevant to industry.

Use of discourse theory provided the ideal framework to examine and track changes within the organisation. It enabled analysis of the transformation through the eyes of the employees and how their identity changed. It also enabled analysis of how language, communication and practice changed. It enabled the framing of ideas – the ways employees know and think about their jobs, and the impact on their identity and relationships. A discourse approach also assisted examination of the shifting of power relations and the notions of resistance and what is regarded as truth as organisational change occurred. All these insights are based on a discourse approach and typically do not occur in more regular research approaches in relation to examination of market

orientation. Thus, the use of discourse theory as utilised within this thesis not only makes a unique and significant contribution to the body of knowledge regarding aspects of market orientation in specifically in a not-for-profit context, but in an overall market orientation literature context. Thus, we now know that use of discourse theory can successfully be utilised to examine organisational change as a market orientation is introduced into a charity.

Another contribution of the research is that it offers ideas for future research (Bourner 1996) that will be discussed in detail in Section 9.7. These generic contributions (Bourner 1996) to the field of marketing research are subsets of the specific contribution of the research, namely the advancement of our knowledge and understanding of the discourse change within a traditional charity when the various components of market orientation are introduced.

Not only does the research provide significant contributions to knowledge and understanding as discussed immediately above, the research is also highly original based on the criteria for PhD originality offered by Phillips and Pugh (2000). The research sets down ‘a major piece of new information in writing for the first time’ (Phillips & Pugh 2000, p. 63) based on first hand data collected from charity employees. Never before has the change within a charity when market orientation is introduced been previously examined. The research also utilises ‘known material but with a new interpretation’ (Phillips & Pugh 2000, p. 63), namely market orientation knowledge but with a discourse perspective. The research brings ‘new evidence to bear on an old issue’ (Phillips & Pugh 2000, p. 64), namely, how marketing can be utilised by not-for-profit organisations, and examines ‘areas that people in the discipline haven’t looked at before’ (Phillips & Pugh 2000, p. 64), i.e. the changes

within a charity, particularly the affect on employees, when marketing discourse is introduced.

As well as providing numerous contributions and being original, the research is also highly relevant. It is generally accepted that the concept of a market orientation is relevant in the not-for-profit sector. For example, Bennett (1998b) as cited in Bennett & Sargeant (2005, p. 800) 'identified a link between market orientation and fund-raising performance in small/medium sized UK charities'. Given the increasing awareness and perceived importance of social marketing, plus the key role not-for-profit organisations play in assisting the wellbeing of society, research such as conducted in this thesis that assists not-for-profit organisations become more effective may be considered highly appropriate.

The research is also timely. Australian researchers, Murray and Carter (2005, p. 429) have indicated that '...many not-for-profit organisations ... face new levels of competition' and likewise, Cantrell (2005, p. 30) has indicated that in Australia there is 'an environment of increased competition for scarce resources amongst non-profits'. The research is perhaps especially pertinent at present due to the current global economic downturn that is not only reducing the availability of donor money for charities but is placing even more demand on charities for their services. This provides strong justification for not-for-profit organisations to look towards becoming more market oriented to fight the competition.

9.5 Managerial Implications

The research has shown that poorly operating charities can gain improved organisational performance via the introduction of new managerialism, professionalism and the dimensions of market orientation. However, the nature and history of traditional charities is such that the leadership (board of directors, top and middle management), although well intentioned, often do not have the skills and knowledge regarding how to operate a charity in the current environment, nor do they often recognise the need to change. It is thus highly recommended that charities become aware of the need to change, and subsequently gain the relevant business skills at senior management level to enable the charity to operate in a more businesslike manner (new managerialism), incorporate increased levels of professionalism and aspects of the four key dimensions of a market orientation. Ideally, existing management will recognise the need to change to meet the ever-changing environment and will already possess the skills to implement change, otherwise they can upskill existing management and/or there may be a need to employ new managers with the appropriate skills. By employing new managers, often from outside the not-for-profit sector, charities can gain access to best practice management. By doing so, charities can improve 'performance' resulting in increased revenue and more efficient operations to enable the organisation to deliver improved and expanded services to both existing and new service recipient clients in a highly efficient manner.

Introduction of new managerialism, professionalism and the dimensions of a market orientation typically involve a major discursive shift for a charity that needs to be introduced in a well-planned and deliberate manner. Such a shift is likely to be

greeted with mixed reactions from existing employees. It is essential to carefully consider which elements of legacy discourses should be transferred/articulated to the new discourse to maintain continuity, commitment to values and minimise trauma to, and resistance by employees. A key finding of the research is that an extremely strong client-first ethos exists amongst existing employees in the charity sector, particularly amongst service providers. This characteristic should be utilised as the primary element retained from the legacy discourse – a foundation rock - and can be leveraged by actually developing the client-first ethos around services marketing concepts that potentially result in improved services for service recipient clients based around a services dominant logic.

Gaining legitimisation and acceptance from the existing employees and involving them in all stages of the discursive shift will minimise resistance. The discursive shift typically results in a change of language in use, with the ‘language of business/commerce’ being introduced to replace the language used in the previous discourse. Managers must be aware of the potential unease amongst existing employees and the need to train employees in the newly introduced language to assist in a smooth introduction and understanding of the new discourse. Managers also need to recognise and appreciate how the discourse change impacts on both the organisational and individuals’ identities and their work practices. This typically requires providing existing employees with assistance (e.g. training) to enable them to progress towards a more professional manner of carrying out their daily job activities as required in the newly professionalised organisation.

There is also a need for specialist expertise for short periods of time, to assist managers with the new discourse. Charities should thus utilise consultants on an as needed basis. For example, to develop the best tax planning structure (to take

advantage of the tax breaks offered to the not-for-profit sector by the government) to assist in developing salary packages that are more competitive with the for-profit sector.

The new discourse should be communicated to employees via a range of modes, for example via employee meetings, newsletters, notice boards and special presentations. By utilising a range of communications, there is more likelihood that employees will ultimately be sold on the new discourse.

The three case studies have indicated that a market-oriented discourse can ultimately be introduced in various forms, but firstly there is a need to introduce new managerialism, followed by professionalism. Only then is the organisation in a position to pro-actively introduce aspects of market orientation. Management should study the existing discourse within their charity and determine the most appropriate form of market orientation that should subsequently be introduced and embedded. For example, a social entrepreneurialism model can result in new and creative methods of revenue generation and the development of innovative new services. Existing unsophisticated activities such as traditional direct marketing to gain donations and other funds can be improved via introduction of direct marketing best practices from the for-profit environment, whilst services marketing and relationship marketing can be utilised to improve the delivery of services to clients and create ongoing linkages with revenue providers. The appropriate aspects of market orientation to introduce, particularly in relation to revenue raising are likely to be based on existing capabilities that can be leveraged and developed in the new discourse.

The manner in which the new discourse is introduced and circulated within the charity is a key issue for management to consider, and this will likely need to vary from charity to charity dependent upon the prevailing climate, size and structure of

the organisation. Perhaps the ideal situation is where the existing top management recognise the need to change and are relatively well skilled in change management and can thus introduce the change in a well-planned and co-ordinated manner over a period of time. This occurred to a reasonable extent within the Arana case study. However, the Bukari case highlighted that even a skilled new CEO, experienced in introducing a market oriented discourse into charities can mis-read their new organisation and potentially push changes too quickly.

Table 9.3 provides managers with a conceptual best practice framework to assist in the change process aimed at progressing a traditional charity into a more market/societal oriented organisation. This thesis utilised Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations as a framework to examine the discourse change within the three cases. Foucault's criteria proved highly effective in enabling the various aspects of the change process to be examined, and subsequently assisted in development of Table 9.3. It is recommended that managers aiming to introduce change into a charity organisation not only be guided by Table 9.3, but also keep in mind the key aspects of discourse transformation – displacement of discourse boundaries, the position and role of the speaking subject, language and circulation of the new discourse. By being aware of the change in boundaries, the effect on employees, the role language plays in introducing change, and the manner in which change is introduced, managers can be better placed to utilise appropriate processes to maximise the smooth introduction of their proposed new discourse.

Overall, in summary, managers should engage employees in the discourse transformation process by involving them in the circulation of the new discourse. This can be done via involvement of employees in planning days, committees and cross-functional teams. Managers should transfer a valued dimension from the

traditional (legacy) charity discourse, namely the client-first ethos as an articulation into the new discourse. This client first ethos can be leveraged and improved in the new discourse via services marketing principles based around services dominant logic. Managers should be aware that change will affect the personal identity of employees, particularly the trend towards professionalism. Managers should therefore provide appropriate training, either formal or informal to enable employees to gain the appropriate knowledge and skills to adapt to their new required roles.

9.6 Research Limitations

To ensure quality, the research design was based upon guidance from internationally recognised researchers who are specialists in their specific fields. In regards to overall aspects of qualitative research, the works of Creswell (1998; 2003; 2007), Lincoln & Guba (1985), Miles & Huberman (1994) as well as Patton (2002) provided insight. Case study direction was obtained from publications by Eisenhardt (1989), Gummesson (2007), Stake (1995) and Yin (1993; 1994). The discourse perspective was guided by the writings of Foucault (1972b; 1980) and Fairclough (1992; 1995b) with the analysis of the discourse transformation informed by Foucault's (1991) work. A theoretical discourse orientation can potentially lead to a concentration on meaning. To overcome this potential limitation, discourse was treated in this thesis as both meaning and action to ensure that managerial and employee practices could also be examined.

It is however recognised that all research arguably has limitations. It is acknowledged that this thesis is limited in various ways. Firstly, three case studies

were utilised within this study. As indicated within Section 4.3.4.2, there are arguments that a single case is sufficient; there are also arguments that multiple cases provide improved quality. Three cases were regarded as appropriate for a PhD level thesis due to the resultant size of the thesis. More cases could offer greater insight into the research area and may also reveal other approaches to discourse transformation and thus, extra cases also offer potential for future research.

A second limitation of the study is that it was restricted to employees within the charities who agreed to be interviewed. Thus, only the views of employees who agreed to be interviewed were captured, not the views of any employees who may have not agreed to be interviewed. Past employees were not interviewed. Information from past employees may have been useful in either verifying or contradicting comments gathered from current employees regarding the reasons that some employees left the organisations. Further insight may also have been gathered via interviewing other stakeholders, in particular the donor clients of the charities and also the service recipient clients of the charities. Once again, this offers potential for further research.

A third limitation related to the nature of the charities studied. This relates to issues of access to organisations (based on whether senior management will agree for their organisation to be involved in the research or not), as well as geographical proximity. In this research, the three case organisations were within a relatively small geographic area. Coverage of a larger geographic area could be included in future research. Other limitations are based on time and budget constraints associated with the need to ‘restrict’ the research to a size appropriate for a PhD thesis. These limitations do provide suggestions for future research that are detailed in the following section.

A fourth limitation is that only the charity sub-sector of the not-for-profit sector has been examined. The research confirmed that market orientation is relevant to the charity sub-sector, but, whilst market orientation is regarded as appropriate to the broad not-for-profit sector, it is not at this stage known which aspects of the results and findings in this research can be transferred to other not-for-profit sub-sectors.

9.7 Directions for Future Research

The limitations discussed above assist in offering various directions for future research. This thesis focussed on interviewing of current employees within charities, but including previous employees/managers and other stakeholders of each charity has the potential to offer analysis and differing perspectives on different subject positions within the discourse transformations. Interviewing previous employees/managers in particular has strong potential to gather data to assist in either verified or further enhancing and expanding the currently developed best practice framework. A key aspect of discourse transformation is selling the change to existing employees and it is considered that previous employees may offer valuable information to assist development of the framework in regards to how charity managers can best minimise loss of human capital and redesign managerial interventions as the discourse transformation is implemented.

The research has involved three case study organisations operating within the south-east region of Australia. Future research could involve examination of more charities either within the same region, or in other regions of Australia, or

internationally. Whilst there are some international commonalities affecting charity organisations such as the current global economic downturn, there are likely to be some local unique domestic factors that may affect the operation of charities in specific communities within a country, as well as in different countries. Examples may be the range of specific social issues affecting communities as well as the policy of local, regional and national governments in addressing such issues. For example, the trend in Australia towards government financing of charities to deliver services to the community may be totally different in other countries and thus require different revenue raising models and reliance on other sources of revenue.

This thesis has examined charities addressing differing community needs – from people suffering from specific medical conditions, to people with other quality of life issues. Future research could examine charities that target the same segment of the community to determine if the charities utilise similar or differing modes of discourse. Likewise, the thesis included analysis of one religious-based charity. Future research could thus include examination of charities practicing various religious faiths to determine if similar or differing forms of market orientation are relevant in each faith. For example, the more popular religious faiths may find it easier to raise funds from the general community via donations whereas the less common faiths may struggle to raise funds via the same methods.

The research examined three medium sized charities. Future research could examine charities of differing sizes – small, medium and large, as it is possible that differing organisational dynamics may operate in charities of differing sizes and that introduction of a marketing discourse may potentially be easier in a smaller charity than a larger charity.

The research indicated that employees within charities have differing perspectives dependent upon their specific subject positions. In other words, a charity viewed ‘through the eyes’ of a service provider is somewhat different to a charity viewed ‘through the eyes’ of a fundraiser, particularly in relation to competition with other charities. Future research could examine the nature of ‘competition’ between charities and the somewhat unique interplay between charities whereby they aim to operate in a collaborative manner to deliver the best outcomes to service recipient clients, whereas they compete against each other for funds. This competition is ongoing in regards to donations from individuals and corporates, but somewhat sporadic in relation to government tender submissions that tend to be once or twice a year.

Charities aim to assist service recipient clients, and dependent upon the nature of the charity and the clients’ needs, this assistance may be either short-term or ongoing. Future research could examine issues regarding possible conversion of existing service recipient clients into potential donor clients. Are service recipient clients, once fully assisted and no longer in need of further assistance willing or interested in becoming donor clients?

The increased professionalism within charities requires higher monetary rewards for employees, although the underlying intrinsic reward of seeing service recipient clients benefit is still regarded as a key reward wanted by employees. Future research could examine how much emphasis charity employees place on financial rewards, and how much financial reward they are willing to forego to work in a charity rather than a for-profit organisation.

Whilst the case studies examined charities that were known to have attempted to introduce market orientation, the actual level of success was not known prior to

conduct of the research. All three charities were found to have been successful in introducing some form of market orientation. Future research could examine organisations that were known prior to commencement of the research to have been unsuccessful in introducing market orientation. This may offer further insights into what management should or should not do in attempting to introduce market orientation.

Whilst the current research examined a discourse change retrospectively, future research could involve action research in which the researcher is immersed in an organisation as it commences, and goes through the journey of transformation. This may offer the researcher extra insights not available via the research approach utilised in this thesis.

Although market orientation is regarded as relevant for the overall not-for-profit sector, this current research only examined the charity sub-sector as it was considered that there are key differences between the various sub-sectors. Future research could include examining introduction of market orientation into other not-for-profit sub-sectors using the same research approach, namely Foucault's (1991, pp. 56-57) four criteria for identifying discourse transformations. It is possible that charities possess unique characteristics that are different than organisations in other not-for-profit sub-sectors. These unique characteristics may either assist or hinder the ability for managers to introduce market orientation.

9.8 Thesis Summary and Conclusion

It is suggested that moving from a charity discourse to a new discourse incorporating relevant aspects of market orientation can enable charities to improve organisational performance in the face of increasing competition. Given the long-established and entrenched nature of charity discourse, the introduction of a new discourse is not straightforward. The thesis has thus focussed on two discourses that are of interest to both academics and practitioners – the discourse associated with market orientation, and the charity discourse, and what happens when market orientation is introduced into the charity organisation.

The aims of this research were to -

1. *Examine the process of introducing and legitimising a marketing discourse into charity organisations.*
2. *Develop a conceptual best practice framework to guide charities.*

Questions linked to these aims are -

1. *How do charity organisations implement a discourse transformation?*
2. *What dimensions of a marketing discourse are adopted by charity organisations?*
3. *How does the management of charity organisations legitimise adoption of a marketing discourse amongst employees?*

The research has achieved its aims to ‘*Examine the process of introducing and legitimising a marketing discourse into charity organisations*’ and subsequently ‘*Develop a conceptual best practice framework to guide charities*’. The result is the

ultimate development of Table 9.3, a key contribution of this thesis, which offers managers a best practice framework to manage change to convert a traditional charity into a more market-oriented charity containing appropriate aspects of marketing discourse to assist in achieving improved organisation performance.

In regards to the questions linked to the aims -

1. *How do charity organisations implement a discourse transformation?* Using a Foucauldian approach I was able to show how charities actively change the discourse boundaries, develop new positions and roles for employees, introduce new language and circulate the new discourse. These issues have been described in detail for each of the three case studies in Chapters 5,6,7 & 8 and overviewed in Section 9.2 and Table 9.1.
2. *What dimensions of a marketing discourse are adopted by charity organisations?* I have determined that various dimensions have been adopted by the charities to differing degrees. These results are summarised in Tables 8.2 and 9.2.
3. *How does the management of charity organisations legitimise adoption of a marketing discourse amongst employees?* I have determined that this is best achieved via the managerial interventions listed for Top Management in Table 9.3 with continuance of a key aspect of the legacy discourse, namely the high level of client focus which is a characteristic of traditional charities. This needs to be maintained in the new discourse to appease existing employees and gain buy-in to the new discourse.

In summary, the research has identified how management of three charity organisations in the south-east region of Australia have implemented and legitimised a discourse transformation within their organisations. The managers of the charities

had various levels of knowledge, experience and skills in implementing change that resulted in relatively smooth change implementation within Arana and Camira, but a less smooth implementation within Bukari. Involving all employees in the change process was a key success factor, exemplified by Camira employees actively participating in the strategic planning process. The research has also identified the dimensions of marketing discourse that have been adopted by the charities and to what extent. Whilst the four synthesis dimensions of market orientation are all relevant to charities, adoption is not an easy process and requires development of capabilities and changes to the mind-sets of a number of existing employees. Finally, the research has identified that legitimisation of the new discourse within the charities involves maintenance of key aspects of the legacy discourse, particularly the 'client first' aspect.

It has been shown that the introduction of the four key components of market orientation into the three charities has assisted in improved performance. This improved performance is exemplified by the increased revenue generation since the discourse transformations (refer to Tables 5.1, 6.1 and 7.2 for Arana, Bukari and Camira financial results respectively). Improved service delivery and a more targeted range of services also exemplify the improved operating performance of the charities. However, the discourse transformations were not smooth, with various employees within the three charities either leaving during the course of the transformation, or taking time to accept the transformation. Following the introduction of the four components of market orientation into the charities, the resultant discourse in each charity was characterised by a more businesslike and professional approach with numerous standard practices and procedures to formalise and embed the new discourse.

In conclusion, the research has indicated that charities can successfully introduce a more market/societal oriented approach for the benefit of all stakeholders but caution needs to be taken to ensure it is introduced in an appropriate manner and new managerialism and professionalism need to be introduced before market/societal orientation can be embedded. Whilst discourse transformation reflecting a more market-oriented approach supplants the previous charity legacy discourse, a key remnant of the legacy discourse as perceived by the employees was the more caring nature of staff in comparison with for-profit organisations. This situation has potential to cause ongoing struggle as management wrestle with the aim of operating with limited resources, maintaining ongoing efficiency and sustainability whilst still continuing a 'client-first' ethos. However, the conceptual best practice framework provided in Table 9.3 offers managers appropriate recommended actions to successfully transform a traditional charity into a modern and better performing organisation.

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APPENDICES

APPENDIX 1 - Summary of Research Regarding Market Orientation

Appendix 1: Table 1 – Summary of Research Regarding Market Orientation.

Appendix 1 Table 1a - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Ahmadi & Helms	1997	Business grads. in SME's.			Lit review	SME	Not stated	UK	n/a	Win-win potential for graduates in SME.
Appiah-Adu & Singh	1998	CO on BP, plus innovation and competitive environment.	101	20.2	Marketing managers	SME	Manufacturing & Service	UK	Deshpande et al	CO positive to performance, Innovation positive to CO, market dynamics not related to CO.
Atuahene-Gima & Ko	2001	MO & entrepreneurship on product innovation.	181	37.3	Judgement sample of innovative exporters.	SME & Large	Manufacturing & Service	Australia	KJK	MO firms provide greater managerial support for innovation than entrepreneurial firms.
Avlonitis & Gounaris	1999	Determinants of MO.	444	14	MD. 5 point Likert	SME & Large	Consumer, Industrial and services	Greece	Hooley as well as KJ	MO is based on combination of firm attitude and behaviour.
Baker & Sinkula	1999	Synergy of Learning orientation and MO on BP.	411	21	Senior marketers and non-marketers	SME & Large	Range	Not stated - assume US	KJK	Higher order learning assists competitive advantage.
Baker & Sinkula	1999	Synergy of learning orientation, MO & innov. on BP.	411	21	Senior marketers and non-marketers	SME & Large	Range	Not stated - assume US	KJK	MO & LO assist innovation, but LO may be more important than MO.
Baker & Sinkula	2002	Levels of learning.			Theoretical	n/a	n/a	n/a	n/a	Generative learning gives radical innovation.
Barrett, Balhoun & Weinstein	2005	Creativity.	267		267 responses within 23 firms - Multiple responses & snowballing	Medium & Large	Nonprofit - health care and education	US (5 southeast states)	KJK	Creativity assists learning.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Becherer, Halstead & Haynes	2001	Effect of internal environment on MO.	215	31	CEO	SME	Not stated	US (Large mid-west metro)	Refined Morris & Paul	Low control improves MO, CEO is important in fostering MO.
Beverland & Lockshin	2004	Entrepreneurism (unplanned) vs planned.			In-depth case studies	SME	Wine	NZ		Balance is required.
Bhaskaran	2006	Incremental Innovation & BP for SME's.	96	28.55		SME	Seafood retailers	Victoria, Australia	n/a	Incremental innovation assists SME's BP.
Bigne, Blesa, Kuster & Andreu	2004	MO as antecedent to power in supply chain.			179 dyads. 5 point Likert. Structural equation modelling	Not stated	Ceramic tiles	Spain	NS & KJ	Manufacturer MO has positive effect on reward power but not on referent power.
Brindley & Richie	2000	Undergraduate win-win opportunities in SME's.			Longitudinal action-learning in 12 firms	SME	Manufacturing & Service	UK	n/a	Some opportunity for win-win - but not strong.
Cadogan & Diamantopoulos	1995	Affect of internationalisation on MO			Concept framework			International		Internationalisation can affect MO
Caruana, Ramaseshan & Ewing	1997	MO vs Organisational commitment.	134	45.6	Heads of State Government Departments 7 point Likert	Large	Public Service	Australia	KJK	Direct link between MO & Commitment. Not related to organisational size.
Castro, Armario & del Rio	2005	Effect of MO on employee commitment and on customer satisfaction.			184 Employees and 3623 customers interviewed with questionnaires	Not stated	Banking	Spain (2 towns)	NS	Employees play strong role in assisting MO.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Cervera, Molla & Sanchez	2000	MO in public organisations.	399	41.1, 32.7	Dual informants, 5 point scale		Local government	Spain	KJK	MO assists BP.
Chang & Chen	1998	Linkage between MO, service quality & BP.	116	37		Not stated	Security brokerage service	Taiwan	NS	MO positive on BP, Service positive on BP. MO also assists via other than service.
Chang, Mehta, Chen, Polska & Mazur	1999	Effect of MO on effectiveness and efficiency.	161	Finland 101=16.8% Poland 60=69.7%	5 point Likert	Not stated	Auto distribution	Finland & Poland	Modified NS	MO positive associated with service quality and customer service.
Chaston	1997	Entrepreneurial style on BP.	92	30.7	Replication of US survey of large firms	SME	Manufacturing	UK	n/a	Entrepreneurial style positive on BP.
Chen & Hambrick	1995	Competitive behaviour of small vs large firms in single industry.			28 major airlines - structured content analysis of public access info.	Small & Large	Airlines	US	n/a	Small firms are faster implementers.
Cravens, Piercy & Prentice	2000	Product strategies to achieve market-driven strategy.			Conceptual only	n/a	n/a	n/a	n/a	Framework developed to assess relevance of various dimensions.
Dalgic	1998	Dissemination of MO in Europe.			Literature review	n/a	n/a	n/a	n/a	Europe MO stresses importance of customer relationship.
Darroch & McNaughton	2003	Knowledge management and innovation.	443	27.8		>50 employees	Not stated	NZ	KJK	MO considered a subset of knowledge-management orientation.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Day	1994	Capabilities of market-driven firms.			Framework only	n/a	n/a	n/a	n/a	Capabilities-based approach.
Deng & Dart	1999	MO in Chinese firms				Various	Various			Difference across industries.
Deshpande & Farley	1999	Cross-cultural comparison.	75		56 Quadrads (2 buyer/seller) in Japan, & 29 quadrads in India	Not stated	Not stated	India & Japan	Deshpande et al.	MO positive for BP in both countries, innovation and BP positive correlated but more in Japan. Org climate positive for BP, Entrep better than closed.
Deshpande, Farley & Webster	1993	Corporate culture, CO & innovation vs BP.	50		50 Quadrads (2 buyer/seller) interview of Mktg Exec of public firms 5point Likert	Not stated	Not stated	Japan	Adapted KJ and NS	Difference between supplier and customer on assessment.
Ellis	2006	Performance, and Cultural			Meta analysis		Various	Various	Various	MO affects perf, cultural distance weakens MO
Elg	2003	MO in retailers.			Case study of 1 firm	Large	Food retailing	UK	KJ	Inter-firm relationships very important for retailers.
Enright & Malkin	2003	MO in rural setting.			Owner/manager of 10 firms. Semi-structured interviews.	SME	Various	Australia (NE Victoria)	NS & KJ	Common factors between rural and city, but some specific rural factors also.
Farrell	2000	Learning organisation.	268	15	CEO mail survey.	Large	Not stated - assume various	Australia	NS	Change strategies influence MO, mgt behaviour & style impact learning. MO is positive to LO. LO stronger on BP than is MO.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
French, Kelly & Harrison	2004	Role of strategic planning vs BP.	129	17.9	Mail survey. 7 point Likert	Small	Professional service	Australia (Regional NSW)	n/a	No significant relationship between BP and planning. Significant relationship between net profit and informal planning.
Gainer & Padanyi	2005	MO & culture linkage.	559	31		Not stated	Nonprofit - social service, community support and art	Canada (Toronto & Montreal)	KJK	Culture moderates MO/performance linkage.
Gatignon & Xuereb	1997	Strategic orientation & new product development.	420	14	Mail survey. Mktg executives	Not stated	Various	US	Not stated	Different strategic orientation is best for differing environments.
Gilmore, Carson & Grant	2001	Networking & relationship building.			In-depth interviews with 45 owner managers.	SME	Various business markets	Northern Ireland & Australia (Melbourne)	n/a	Networking is positive for SME's.
Gilmore, Carson & O'Donnell	2004	Owner/manager attitude to risk.			In-depth interviews with 40 owner-managers.	Small	Not stated	UK (Regional)	n/a	In contrast to stereo-type of entrepreneur - results indicate they do consider risk.
Gounaris, Avlonitis & Papastathopoulou	2004	Behaviour of firm when MO implemented.	444	14	Mktg Mgrs. Mail. 5 point Likert	Not stated, assume large bias	Not stated	Greece	Hooley et al.	MO results in planning, strategy formulation & implementation, control by organisation.
Gray & Hooley	2002	MO vs BP in service firms..			Discussion only.	n/a	Service	n/a	n/a	Discussion only.
Green, Inman, Brown & Willis	2005	Organisational structure on MO.	173		7 point Likert	Not stated	Manufacturing	US	DF MORTN 1998	Formalisation positive predictor of MO. Specialisation, decentralisation and integration not found to be predictors of MO.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Han, Kim & Srivastava	1998	Innovation.	134	59.5	Single informant - Mktg Mgr. 5 point Likert	Not stated	Banking	US (Mid-west)	NS	MO facilitates innovation.
Harding	1998	MO in nonprofits.	270				Nonprofit	Canada		Conflicts of interest moderate MO.
Harris	1996	Cultural obstacles to MO.			Intensive case study of 1 firm	Medium	Retail	UK	n/a	4 groups of barriers - basic assumptions, shared values, organisational artefacts, symbolic influences.
Harris	1998	Barriers from shop floor perspective.			Intensive case study of 2 firms - from shopfloor view	Not stated	Retailing	UK	Not stated	7 main categories - apathy, instrumentality, limited power, task compartmentalisation, ignorance, weak management support.
Harris	2000	Organisational barriers.	107	61	Store managers	Large	Retail	UK	KJK	8 barriers identified to explain over 75% of MO.
Harris	2002	Resistance to MO culture change by employees.			Exploratory - 174 field interview in 4 case organisations	Not stated	Not stated	Not stated	Not stated	4 main rationale to resist change.
Harris & Ogbonna	1999	Critical evaluation of culture management.			critique of literature	Not stated	Not stated	Not stated	n/a	MO culture misunderstood.
Harris & Ogbonna	2001	Leadership style.			7 point Likert.	Not stated	Various	UK	NS	Participative and supportive leadership is pos to MO. Leadership is an antecedent to MO.

Appendix 1: Table1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Harris & Piercy	1997	Argues MO is free.			Author's personal viewpoint / critique	n/a	n/a	n/a	n/a	MO can be is part of everyday firm activities - training & dev, information gathering, planning, internal communications, recruitment etc.
Harris & Piercy	1999	Management behaviour.			Postal survey. 7 point Likert	Large	Food retailing	UK	Modified NS	Vertical communication important, conflict negative on MO, politics and formalisation negative to MO.
Harris & Watkins	1998	Impediments to MO.			44 exploratory interviews	Small	Hotels	UK	n/a	Low level of MO exists. Managers/owners present the main impediment.
Harrison & Shaw	2004	Role of culture.			165 employees via 11 focus groups within 1 organisation		Library	Australia (Victoria)		Various interpretations of marketing.
Helfert, Ritter & Walter	2001	Inter-organisational Relationship perspective moderator on MO.	153	38	7 point Likert	Mainly SME	Software & advertising	Germany	Not stated	Trust and commitment increase level of relationship.
Hooley, Lynch & Shepherd	1990	Implementation of marketing concept.		27	Chief Mktg Exec.	Not stated	Not stated	UK	n/a	4 distinct clusters regarding role of marketing.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Horng & Chen	1998	MO in Taiwan.	76	15.2	CEO 5 point Likert	SME	Not stated	Taiwan	Modified NS & KJ	Intelligence generation is key requirement to achieve BP. Commitment and esprit de corps strongly related to organisational responsiveness. Management training is important.
Hurley & Hult	1998	MO and innovation and learning	9648	48	Questionnaire	Lagre	Government	US	n/a	Innovation assists performance.
Javagli, Martin & Young	2006	Importance of market research info in MO.			Case studies	Large	Services	Global	n/a	Mktg research is key for MO, but antecedent if developing strong ability to gather information.
Jaworski & Kohli	1993	Antecedents & consequences of MO.	452		Marketing & non-marketing in SBU's. 1st sample - 222 SBU's ave mkt share of 30%. 2nd sample - 230	Large	Various	US	JK	Top management emphasis on MO affects intelligence generation. Top mgt risk aversion does not affect intelligence generation or dissemination, but negative affect on responsiveness. Formalisation does not affect MO.
Kara, Spillan & DeShields Jr	2004	MO versus business performance in nonprofit.	148	14.8		Various	Nonprofit	US	KJK	KJK valid in nonprofits.
Kyriakopoulos & Moorman	2004	New products.	75	78	VP of Marketing	Not stated	Packaged food	Netherlands	KJK	MO assists new product performance.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Lado, Maydeu-Olivares & Rivera	1998	MO framework expanded to include distributor and environment.	66		34 firms in Belgium, 32 in Spain	Not stated	Insurance	Belgium & Spain	Customised	MO is country-specific.
Lancaster & van der Velden	2004	Employee characteristics on MO.			Action research of 22 employees in 1 bank	Large	Banking	Netherlands	Not stated	"Belongingness" important.
Langerak	2001	Customer/supplier MO perceptions.	72		72 sets. 7 point Likert	>50 employees	Manufacturing	Netherlands	Adapted Langerak	MO positive for BP.
Lee & Tsai	2005	Learning, innovation and MO.	100	42		Large	Manufacturing & Service	Taiwan	Not stated	MO, LO, Innovation linked.
Lings & Greenley	2005	IMO.			7 point Likert.	Not stated	Retail	UK	Adapted KJ	IMO positive for customer satisfaction, competitive position, staff attitudes, retention and compliance.
Liu	1995	Firm size vs MO.	287	52		\$ based	Manufacturing	UK	Not stated	Larger firms more MO and more BP.
Low	2005	Business environmental factors on MO.	73	23.4	Correlation analysis	SME	Manufacturing	Australia (Greater Western Sydney)	Slater & Narver 1994	No significant relationship.
Martinsons & Hosley	1993	MIS			Case study	Large	Hospital	Hong Kong	n/a	MIS assists.
Mason & Harris	2005	Implementation.			In-depth semi-structured interviews, grounded theory	Not stated	Various	Not stated	NS	8 key inhibitors determined.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Matear, Gray & Garrett	2004	New products and brand investment.	231		231 firms. Mktg as well as CEO's	Various	Services	NZ	Gray et al. 1998	New prods and brand investment assist BP, MO in combination does not directly assist BP.
Matear, Osborne, Garrett & Gray	2002	Innovation.	231		231 firms. Mktg as well as CEO's	Not stated	Services	NZ	Gray et al. 1998	MO assists BP, directly and via innovation, with innovation as a mediator.
Matsuno & Mentzer	2000	Role of business strategy as moderator of MO/performance relationship.	364	38.8	Respondents from commercial vendor list	Not stated	Manufacturing	US	Combination	Strategy type moderates MO/performance linkage.
Matsuno, Mentzer & Ozsomer	2002	Entrepreneurism.	364	38.76	Mktg execs.	Not stated	Manufacturing	US	KJK	Entrepreneurial style has pos, direct and indirect (via reduction in departmentalisation) link to MO.
Matthews & Scott	1995	Uncertainty and planning by entrepreneurs vs non-entrepreneurs.	130	17		<500 employees	Not stated	US (Mid-west city)	n/a	Uncertainty results in decreased planning. Entrepreneurs do more planning than non-entrepreneurs.
Mavondo, Chimhanzi & Stewart	2005	Learning orientation, HR, Innovation.	220	35	CEO	Not stated	Hi-tech, professional services and hospitality	Australia	NS	HR practices assist LO & MO. HR and innovation are mediators.
Muthaly & Voola	2004	MO (as a resource) assists adoption of e-business.	1023	18.5	Sourced from Austrade Website. Least partial squares	Not stated	Not stated	Not stated - assume Australia	NS	MO as capabilities positively effect e-business adoption and competitive advantage.
Naidu & Narayana	1991	MO in hospitals.	153	50.3			Hospitals	US	Customised	MO assists performance.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Nasution & Mazondo	2004	Integrated (reactive & proactive) MO & customer value.	231	29	Direct mail - from Hotel directory - Correlation analysis	Not stated	Hotels	Indonesia	NS	Integrated MO is extension of MO and assists customer value.
Naude, Desai & Murphy	2002	IMO.	231	21	Employees in one firm	Large	Services	UK	n/a	Need manager MO, communication, socialisation and satisfaction.
Noble, Sinha & Kumar	2002	What is best strategic orientation.			Longitudinal action-learning over ten years based on corporate annual reports.	Large	Retail (mass merchandiser and discount)	US	NS	Competitor orientation, brand focus and selling orientation exhibit superior BP.
Nwankwo, Owusu-Frimpong & Ekwulugo	2004	Impact of organisational factors on MO.	107	17.24	CEO 5 point Likert	Not stated	Facilities management	UK	KJK	MO culture permeated all organisations, regardless of size.
O'Gorman	2001	Sustainability of growth.			2 in-depth longitudinal studies. 20 years of growth	SME	Wholesale (cash and carry)	UK	n/a	"Where to compete" & "How to compete" are key issues.
Ottesen & Gronhaug	2002	Managers' understanding of MO.			Semi-structured interview with 4 managers	Medium	Salmon farming	Norway	Not stated	Managers' understanding of MO can differ strongly from academic literature.
Ottesen & Gronhaug	2004	Knowledge transfer from academia to practitioners - barrier to MO.			Discussion only.	n/a	n/a	n/a	n/a	Discussion only.
Padanyi	2001	Levels of MO.						Canada		Differing levels of MO depending upon target.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Padanyi & Gainer	2004	Levels of MO.	453	25.1		>\$50,000 budget	Nonprofit	Canada		Differing levels of MO depending upon target.
Pelham	1997	Moderating effects of product and customer differentiation.	160	14	Dual President & Sales Manager	Small	Industrial manufacturing	US	Various including NS & KJK	MO relevant for both commodity and hi-tech firms.
Pelham	1999	Influence of environment.	229	23	Managers	Small (\$20-100 million)	Manufacturing	Not stated	Composite	Industry characteristics have minimal influence.
Pelham	2000	Influences on performance.			160 firms. Dual respondents - Presidents & Sales Managers.	SME	Manufacturing	US	NS & KJ	MO has more influence than strategy, size, industry characteristics on BP. Fast response is also important.
Peterson	1989	Adoption of marketing concept vs other strategies.	483			Small	Various	US	n/a	Mktg concept not caught on yet for small businesses.
Peterson & Lill	1981	Marketing factors.			71 case reports	Small	Not stated	Not stated	Not stated	Customer-oriented is key to success.
Pulendran, Speed & Widing	2000	Antecedents to MO - replication of KJK.	105	21		SME & L	Various	Australia	KJK	Replicated KJK.
Pulendran, Speed & Widing	2003	Relationship between Market planning, MO, BP.	89	18	SBU Managers	Not stated	Various	Australia	KJK	Good planning as an antecedent to MO assists BP, rather than independent to MO.
Renko & Carsrud	n.d.	Operationalising MO (intelligence).			Prelim. qual. interviews with 6 CEO's	SME	Biotechnology	US (Delaware Valley)	K & J	Prelim to quantitative research.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Ruekert	1992	MO across SBU's.			1 firm - 5 SBU, multi-informants	Large	Hi technology	US	Customised	MO varies across SBU's, related to organisational processes (e.g. recruiting), individual attitudes, BP
Salavou, baltas & Lioukas	2003	Determinants of innovation.			Personal interviews with CEO's of 150 firms	SME	Manufacturing - food, beverage and textile	Greece	Ruekert 1992	MO & learning increase innovation. Increased competition increases innovation.
Sashital & Jassawalla	2001	Process of managerial implementation of mktg plans.			50 in-depth interview with Managers	SME	Not stated	Not stated	Not stated	Implementation is adaptive
Seymour, Gilbert & Kolsaker	2006	MO in UK charities.					Nonprofit - charities	UK (England & Wales)		High level of MO, particularly in larger organisations. Customer rather than competitor oriented.
Slater & Narver	1994	Competitive environment as moderator.			81 SBU's (84%) in forest prods. 36 SBU's (74%) in manuf.	Large	Forest products & diversified manufacturing	US	NS	MO/BP link not affected by competitive environment.
Slater & Narver	2000	Intelligence generation.	66	7	CEO	Various	Electronics	US	NS	4 distinct modes of intelligence generation.
Smith	1997	Resource issues - market research			3 case studies	Small	Various	UK	n/a	Resource issues.
Tang, Wang & Zhang	2005	Mktg strategy vs BP.	141			Small (ave 172 employees)	Construction	China	n/a	Long-term strategy, R&D and length of years in business positive for BP.
Terziovski	2003	Networking practices.	115	21	Managers	SME	Various	Australia	n/a	Multiple networking assists BP.

Appendix 1: Table 1a (continued) - Summary of Research Regarding Market Orientation - Antecedents & Moderators										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Van Egeren & O'Connor	1998	Drivers of MO.			Surveys of top management team (289 people) in 70 firms.	Medium and large	Various services	US (Upper mid-west state)	NS	MO positive for BP. Management is antecedent to MO. External dynamism antecedent to MP.
Varela & del Rio	2003	Time factor.	200		200 interviews (GM or Marketing Mgr)	Min 20 employees	Food, timber & chemical	Spain	KJ	Centralisation negative to MO, competitive intensity doesn't influence time.
Verhees & Meulenber	2004	MO & innovation on product innovation.	152			Small	Rose growers	Netherlands	Mixed - NS, KJK, Reukert	Innovation permeates all variables.
Voss & Voss	2000	MO versus Performance in Artistic environment.	109	85			Nonprofit professional theatre			Artistic ideas preferred by customers.
Warnaby & Finney	2005	Creating customer value.			Single Case study	Large	Nonprofit - library	UK	Not stated	Case study of implementation.
Watson, Hogarth-Scott & Wilson	1998	Success factors in start-up.	166	33	Owner managers	Small	Various	West Yorkshire, UK	n/a	Govt support helps.
Weerawardena & O'Cass	2004	Antecedents to competitive advantage.	326	25.6		Various	Metal-based manufacturing	Not stated	Not stated	Entrepreneurship is important in sustainable CA.
Wijewardena & Cooray	1995	Determinants of growth.	53	18.3		Small (<300 employees)	Manufacturing	Japan (Kobe)	n/a	Larger firms grow faster.
Wood & Bhuian	1993	Management characteristics			Conceptual		Nonprofit			Org and Snr management characteristics can influence MO

Appendix 1: Table 1b - Summary of Research Regarding Market Orientation - Measurement Development & Validation										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Caruana	1999	Assessment of MARKOR.			13.8% response in UK, 96.5% in Malta Mktg Directors	Large	Service	UK & Malta	KJK	Scale may lack generalisability across industries, economies and cultures.
Deshpande & Farley	1998	Synthesis of 3 MO into 1 new "MORTN" scale.			82 managers in 27 Euro & US firms - members of Marketing Science Institute	n/a	n/a	Europe & US	NS, KJ, Deshpande et al.	New scale considered appropriate.
Gray, Matear, Boshoff & Matheson	1998	Measure of MO.	490	45	Incentive for reply	All (medium bias)	Various	NZ	Various (Deng & Dart, NS, KJ)	Valid instrument to measure MO developed.
Harris	1996	Critical review of Kohli and Jaworski model.			Author's personal viewpoint / critique	n/a	n/a	n/a	n/a	Model is of major theoretical and practical use despite some limitations.
Harris	2002	Measurement of MO.	123	12	123 full sets of 6 questionnaires (2 intra-company, 2 customers, 2 competitors) 7 point Likert	Large	Manufacturing	UK	Adapted	Single informant inappropriate, need customer, competitor, supply chain views as well.
Hooley, Fahy, Greenley, Beracs, Fonfara & Snoj	2003	Scale validity in transition economy setting.			629 = 40% Slovenia 589 = 20% Hungary 401 = 20% Poland CEO	Medium & Large	Services	Slovenia, Poland & Hungary	NS	NS scale is valid.

Appendix 1: Table 1b (continued) - Summary of Research Regarding Market Orientation - Measurement Development & Validation										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Kara, Spillan & deShields	2005	Scale validity in SME setting.	153		Owner/managers	SME	Retail	US (3 major states)	KJK	MARKOR appropriate in SME, positive link between MO & BP.
Kohli, Jaworski & Kumar	1993	Scale development.	203	47.2	230=47.2% marketing executives, 102 firms with 229 SBU's - mktg and non-mktg executives.	Large	Various	US	KJK	Scale development.
Matsuno, Mentzer & Rentz	2000	Modification of KJK MARKOR scale.	364	38.8	From commercial vendor list	Not stated	Manufacturing	US	KJK	Improved scale claimed.
Mavondo & Farrell	2000	Generalisability of MO scales across B2B & Consumer markets.	426	22	CEO	Large	B2B & Consumer	Australia	NS & KJK	NS best across culture, country, industry.
Oczkowski & Farrell	1998	Form of MO - replication of Greenley UK study but in Australia.			CEO 190=17.1% (private) & 237=29.2% (public)	Large	Various	Australia	NS	Emphasis to customer and competitor rather than interfunctional co-ordination.
Oczkowski & Farrell	1998	Comparison of NS & KJ scales.			CEO of 237 public and 190 private firms from Dunn & Bradstreet lists	Not stated, assume large	Not stated	Australia	NS & KJ	NS MKTOR superior to MARKOR.

Appendix 1: Table 1b (continued) - Summary of Research Regarding Market Orientation - Measurement Development & Validation										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Pitt, Caruana & Berthon	1996	Scale testing - replication in Europe.	161	17	161=17% UK, 200 interviews in Malta	Various	Various	UK & Malta	KJK	MARKOR reliable across companies, cultures and industries.
Pulendran, Speed & Widing	2000	Replication of KJ in Australia.	105	21		Large	Various	Australia	KJK	KJK relevant in Australian setting.
Slaer & Narver	2000	Replication of 1990 re linkage of MO to business Performance.			Questionnaire of GM, Mktg, HR in 53 SBU's of multibusiness corporations	Not stated	Not stated	US (3 western cities)	NS	Confirms generalisability of MO/profit relationship from 1990.
Vazquez, Alvarez & Santos	2002	MO scale for nonprofit sector.	191	24.52	7 point Likert	Not stated	Nonprofit	Spain	Composite	MO scale developed for nonprofit sector.
Venkatesan & Soutar	2000	Applicability of models in Australia.	542	14		SME	Various, but 50% services	Australia	NS & KJK	NS outperforms KJ.
Wrenn	1997	Measurement of MO.			Theory	n/a	n/a	n/a	n/a	Theory.

Appendix 1: Table 1c - Summary of Research Regarding Market Orientation -Performance Outcomes										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Appiah-Adu	1997	MO vs BP in small firms.			110 responses for 22%. Random MD's from Dunn & Bradstreet list	Small	Manufacturing & Service	UK	Pelham & Wilson	Positive linkage.
Balabanis, Stables & Phillips	1997	MO vs business performance.	58	29		Large	Nonprofits	UK	KJK	Larger organisations inhibited in becoming MO.
Blesa & Bigne	2005	Effect of manufacturer MO on distributors.			179 dyads. 5 point Likert. Structural equation modelling	Not stated	Ceramic tiles	Spain	NS & KJ	Manufacturer MO has positive effect on distributor satisfaction.
Cano, Carrillat & Jaramillo	2004	Meta-analysis MO vs BP.			58 published articles between 1990 and mid 2002	Various	Various	23 countries across 5 continents	27 KJK, 20 NS, 11 mixed	MO is positive to BP but varies across not-for-profit as profits.
Dawes	2000	MO vs BP. Components of MO not integrated.	93		Lagged BP measures, 93 firms, 1 yr gap. Personal interviews.	Not stated	Various (but manufacturing bias)	Australia (South Australia)	Adapted KJ, NS & Pelham & Wilson	Competitor orientation is important. Customer analysis and responsiveness are not important.
Gainer & Padanyi	2002	MO vs BP in cultural organisations.	138	21.2	CEO's		Nonprofit - cultural organisations	Canada		MO assists BP.
Grunert, Jeppesen, Jeppesen , Sonne, Hansen, Trondsen & Young	2005	MO in value chains.			Case studies of 4 value-chains	Not stated	Agribusiness & fisheries	NZ, Brazil, Norway, Denmark	Not stated	Level of MO depends on dynamism of end-user.

Appendix 1: Table 1c (continued) - Summary of Research Regarding Market Orientation -Performance Outcomes										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Kumar, Subramanian & Yauger	1998	MO vs organisation performance.	171	28.5	Questionnaire		Hospitals	USA	Modified N&S	MO assists perforamance.
Langerak	2003	Performance outcomes.			Meta-analysis of 51 studies	n/a	Various	Various	Various	Predictive power of MO open to question.
Mottner & Ford	2005	MO vs BP in cultural organisations.	165	21.9	7 point Likert		Nonprofit - Museums	US		MO assists BP.
Sehorn	1995	MO vs business performance in nonprofit.	320	32			Nonprofit - community sector	US	KJC	MO assists BP.
Steinman, Deshpande & Farley	2000	Supply chain MO perspectives.			Personal interviews - 2 respondents from customers and two from suppliers.	Not stated	Manufacturing	US & Japan	Deshpande et al	Gap exists in MO perception between customer and supplier.
Wood, Bhuian & Kiecker	2000	MO vs BP in nonprofit hospitals.								MO assists BP.

Appendix 1: Table 1d - Summary of Research Regarding Market Orientation - Specific Situations - Govt./SME										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Blankson & Cheng	2005	Adoption of MO by small business.			103 = 21% 5 point Likert. Correlation analysis	Small	Services & Industrial/manufacturing	US (Michigan)	Refined KJ	Size of firm does NOT moderate importance and application of MO.
Blankson & Stokes	2002	Manufacturing & service.	52	21	Owner/managers. 5 point Likert	Small	Manufacturing & Service	UK (Greater London)	KJ	MO framework is relevant for Small firms.
Carson & Gilmore	1993	Marketing Training of SME's .			Discussion	SME	n/a	UK	n/a	Discussion only.
Carson & Gilmore	2000	Marketing within SME's.			Conceptual only	SME	n/a	n/a	n/a	Framework developed to assess relevance of various dimensions.
Caruana, Ramaseshan & Ewing	1998	MO vs performance in Unis.	84	46.2	Heads of School - Business & Non-Business 7 point Likert	Large	Universities	Australia & NZ	KJK	Positive link between MO & performance in Uni sector.
Coviello, Brodie & Munro	2000	Relevance of traditional marketing paradigm in small firms.			302 managers from part-time executive programs in NZ & Canada - questionnaires, 5 point Likert.	Various	Various	NZ & Canada	n/a	Smaller firms more informal.

Appendix 1: Table 1d (continued) - Summary of Research Regarding Market Orientation - Specific situations - Govt./SME										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Fuller	1994	Marketing in SME's.			Case study of 5 firms	SME	Furniture manufacturing	Ireland	n/a	Varying levels of marketing are used.
Hogarth-Scott, Watson & Wilson	1996	Relevance of marketing to SME's.			In-depth case study interviews of 18 small business founders.	SME	Various	West Yorkshire, UK	n/a	SME owners tend to be generalists with limited knowledge of marketing.
McCartan-Quinn & Carson	2003	Marketing practices in small firms.			Discussion only.	Small	n/a	n/a	n/a	Existing marketing theories offer little of day-to-day use for small business.
Romano & Ratnatunga	1995	Mktg role is small firms.			Lit review of small firm articles 1986-92.	Small	Not stated	Not stated	n/a	3 main foci - culture, strategy, tactics.
Sonfield	1981	students assist small business.			Theory	n/a	n/a	n/a	n/a	Theory.
Tregear	2002	MO of craftsperson.			20 in-depth interviews	Small	Food	UK	Not stated	Balance MO and non-commercial aspects.

Appendix 1: Table 1e - Summary of Research Regarding Market Orientation - Theoretical/Conceptual Issues										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Carrillat, Jaramillo & Locander	2004	Market-driving framework within MO.			Conceptual only	n/a	n/a	n/a	n/a	Conceptual only.
Duque-Zuluaga & Schneider	2008	Conceptual framework of MO.			Conceptual only		Nonprofit			
Gonzalez, Vijande & Casielles	2002	MO in private nonprofits.					Nonprofit			Conceptual.
Heiens	2000	Conceptual framework of MO.			Concept only	n/a	n/a	n/a	n/a	2 x 2 matrix developed.
Henderson	1998	Questions framework of MO and research.			Author's personal viewpoint / critique	n/a	n/a	n/a	n/a	Questions distinctiveness of MO relative to other paradigms such as learning org, resources.
Jaworski, Kohli & Sahay	2000	Ways to drive-markets vs market driven.			Theory based on company examples	n/a	n/a	n/a	n/a	Frameworks proposed.
Kohli & Jaworski	1990	MO framework.			Lit review and in-depth interviews of 62 mgrs (33 mktg, 15 nonmktg, 14 snr mgt.) from 47 firms	SME & L	Various	US (4 cities)	n/a	Construct development.
Kolar	n.d.	Alternate model of MO.			theoretical	Not stated	Services	Not stated	n/a	6 component model based on customer focus
Lafferty & Hult	2001	Synthesis of MO frameworks.			Lit review	n/a	n/a	n/a	n/a	Lit review
Liao, Foreman & Sargeant	2001	Marketing concept on nonprofit.					Nonprofit			Societal orientation proposed

Appendix 1: Table 1e (continued) - Summary of Research Regarding Market Orientation - Theoretical/Conceptual Issues										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Lozano	2000	Measure - checklist in library context.			Theory	n/a	Libraries	n/a	n/a	Theory.
McGuinness & Morgan	2005	"Organisational change capability" construct to deliver marketing strategy.			Conceptual only	n/a	n/a	n/a	n/a	Conceptual only.
Murray & Carter	2005	Learning to assist Marketing intelligence.			Conceptual		Nonprofit			Conceptual - learning assists market intelligence.
Narver & Slater	1990	Measure of MO, plus framework.			1 firm. 140 SBUs. 440=84%. Single informants.	Large	Forest products (commodity & non-commodity)	US	NS	MO assists BP.
Narver, Slater & Tietje	1998	Strategies to create a MO.			Theoretical	n/a	n/a	n/a	Not stated	Theory only.
November	2004	Academic theory is irrelevant.			Personal critique	n/a	n/a	n/a	n/a	Personal critique.
Sargeant, Foreman & Liao	2002	Marketing concept on nonprofit.					Nonprofit			Societal orientation proposed.
Slater & Narver	1994	MO, customer value and BP.			Theory	n/a	n/a	n/a	n/a	Theory.
Slater & Narver	1995	Learning organisation.			Theory	n/a	n/a	n/a	n/a	MO plus Entrepreneurism assist learning org development.

Appendix 1: Table 1e (continued)- Summary of Research Regarding Market Orientation - Theoretical/Conceptual Issues										
Researchers	Year	Aspect	Sample Size	Response %	Method	Firm Size	Industry	Country	MO Scale Used	Findings
Slater & Narver	1998	Terminology - customer led vs market oriented.			Theory	n/a	n/a	n/a	n/a	Theory.
Slater & Narver	1999	Terminology - customer led vs market oriented.			Theory	n/a	n/a	n/a	n/a	Theory.
Uncles	2000	MO definition.			Theory	n/a	n/a	n/a	n/a	Theory.
Webster	1994	Definitions.			Theory	n/a	n/a	n/a	n/a	Theory.

Aspect Key

MO = Market Orientation

BP = Business Performance

SBU = Separate Business Unit

CO = Customer Orientation

IMO = Internal Market Orientation

Firm Size key

SME = Small and Medium Enterprise

MO Scale Key

NS = Narver & Slater

KJK = Kohli, Jaworski & Kumar

KJ = Kohli & Jaworski

Findings Key

LO = learning organisation

APPENDIX 2 - Antecedents, Consequences and Moderators of Market Orientation:
A Review of Literature.

Innovation / entrepreneurialism / new product development / learning

Various research suggests that innovation contributes to organisational success (Gatignon & Xuereb 1997; Hurley & Hult 1998; Kumar *et al.* 2000; Matear *et al.* 2004) and that an entrepreneurial style can positively affect organisational performance (Covin & Slevin 1988). There are however conflicting views regarding the linkage between market orientation and innovation. Slater and Narver (1995, p. 63) consider that a 'market orientation, complemented by an entrepreneurial drive, provides the cultural foundation for organisational learning' however Deshpande and Farley (2004a) consider that innovation/entrepreneurialism is not essential for success, whilst Han, Kim and Srivastava (1998) as well as Matear, Osborne, Garrett and Gray (2002) suggest innovation is separate to market orientation but necessary for effective firm performance. Keats and Bracker (1988), and more recently Matsuno, Mentzer and Ozsomer (2002) have also assessed entrepreneurial aspects in relation to market orientation with Matsuno, Mentzer and Ozsomer (2002) postulating that a linkage existed between level of entrepreneurship, organisational structure, market orientation and ultimate business performance. The findings however indicated that entrepreneurship by itself negatively impacted upon performance, and that there was a need for entrepreneurship to be used in conjunction with market orientation.

Beverland and Lockshin (2004a) have concluded that an entrepreneurial culture that developed a sustainable market strategy was a model for success, whilst in a not-for-profit hospital setting Wood, Bhuian and Kiecker (2000) also identified a positive link between market orientation and entrepreneurship. Following Slater and Narver (1994a), Lee and Tsai (2005) examined the relationships between market orientation, a learning orientation and innovativeness and concluded that a positive linkage existed between all factors. Mavondo, Chimhanzi and Stewart (2005, p. 1256) consider 'market orientation is an important antecedent to product innovation, process innovation and administrative innovation' and marketers 'must consider incorporating human resource practices in models of learning orientation and market orientation as this provides a holistic presentation and adds realism to such models'. Atuahene-Gima and Ko (2001) concluded that entrepreneurial firms have higher new product performance, but that market oriented firms offer greater support for innovation projects.

Specifically within smaller organisations, a positive link has been found between market orientation, entrepreneurialism and subsequent business performance (Appiah-Adu & Singh 1998; Bhaskaran 2006; Chaston 1997; Salavou *et al.* 2004).

Learning is also linked to new product development, with generative learning being regarded as critical to innovation (Senge 1990), and hence assisting product development. A strong market orientation was found to be positively related to new product development and ultimate product launching (Langerak *et al.* 2004a, 2004b). Kyriakopoulos and Moorman (2004) have also determined a positive link between market orientation and new product performance. Various studies suggesting that a learning organisation is perhaps a higher level than market orientation have been conducted (Baker & Sinkula 1999a, 1999b, 2002) and contend that a learning

orientation resource increases ability to effectively utilise a market orientation. Farrell (2000, p. 201) determined that 'a market orientation is positively related to a learning orientation and that a learning orientation has a stronger significant positive effect on business performance than does a market orientation'. McGuinness and Morgan (2005) consider that it is not simply a matter of implementing a market orientation onto a firm, but there needs to be a learning orientation within the firm. In other words, a combination of market orientation, learning orientation and organisational change capability is required to ultimately improve business performance. In a not-for-profit setting, a conceptual paper by Murray and Carter (2005) proposes that a learning capacity within not-for-profit organisations will assist improvement in marketing intelligence and that a culture of learning, plus individual as well as team training are suggested as methods to assist developing a market orientation.

Capability / responsiveness

Organisation 'capability' has been addressed by Day (1994) who contends that organisations that are better equipped to respond to the market and can anticipate changes in the marketplace will have superior profitability via long-run competitive advantage. Weerawardena and O'Cass (2004, p. 419) examined the characteristics of market-driven organisations and the antecedents to sustained competitive advantage and suggest 'that market-focused learning and marketing capability are critical capabilities shaping innovation-based competitive strategies in market-driven firms'. Likewise, it is suggested that to achieve superior performance, organisations need to develop a sustainable competitive advantage (Porter 1985). Similar to capability-based theory, Muthaly and Voola (2004) assessed market orientation from a resource-based view.

Pelham (2000, p. 48) considers the 'most influential market orientation elements are fast response to negative customer satisfaction information, strategies based on creating value for customers, immediate response to competitive challenges, and fast detection of changes in customer product preferences'. Similarly, Varela and del Rio (2003) assessed the time factor and determined that time related to speed of information collection and that dissemination was important, with a conclusion that in order to be market oriented, there was a need for organisations to not only exert themselves in regards to the quantity of information collected and quality of their decision, but they needed to be quick in both aspects.

No research regarding capability within not-for-profits was found during the review of literature.

Market planning

The relationship between the marketing planning process and market orientation has been researched by Pulendran, Speed and Widing (2003, p. 476) who determined that 'high quality marketing planning can lead to performance benefits, but as antecedent to a market orientation, rather than as an independent activity'. Similarly, Gounaris, Avlonitis and Pasastathopoulou (2004) suggest that four key aspects of an organisation's activities are influenced when it develops a market orientation. These aspects are the planning process, strategy formulation, strategy implementation and control. Coviello, Brodie and Munro (2000) found that small firms tend to have a more informal approach to market planning than larger firms and Sashittal and Jassawalla (2001, p. 45) consider that in smaller firms 'implementation emerges as an organisation's adaptive response to day-to-day market events that is

rarely scripted by plans'. Matthews & Scott (1995) have suggested that entrepreneurial SME's tend to engage in more sophisticated planning than less entrepreneurial SME's.

No research in relation to market planning in a not-for-profit context was found during the review of literature.

Relationships

Being close to the customer is a key factor in becoming a better performing organisation (Peters & Waterman 1984), and the marketing concept relates to developing a relationship with customers rather than simply making a sale (Webster Jr 1994a; 1994b). Tuominen, Rajala and Moller (2004) refer to the relationship with customers as 'customer intimacy' and Dalgic (1998, p. 57) developed a conceptual model of market orientation that emphasised the importance of customer relationship and stated that 'a market orientation ... is based on the relationship marketing concept'. Helfert, Ritter and Walter (2002, p. 1119) consider that the 'usefulness of the marketing orientation concept must ... be questioned when looking at the realities of business markets' and have added a relationship dimension to the often used market orientation framework and explored inter-organisational relationships and consider 'the overall market orientation of firms needs to be translated to a relationship level in order to be effective'. The traditional market orientation 'on the firm level' was translated into a market orientation 'on the relationship level'.

Market research / knowledge

The process of actually gaining competitive intelligence has been analysed by Jaworski, Macinnis and Kohli (2002) who consider there are three distinct phases to the competitive intelligence generation process – organising to get intelligence, searching for intelligence and then sense-making of intelligence. Javalgi, Martin and Young (2006) examined the role of market research in assisting global firms improve market orientation and developed a framework linking international services marketing research to market orientation and CRM. They consider market research to be inextricably linked to providing an organisation with relevant information to develop a market orientation. The importance of involving the entire organisation in intelligence generation was considered by Cravens, Piercy and Prentice (2000, p. 374) who caution that ‘market sensing is far too complex to rely only on top management’s perspectives as many others in the organisation are close to the market’, such as sales staff.

Darroch and McNaughton (2003) took the market orientation intelligence issue a step further, and consider knowledge-management capability as a distinctive capability for sustainable competitive advantage and suggest market orientation to be a subset of knowledge-management orientation.

In a not-for-profit context, Martinsons and Hosley (1993, p. 40) case studied a Hong Kong hospital and considered ‘information requirements for marketing decisions in this not-for-profit organisation are quite similar to those of profit-seeking enterprises’.

Cross-cultural

Mixed findings have been found regarding whether cultural factors affect the potential to develop a market orientation. Deshpande and Farley (1999) surveyed large Indian and Japanese firms and found that market orientation and corporate culture are key issues in determining organisational success and Deshpande, Farley and Webster (2000) found that there was no difference in the relationship between market orientation and business performance across countries. Likewise, in one of the first global assessments of market orientation, Cano, Carillat and Jaramillo (2004) conducted a meta-analysis utilising fifty-three existing empirical studies and concluded that there is a positive relationship between market orientation and business performance and that culture does not affect the relationship. These results indicate that market orientation is relevant in various countries, consistent with the borderless marketplace. Contrary to this research however, Deshpande and Farley (2004b) assessed how issues such as organisational culture, market orientation and innovativeness affect B2B organisation performances and found significant differences across countries in all variables studied and considered the differences generally reflect national cultures.

No research across cultures in a not-for-profit setting has been conducted.

Internal marketing / relationships within the firm

Internal employee factors can be a key issue in overall market orientation development. Whilst market orientation is seen as positive for organisations, some employees may attempt to prevent management implementing change to move

towards a more market-oriented position. These issues have been analysed by Harris (2002) in organisations that had recently introduced a market orientation. Rationales for employees resisting market-oriented change were determined to be - politically motivated to affect the authority of certain departments, due to perceived negative affects on resource availability, due to perceived prioritisation of market orientation issues over other issues, and exploitation of employees to achieve the new direction.

Naude, Desai and Murphy (2003) assessed internal market orientation and suggested local and direct management as well as socialisation and satisfaction were key contributors to internal market orientation whilst Harris and Ogbonna (2001) suggest that participative and supportive leadership styles were strongly linked with market orientation.

Lings and Greenley (2005) adapted the general market orientation concept to the employer-employee situation within an organisation and thus developed a measure of internal market orientation. Internal market orientation was conceptualised and confirmed by Lings and Greenley to include formal written information generation, formal face-to-face information generation, informal face-to-face information generation, information dissemination, and responsiveness to information. A high level of internal market orientation was found to not only assist business performance, but also improve staff morale. The authors indicate that internal marketing needs to be used in conjunction with external marketing to maximise an organisation's overall market orientation.

In research involving 1958 Canadian not-for-profit social service, community and arts organisations, Gainer and Padanyi (2005) determined that employee culture was a significant determinant in improving market orientation and hence performance.

Thus, for the development of an overall market orientation by an organisation, there is a need to develop a market orientation internally within an organisation as well as with external stakeholders.

Barriers

The actual implementation of the marketing concept is not considered straight-forward and has been hindered in some instances due to organisations having difficulty developing customer focus due to barriers such as an incomplete understanding of the marketing concept, conflict between short and long-term goals, top managements' own values and also failure to define markets in terms of customers (Webster Jr 1988). Similarly, Wong, Saunders and Doyle (1989) consider a key barrier to introduction of a market orientation is difficulty in attempting to change traditional thinking, self-interest of staff and lack of cooperation between functional units. Harris (1998) has determined seven categories of impediments to development of a market orientation, namely – apathy, little personal reward, limited power of shopfloor workers to make improvement decisions, short-term employment perspective of workers, compartmentalisation of job tasks, lack of marketing knowledge of workers and weak management support. These barriers are both people-focused as well as system-focused (Harris & Piercy 1999). Other reasons offered for non-achievement of market orientation include flawed measures of customer satisfaction, inappropriate customer complaint mechanisms, rejection of competitor threats and strategic inertia (Mason & Harris 2005).

Specifically in a small to medium enterprise context, impediments to development of a market orientation include narrow domains/compartmentalisation,

poor reward systems, formalised and structural barriers, ignorance of market orientation, limited resources, perceived inappropriateness, contentment with the current situation, a short-term focus, an unclear view of customers and a lack of competitive differentiation (Harris 1996b; Harris & Watkins 1998; Kippenberger 1998). Requirements for development of a market orientation in smaller organisations include structural connectedness, a service focused strategy, a cost focused strategy, internal communications, integration devices, marketing function controlled co-ordination systems, structural formalisation and structural centralisation (Harris 2000). Only one paper (Gainer & Padanyi 2005) regarding barriers to developing a market orientation in a not-for-profit setting was found during the review of literature.

Company structure

Kohli and Jaworski (1990) suggested that the structure of an organisation may impact on the implementation of a market orientation. Nwankwo, Owuso-Frinpong and Ekwulugo (2004, p. 129) found that having a 'customer service plan' had a positive influence upon market orientation, whereas having a 'customer service guarantee' did not. The researchers concluded this to be 'an issue of distinguishing between strategy (plan) and tactics (guidelines)'. Green, Inman, Brown and Willis (2005) analysed decentralisation, job specialisation, departmental integration and formalisation and concluded that only formalisation affected market orientation.

Age of firm

Perry and Shao (2002) postulated that the relative importance to firms of market orientation may vary between existing and new firms within an industry due to differing capabilities, whilst Tang, Wang and Zhang (2005, p. 67) found that 'years in business are positively associated' with business performance. Contrary to this, Becherer, Halstead and Haynes (2001) suggest years of operation were not significant.

Organisational goals

Goals are extremely important for all organisations. Based on a survey of small business owners, Blankson and Stokes (2002) found profitability to be important, but long-term objectives less important. O'Gorman (2001, pp. 71-72) suggests that growth for SME's is sometimes outside their direct control in that 'companies drive markets as well as markets driving companies'. These are key findings because whilst market orientation is generally regarded as being associated with improved business performance, differing organisations may use differing measures of business performance. Likewise, measures of business performance are often internally related to the company goals (such as growth over the previous three years), and do not take into consideration the relative performance of the firm compared to the industry as a whole.

In the not-for-profit sector, goals can vary dramatically from those of for-profit organisations. Whilst for-profit goals tend to be financially related, goals for not-for-profits (as well as financial goals related to donation levels), typically include

levels of volunteer recruitment. Harding (1998) considers that conflict of interest had a moderating affect on implementation of the marketing concept within not-for-profit organisations. More recently, Gainer and Padanyi (2002) considered there was sometimes suspicion about using business practices in not-for-profit organisations as they may divert the organisation away from its traditional mission and values - a clash of goals. Given the unique nature of not-for-profit organisations, Padanyi and Gainer (2004) examined the issue of 'multiple constituencies' (client and donor) and divided not-for-profit organisations into four clusters - client oriented (high/low) and funder oriented (high/low). Subsequently, they conducted research that they consider provides empirical evidence that the market orientation versus performance linkage 'can be extended to the nonprofit sector' (Gainer & Padanyi 2005, p. 860).

Size of firms

There is conflicting research regarding the affect of organisation size on market orientation in the for-profit sector. Becherer, Halstead and Haynes (2001) suggest that market orientation increases with company size, Liu (1995) considers that large firms tend to be more market oriented than medium sized firms and Wijewardena and Cooray (1995) suggest that relatively bigger small firms perform better than smaller firms. Contrary to these views, Pelham (2000) found a negative relationship existed between firm size and market orientation. Likewise, smallness may enhance the ability of smaller firms to exploit a market oriented organisational culture (Pelham & Wilson 1996), and being small can assist speed of implementation (Chen & Hambrick 1995). Opposing both these contrasting perspectives, size is considered irrelevant by other researchers (Blankson & Cheng 2005; Low 2005).

A similar conflict exists in not-for-profit organisation research, with Seymour, Gilbert and Kolsaker (2006) finding smaller charities to have the lowest level of market orientation whereas Balabanis, Stables and Phillips (1997, p. 599) measured adoption of the marketing concept in the top 200 British charities and concluded 'that larger organisations were more reluctant or able to become market oriented. Size was found to inhibit all three components of market orientation'.

Specifically in relation to SME's, care needs to be taken when considering research as the definition of SME varies across the globe. For examples, in China 'small' is regarded as less than 600 employees (Tang *et al.* 2005), 'small' is US\$12-\$200 million annual revenue (Pelham 2000), whilst Verhees & Meulenbergh (2004, p. 136) define 'small' as 'run and controlled by direct supervision of the owner'. In Australia, 'small' is defined by the Australian Bureau of Statistics as less than 20 employees, and medium as 20-199 employees (Australian Bureau of Statistics 2001). These definitional variations should be noted when reading research claimed to be related to SME's.

Early studies to examine market orientation in SME's included Peterson (1989) who determined the key reasons for not using a market orientation were because the needs of customers vary too much. This perhaps indicates the lack of marketing knowledge by SME operators regarding marketing issues, and the lower awareness (of the potential benefits) of market orientation that existed twenty years ago. The various research thrusts into marketing in SME's during the mid 1980's to early 1990's were found by Romano and Ratnatunga (1995) to be divided roughly equally between marketing as a culture, a strategy and as tactics.

Whilst a market orientation is relevant for organisations of all sizes, including SME's (Carson 1985, 1990; Carson & Gilmore 2000), lack of sophisticated

marketing is problematic for smaller firms (Cromie 1991) and often dependent on management capability (Hogarth-Scott *et al.* 1996; Liu 1995) and resources (Fuller 1994; Gilmore *et al.* 2001; Smith 1997). Perceived lack of resources can be overcome via collaboration (Beckett 2005), networking (Gilmore *et al.* 2001; Terziovski 2003) and use of University students (Ahmadi & Helms 1997; Brindley & Ritchie 2000; Sonfield 1981) as a low-cost labour resource.

Various industries

The vast majority of research relating to aspects of market orientation has been conducted in a range of private for-profit organisations. A few studies have been conducted in the public sector. For example, Caruana, Ramaseshan and Ewing (1997) determined a direct link between market orientation and organisational commitment within Australian State Government departments. Caruana, Ramaseshan and Ewing (1998) examined market orientation in Australian and New Zealand Universities and Cervera, Molla and Sanchez (2000, p. 1259) analysed market orientation in a local government setting and concluded that 'market orientation is shown to influence public organisation performance'. Also, Warnaby and Finney (2005) examined how the British Library adopted a marketing-oriented approach.

Some research, albeit limited has been conducted on not-for-profit organisations. For example, Sehorn (1995) found a positive link between market orientation and business performance in not-for-profit community service organisations, Jones (2000) examined market orientation within UK opera companies, whilst Gainer and Padanyi (2002, p. 182) examined arts organisations in Canada and determined that a market-oriented culture 'predicted a growth in resources and higher

levels of customer satisfaction'. Also, Harrison and Shaw (2004) assessed market orientation in a Victorian (Australia) library whilst Gainer and Padanyi (2005) examined the link between market orientation and culture in Canadian (social service, community support and arts) not-for-profit organisations and concluded that a client oriented culture and behaviour was important for organisational performance.

A summary of the research involved in examining the issues discussed in Appendix 2 is listed in Appendix 2: Table 1 overleaf.

Appendix 2: Table 1– Summary of Research Regarding Antecedents, Consequences and Moderators of Market Orientation.

Issues	Researchers	Potential Relevance To Charities
Innovation, entrepreneurialism, new product development, learning	Appiah-Adu & Singh (1998) Atuahene-Gima & Ko (2001) Baker & Sinkula (1999a, 1999b, 2002) Beverland & Lockshin (2004a) Bhaskaran (2006) Chaston (1997) Covin & Slevin (1988) Deshpande & Farley (2004a) Farrell (2000) Gatignon & Xuereb (1997) Han, Kim & Srivastava (1998) Hurley & Hult (1998) Keats & Bracker (1988) Kumar, Scheer & Kotler (2000) Kyriakopoulos & Moorman (2004) Langerak, Hultink & Robbin (2004a, 2004b) Lee & Tsai (2005) Matear, Osborne, Garrett & Gray (2002) Matear, Gray & Garrett (2004) Matsuno, Mentzer & Ozsomer (2002) Mavondo, Chimhanzi & Stewart (2005) McGuinness & Morgan (2005) Murray & Carter (2005) Salavou, Baltas & Lioukas (2004) Slater & Narver (1995) Wood, Bhuian & Kiecker (2000)	Improved revenue generation and service delivery
Capability / responsiveness	Day (1994) Muthaly & Voola (2004) Pelham (2000) Varela & del Rio (2003) Weerawardena & O’Cass (2004)	Capacity and efficiency

**Appendix 2: Table 1 (continued) – Summary of Research Regarding Antecedents, Consequences
and Moderators of Market Orientation.**

Issue	Researchers	Potential Relevance To Charities
Market planning	Coviello, Brodie & Munro (2000) Gounaris, Avlonitis & Pasastathopoulou (2004) Matthews & Scott (1995) Pulendran, Speed & Widing (2003) Sashittal & Jassawalla (2001)	Smooth operations
Relationships	Dalgic (1998) Helfert, Ritter & Walter (2002) Tuominen, Rajala & Moller (2004) Webster Jr (1994a; 1994b)	Assist market orientation
Market research / knowledge	Cravens, Piercy & Prentice (2000) Darroch & McNaughton (2003) Javalgi, Martin & Young (2006) Jaworski, Macinnis & Kohli (2002) Martinsons & Hosley (1993)	Assists market orientation
Cross-cultural	Cano, Carillat & Jaramillo (2004) Deshpande & Farley (1999; 2004b) Deshpande, Farley & Webster (2000)	Potential differences across countries
Internal marketing / relationships within the firm	Gainer & Padanyi (2005) Harris (2002) Harris & Ogbonna (2001) Lings & Greenley (2005) Naude, Desai & Murphy (2003)	Assists introduction
Barriers	Harris (1996b; 1998; 2000) Harris & Piercy(1999) Harris & Watkins (1998) Kippenberger (1998) Mason & Harris(2005) Webster Jr (1988) Wong, Saunders & Doyle (1989)	Potential numerous barriers to introduction of market orientation

**Appendix 2: Table 1 (continued) – Summary of Research Regarding Antecedents,
Consequences and Moderators of Market Orientation.**

Issue	Researchers	Potential Relevance To Charities
Company structure	Green , Inman, Brown & Willis (2005) Kohli and Jaworski (1990) Nwankwo, Owuso-Frinpong & Ekwulugo (2004)	Charity status
Age of firm	Becherer, Halstead & Haynes (2001) Perry & Shao (2002) Tang, Wang & Zhang (2005)	Life cycle
Organisational goals	Blankson & Stokes (2002) Gainer & Padanyi (2002; 2005) Harding (1998) O’Gorman (2001) Padanyi & Gainer (2004)	Competing goals
Size of firms	Ahmadi & Helms (1997) Balabanis, Stables & Phillips (1997) Becherer, Halstead & Haynes (2001) Beckett (2005) Blankson & Cheng (2005) Brindley & Ritchie (2000) Carson (1985; 1990) Carson & Gilmore (2000) Chen & Hambrick (1995) Cromie (1991) Fuller (1994) Gilmore, Carson & Grant (2001) Hogarth-Scott, Watson & Wilson (1996) Liu (1995) Low (2005) Pelham (2000) Pelham & Wilson (1996) Peterson (1989) Romano & Ratnatunga (1995) Seymour, Gilbert & Kolsaker (2006) Smith (1997) Sonfield (1981)	Size can affect operations

**Appendix 2: Table 1 (continued) – Summary of Research Regarding Antecedents,
Consequences and Moderators of Market Orientation.**

Issue	Researchers	Potential Relevance To Charities
Size of firms	Tang, Wang & Zhang (2005) Terziovski (2003) Verhees & Meulenberg (2004) Wijewardena & Cooray (1995)	Size can affect operations
Various industries	Caruana, Ramaseshan & Ewing (1997; 1998) Cervera, Molla & Sanchez (2000) Gainer & Padanyi (2002; 2005) Harrison & Shaw (2004) Jones (2000) Sehorn (1995) Warnaby & Finney (2005)	Market orientation relevant to charities

APPENDIX 3 - Services Marketing - Key Research Topics

Service Quality

A key issue in services marketing is service quality and as such has been the subject of perhaps the largest proportion of services marketing research. Whilst many researchers have examined services quality, it has been done in a for-profit environment with minimal research in the not-for-profit setting. Service quality is regarded as a key factor in delivering a high level of market orientation, but what constitutes service quality within a not-for-profit setting may vary considerably between the two distinct target segments of donors and clients. The requirement of quality may perhaps be less relevant for clients who may simply be happy to receive whatever is on offer.

Exactly what constitutes quality has been the subject of much conjecture. Maister (1984) and Zeithaml (1988) consider quality to be relative to what customers expect and what they receive, whilst Garvin (1984) suggests services that simply meet customer preferences can be regarded as being of high quality. Hoffman and Bateson (2002, p. 324) offer a definition of quality as an 'attitude formed by long-term, overall evaluation of a firm's performance'. Palmer (2001, p. 209) suggests the term 'quality' and 'satisfaction' are often used interchangeably. Most literature suggests service quality is an antecedent to customer satisfaction (e.g. Cronin & Taylor 1992; Parasuraman *et al.* 1985) but there is also some literature suggesting customer satisfaction is an antecedent to quality (e.g. Bitner 1990). Iacobucci, Ostrom & Grayson (1995) consider quality relates to managerial delivery, whilst satisfaction relates to customer experiences. Dabholkar (1993) suggests the various conceptualisations may all be valid but are based on different perspectives. In an effort to clear confusion, Zeithaml, Berry and Parasuraman (1993, p. 1) developed a

seminal model to clarify the ‘distinction between customer satisfaction and service quality ... by specifying 3 different levels of customer expectations ...’ namely, desired services, adequate service and predicted service.

Five key service quality models have been developed (Dagger & Lawley 2003, p. 79) - disconfirmation of expectations (Oliver 1981); the Nordic model whereby service experience is divided into technical quality (outcome) and functional quality (during delivery); the seminal SERVQUAL and Gaps model (Parasuraman *et al.* 1991b; Parasuraman *et al.* 1985, 1988; Zeithaml *et al.* 1988) where the level of quality is viewed as the gap between expected and actual service and also identifies five gaps with SERVQUAL measuring the quality of Gap 5 which is the difference between a customer’s expected and perceived quality; a three-component model (Rust & Oliver 1994) suggesting three components, namely service product, delivery and environment; and finally, an integrated model (Brady & Cronin 2001) based on the above-mentioned four models and containing three tiers - overall perception, dimensions of evaluation and sub-dimensions. An alternate method of measuring service quality includes utilisation of a systems approach whereby input quality, process quality and output quality are measured (Johnson *et al.* 1995).

The SERVQUAL model is the most widely used measure of quality in services marketing and has been found to be appropriate in various settings by numerous researchers (e.g. Brensingher & Lambert 1993; Chenet *et al.* 2000; Clow *et al.* 1996; Espinoza 1999; Farley *et al.* 1990; Ford *et al.* 1993; Lam & Woo 1997; Lee M & Ulgado 1997; Mersha & Adlakha 1992; Pitt *et al.* 1995, 1997; Powpaka 1996; Stafford *et al.* 1998; Sultan & Simpson Jr 2000; Thwaites 1999; Young & Varble 1997; Zeithaml *et al.* 1996).

Despite its popularity, SERVQUAL has been criticised for various reasons (Baron & Harris 1995; Brown & Swartz 1989; Haywood-Farmer & Stuart n.d.; Johnston 1997; Johnston *et al.* 1990; Lewis *et al.* 2001; Llosa *et al.* 1998; Mels *et al.* 1997; Palmer 2001; Spreng & Singh 1993; Teas 1993, 1994; Van Dyke *et al.* 1997). Typical criticisms of SERVQUAL, for example, are that expectations can only be based on previous experiences, and the timing of the survey immediately after the service delivery may give differing results for expectations than if the expectations section is completed prior to the service delivery, with Buttle (1996a, p. 10) claiming ‘there is little evidence that customers assess service quality in terms of’ perceived quality minus expected quality gaps. Brown, Churchill and Peter (1993, p. 127) suggest ‘there are some serious problems in conceptualising service quality as a difference score’ Cronin and Taylor (1992) hold similar views.

Despite being initially designed to offer a generic measure for any service, validity of SERVQUAL across specific industries has been questioned (Babakus & Boller 1992; Carman 1990; Finn & Lamb Jr 1991; Gagliano & Hathcote 1994; Genestre & Herbig 1996; Orwig *et al.* 1997) and some of the criticisms of SERVQUAL led to development of SERVPERF that assesses post-consumption perceptions only. SERVPERF does not assess expectations and is justified because customers’ expectations often change after receiving a service. Various researchers have suggested that SERVPERF outperforms SERVQUAL (Cronin & Taylor 1992, 1994; Lee *et al.* 2000; Quester & Romaniuk 1997). Adding to the controversy, Lassar, Manolis and Winsor (2000) compared SERVPERF and the Grönroos (1990) developed Technical/Functional Quality measures of service quality and found that the Grönroos approach was more reliable. Parasuraman, Berry and Zeithaml (1993;

1994a; 1994b; 1994c) subsequently made various refinements in response to some of the criticism of SERVQUAL.

Issues regarding SERVQUAL have led to customisation resulting in claims of more reliable and valid measures (Babakus & Mangold 1992; Frost & Kumar 2000; Johns & Tyas 1996; Kang 1999; Kettinger & Lee 1997; Kettinger *et al.* 1995; Pitt *et al.* 1992; Tang K M & Bougoure 2006).

Most of the research regarding SERVQUAL has been conducted in a for-profit setting but Vaughan and Shiu (2001, p. 131) contend that the SERVQUAL model also 'is inappropriate for services that [have] no close analogue with the private sector'. Based on assessment of service provision by employees in the voluntary sector in Scotland they modified SERVQUAL to develop ARCHSECRET - a measure of service quality tailored for this specific sector. In regards to charities, this model may be useful for charities that rely on a high number of voluntary employees, but it only assesses quality delivered to clients, and does not assess quality delivered to donors.

Despite the apparent shortcomings of SERVQUAL it 'seems to be moving rapidly towards institutionalised status' (Buttle 1996a, p. 25) and is the most widely used measure of service quality. As well as issues regarding what measure of service quality should be used, other aspects of service quality measurement have included the need to assess both customer and supplier perceptions (Pisharodi 1992), whether customers have had prior experiences or are receiving a service for the first time (Bolton & Drew 1991; Johns & Tyas 1997) as well as the assumption that customers' perceptions and expectations change over time (Boulding *et al.* 1993; Storbacka *et al.* 1994). Whilst organisations should measure service quality within their own organisation, it has been suggested (Brown T 1997) that organisations also need to

compare themselves with competitors. In other words, achieving a high rating from your customers is not satisfactory if your competitors achieve an even higher score.

Summarising service quality literature, Johnston (1995a) considered there were five key issues being debated regarding service quality – firstly, the similarities and differences between service quality and satisfaction (e.g. Cronin & Taylor 1992, 1994; Parasuraman *et al.* 1988; Zeithaml *et al.* 1993) with some consensus that satisfaction relates to the encounter and quality is a customer's overall relative impression of the organisation; secondly, the appropriateness of the expectation-perception gap model, with some support for use of performance-based measures instead (e.g. Babakus & Boller 1992; Cronin & Taylor 1994); thirdly, models regarding how the perception gap arises (e.g. Parasuraman *et al.* 1985); fourthly, the definition and use of the term 'zone of tolerance' with the suggestion that customers will accept quality within a range (e.g. Berry & Parasuraman 1991); and fifthly, the determinants of service quality (e.g. Parasuraman *et al.* 1988).

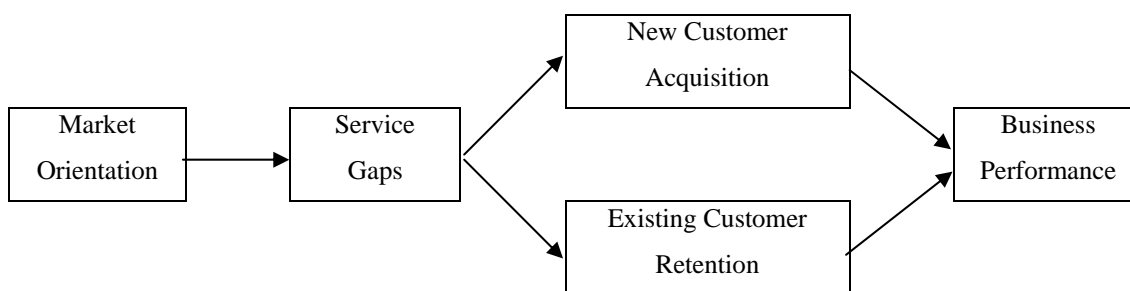
Whilst service quality is widely measured, Roberts, Varki and Brodie (2003) suggest measurement of relationship quality 'is a better predictor of behavioural intentions than service quality' (p. 169) because 'service quality ... seeks to measure firm performance along transactional dimensions, whereas relationship quality emphasises the intangible aspects of on-going interactions over one-off encounters' (p. 181). Whether charities should measure service quality or relationship quality may be dependent upon whether the clients are perceived as short-term or long-term – this could perhaps be dependent upon the type of services offered by the various charities.

A high level of market orientation is regarded as needed to enable a high level of service quality (Chang & Chen 1998), that is, market orientation comes before service quality. Patterson, Johnson and Spreng (1997, p. 4) suggest that customer

satisfaction or dissatisfaction ‘is arguably at the core of the marketing concept’ and that there is a ‘very strong link between satisfaction and repurchase intentions...’ This is also relevant in the not-for-profit arena, particularly for donors but potentially less relevant for clients who may be happy to receive whatever assistance they can and will not be overly evaluative of the quality of service.

Market orientation and service quality are intertwined, and based on the comments by Buttle (1996a, p. 25) that SERVQUAL is ‘moving rapidly towards institutionalised status’, SERVQUAL in an appropriate form could assist organisations to measure the service component of market orientation.

Linking the market orientation versus business performance association in a services context via use of the service gap concepts, Guo (2002, p. 1158) in a purely conceptual paper suggested that the level of market orientation affected the level of service gaps which, in turn, affected customer retention and acquisition as shown in Appendix 3: Figure 1 below.



Appendix 3: Figure 1 - *Market Orientation and Service Gaps* (Guo 2002, p. 1158).

It is generally accepted that a level of market orientation has a direct relationship to performance and a number of different research projects have investigated the relationship between service quality and profitability. Both positive and negative linkages have been found (Zeithaml 2000) and this perhaps suggests

that, in some cases, managers are over-delivering (at added cost hence reduced profitability) without gaining an increase in customer volume to offset the extra costs. This is an interesting issue that has high relevance to the not-for-profit sector where there is typically a shortage of resources - how much service is enough?

Service encounters / experiences

The term 'servicescape' can be defined to be 'the built environment surrounding the service' (Bitner 2000, p. 37) with the aesthetic value of the servicescape playing a key role in marketing a service (Donovan & Rossiter 1982; Foxall & Greenley 1999; Wagner 2000), and impacting on 'both customers and employees' (Bitner 1992, p. 57).

Other relevant issues in the service encounter include non-verbal communication such as body language (Gabbott & Hogg 2000) and efficient delivery to save time and energy for customers (Seiders *et al.* 2000). Thus, managers need to understand the entire customer experience to ensure high quality service delivery. Linked to this, Little, Motion and Brodie (2006), consider that at a front-line level, issues such as ready availability have an influence on value-creation and hence service quality and satisfaction.

The servicescape forms a major factor in assessing the relevant discourse. In the not-for-profit arena, the servicescape can perhaps be of greater importance to differing target groups and is perhaps of less importance to clients who may be grateful for whatever services they can receive.

Service design & delivery

Grönroos (1990) considered the western world was experiencing a '*service economy*' during the late 1980's and that there was a need to ensure all aspects of an organisation are operating correctly, particularly when a 'moment of truth' occurs. A moment of truth being defined as interactions either directly or indirectly by a customer with the various resources of a service organisation. In a seminal article, Shostack (1985) espoused the idea that interaction between the service provider and the recipient must be thoughtfully managed and a technique of 'blueprinting' was offered to analyse and map all aspects of the service process. Haywood-Farmer (1988) considers service delivery comprises three elements – physical process, people's behaviour and professional judgement. Control over the service delivery process is important (Bateson 2000) and waiting for service delivery can be an issue (Hoffman & Bateson 2002; Taylor & Fullerton 2000), with an aim for ensuring seamless service occurs 'without interruption, confusion or hassle to the customer' (Hoffman & Bateson 2002, p.414).

Efficient service delivery requires 'an ongoing commitment' from management (Watson R T *et al.* 1998, p. 61) as well as trust, commitment and integration of co-operation across functions (Chenet *et al.* 1999; Gilbert & Parhizgari 2000; Johnston 1995b; Longenecker & Scazzero 2000; Lovelock 2000), including a 'Service Management Trinity' (Lovelock *et al.* 2004, p. 24) comprising operations management, human resources management and marketing management combining together. This is reinforced by Pitt, Berthon and Lane (1998) who identified the cause of service delivery gaps to be due to role ambiguity, role conflict, poor employee/technology job fit, lack of perceived control and lack of teamwork.

Involvement of customers in service delivery can be assisted via use of modern technology (Fisk 1999) with utilisation of self-service where relevant (Corby & Mercier 1995) although care needs to be taken to ensure no unanticipated and unintended effects on relationships with customers (Barnes *et al.* 2000).

In line with the trend towards a service-dominant logic (Vargo & Lusch 2004a) and the concept of value, the customer becomes a key component in the development of value (Payne *et al.* 2006). Associated with this is the concept of ‘customer engagement’ with the customer potentially engaged on up to three levels - physical, emotional and cognitive (Patterson & Yu 2006). Thus, both ‘employment engagement’ and ‘customer engagement’ can affect service quality. This can have issues in the charity context where there are two distinct types of target customers – donors and also recipients of the charities’ services. Donors may simply want minimal physical engagement, but maximum emotional engagement in the discourse. Whilst efficient service delivery is likely to be relevant when clients are paying for services, issues of services delivery in the not-for-profit environment are likely to be important to donors, but perhaps of less importance to clients who may simply be grateful to receive assistance.

Internal Marketing

As previously noted, employees are a key component in service provision within a market-oriented organisation. ‘The role of employees in service encounters cannot be over-stated ... interaction between employees and customers is a prime determinant of the customers’ perceptions of service quality’ (Lewis & Gabrielsen 1998, p. 86) and ‘quality of service is more than a set of activities: it is, in the final

analysis, primarily an attitude' (Berry *et al.* 1988, p. 43). Similarly, 'all employees [should] make satisfying customers their goal' (Albrecht 1985, p. 64).

Internal employees are thus a key factor in service delivery. Competence is regarded as required for high level service delivery (Eriksson *et al.* 1999), as is organisational commitment, work group socialisation and empowerment (Hartline *et al.* 2000). Homburg and Pflesser (2000) consider that development of a market-oriented culture amongst employees requires not only establishment of norms (e.g. openness of communication, empowerment) but also relevant artefacts (e.g. rituals).

Whilst the internal employees are required to 'buy-in' to the need to deliver a marketing discourse, employees may have differing views of service encounters than customers (Bitner *et al.* 1994) whilst Berry and Parasuraman (1997) suggest firms need to listen to three types of customers – a firm's external customers, competitors' customers, and also internal customers (employees).

The need to market to internal employees is seen as highly appropriate in assisting development of a high quality of service as a key component of a marketing discourse and this can have issues in the not-for-profit sector where there is often a high reliance on volunteer staff, particularly part-time employees whom are likely to spend less time per week at the charity and have differing motivations to paid employees.

Relationship Marketing

History & Definition

Sheth and Parvatiyar (2000a) consider that perspectives regarding relationships in marketing emerged in the 1950's when McGarry raised issues of cooperation and interdependence, followed in the 1960's when Alderson discussed

inter and intrachannel cooperation. Levitt (1983) wrote a seminal article, appropriately titled 'After the Sale is Over' in which he suggested that emphasis needed to shift from the sale, to development of on-going satisfaction after the sale because the key value of the customer/supplier relationship occurred after the sale. A body of research questioned traditional marketing theory that had been developed from large consumer markets in the United States - and that the short-term transactional focus was inappropriate when longer-term relationships were critical to success (Payne *et al.* 1998).

Subsequently, originating in the 'industrial and services marketing literature of the 1980s' (Christopher *et al.* 2002, p. x), the term 'relationship marketing' first appeared in services marketing literature (Aijo 1996) in a seminal article by Berry (1983, p. 25) in which relationship marketing was defined as 'attracting, maintaining, and – in multi-service organisations – enhancing customer relationships'. Alternate definitions include Grönroos (1990) defining relationship marketing as the establishment, maintenance and enhancement of relationships with customers and other partners at a profit so that the objectives of both parties are met. Similarly, Sheth and Parvatiyar (2000b, p. 121) define relationship marketing as *'the ongoing process of engaging in cooperative and collaborative activities and programs with immediate and end-user customers to create or enhance mutual economic value at reduced cost'* and Gummesson (2002, p. 587) defines relationship marketing as 'marketing based on interaction within networks of relationships'. The definitions of Grönroos (1990) and Sheth and Parvatiyar (2000b) relate specifically to for-profit organisations and would require refining for a not-for-profit setting.

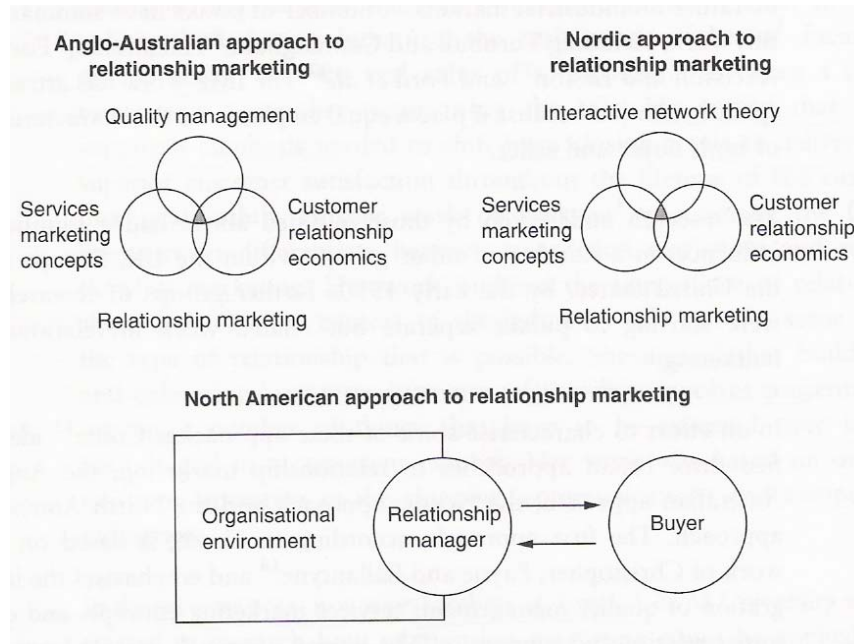
Once the needs of clients of a charity have been addressed, it is perhaps likely that the clients would not want a continuing relationship with the charity. Whilst the

issue of relationship marketing is a key factor within a marketing discourse within the for-profit sector, it is likely to need some form of modification if it is to be relevant within the not-for-profit sector.

Various Approaches

Coote (1994), as cited by Christopher, Payne and Ballantyne (2002, p. xi) 'identified three broad approaches to relationship marketing', firstly, the Anglo-Australian approach emphasising 'integration of quality management, services marketing concepts and customer relationship economics' (e.g. Christopher *et al.* 1991, 2002; Payne 2000; Payne *et al.* 1998); secondly, the Nordic approach based around 'interactive network theory of industrial marketing, services marketing concepts and customer relationship economics'; and thirdly, the North American approach which 'emphasises the relationship between the buyer and seller ...' (e.g. Berry 1983; Bitner 1990; Levitt 1983; Parasuraman *et al.* 1985). These three approaches are indicated in Appendix 3: Figure 2 overleaf.

A commonality amongst two of these approaches is the use of services marketing concepts. Whilst these perspectives of relationship marketing are relatively broad, some more narrower perspectives consider relationship marketing to simply be data-base marketing (Revolution 1992), customer retention (Vavra 1992) or development of one-to-one relationships (Peppers & Rogers 1993, 1999).



Appendix 3: Figure 2 - Domain of Relationship Marketing – Alternative Schools

Coote (1994) cited in Christopher, Payne and Ballantyne (2002, p. xii).

Relationships with Whom and Why?

There is a need for organisations to develop relationships not just with external customers, but with a range of other key markets including internal markets (employees), referral markets, influence markets, recruitment markets, supplier/alliance markets and investors (Buchanan & Gillies 1990; Christopher *et al.* 2002; Gummesson 1994, 1999; Reichheld 1994).

The key reason for organisations to develop relationships with customers is because it is normally 'much more profitable to retain existing customers than continually seeking to recruit new customers to replace lapsed ones' (Palmer 2001, p. 115). Customer retention is a key aim of relationship marketing (Parasuraman *et al.* 1988) and components of a good relationship include concern, trust, commitment (Moorman *et al.* 1992; Wilson 2000) and service (Buttle 1996b).

Generally, people only form relationships if they consider it to be beneficial. The concept of exchange theory is a key to whether a relationship of sorts will develop (Bhattacharya & Bolton 2000) and customers must perceive value to continue the relationship (Ravald & Grönroos 1996). On a one-to-one level, Gremler and Gwinner (2000, p. 99) suggest rapport is 'particularly influential in situations where the customer has repeated interactions with the same person' and from a network perspective, Achrol and Kotler (1999, p. 146) consider that marketing 'outcomes increasingly are decided by competition between networks of firms rather than by competition among firms', thus suggesting that organisations are likely to want to develop relationships not only with their direct customers, but with a range of organisations in their broad network. This can have implications in the not-for-profit arena, particularly for smaller not-for-profit organisations that may lack resources and potentially benefit from mutual sharing of common resources such as information technology infra-structure.

Although commitment is a key aim in relationship development, Diller (2000) questions how committed customers actually are to developing a relationship. Issues of commitment and value exchange raise particular ideas for investigation within the charity sector. Do donors want an ongoing relationship? Indeed, do they have the financial resources to offer ongoing donations? Similarly, in regards to the clients of charities, do the clients want an ongoing relationship or do they simply want a more transactional-based approach to address their needs?

Internal marketing

Gummesson (1991) considers that everyone within an organisation needs to be a part-time marketer and that marketing is not simply confined to the full-time marketers within the marketing department. For an effective marketing discourse to develop, it is thus necessary to involve all employees.

A *‘thorough and ongoing internal marketing process is required to make relationship marketing successful’* (Shajahan 2004, p. 247) and similarly, Batterley (2004, p. 5) considers relationship marketing involves ‘all the resources of an organisation in a holistic business strategy aimed at achieving a greater engagement of all key stakeholders in the business ...’ with Gummesson (1987b) regarding every employee to be an internal customer of someone else, thus forming internal customer relationships.

The need for appropriate internal marketing has been examined by various researchers including Schneider (1980), Ogbonna & Wilkinson (1990), Gummesson (1987a), Bowen and Lawler (1992), Schlesinger and Heskett (1991), Grönroos (1990) and Berry and Gresham (1986).

Not only is internal marketing a key factor in service delivery and relationship development via paid employees, but the reliance on volunteer staff by many charities provides a complicating factor requiring consideration.

Need for information

The ‘synthesis dimensions of market orientation’ (Lafferty & Hult 2001, p. 100) highlight that information is important to enable development of a marketing discourse. The development of relationships requires a strong information system and

the key to a company delivering quality service is based upon its ability to collect, process and distribute information (Berkley & Gupta 1995). A customer retention plan is seen as paramount to relationship development (DeSouza 1992; Ronsenberg & Czepiel 1984) and involves analysis and acting upon information.

Range of relationship marketing research

Relationship marketing research has progressed over the years and has been studied in a range of contexts. Examples of these contexts include - networks (Anderson *et al.* 1994), strategic alliances (Cravens & Cravens 2000; Sheth & Parvatiyar 2000c; Varadarajan & Cunningham 2000), buyer/seller partnerships (Dwyer *et al.* 1987; Wilson 2000), channel relationships (Ganesan 1994; Mentzer 2000; Weitz & Jap 2000), sales management (Swan & Nolan 1985), member organisations (Gruen 2000), affinity partnerships (Swaminathan & Reddy 2000), key account management (Cannon & Narayandas 2000) as well as relationship marketing programs types (Sheth & Parvatiyar 2000a).

All this research has been conducted in for-profit settings.

Relevance of Relationship Marketing to Not-for-profit Charities?

MacMillan, Money, Money and Dowling (2005, p. 816) consider that there 'are few academic empirical studies that apply relationship marketing to the NPO sector'. One of these studies is by Bennett (2005) who found a link between the levels of market orientation, relationship marketing and client satisfaction in a study of 172 UK charities. Bennett (2005, p. 464) thus stated that 'market orientation and the adoption of relationship marketing are forces for good in the helping and caring

charity world, and thus need to be encouraged. Charity managers should be knowledgeable about these concepts and be competent to apply them in practice’.

Dependent upon the nature of the charity, it could be argued that relationship marketing is definitely important in regard to donors, but perhaps less important in regard to clients – specifically if it is a charity that assists people to recover from illness. An interesting concept worth investigation is the potential conversion of clients, once ‘recovered’, to become donors.

APPENDIX 4 – Interview Protocol

Interview Questions for - Charity Employees

YOUR ROLE

1. What is ***your role*** in the organisation and how long have you been with the organisation?
2. What does your job entail?
3. What is your background? (training, previous employment etc.)
4. Tell me about the ***current purpose*** of your organisation.

MACRO-CHANGE

1. How would you describe a ***‘traditional’ old fashioned charity***?
2. What do you see as the ***key differences*** between a non-profit charity and a for-profit business organisation?
3. Can traditional charities survive in this day and age? If not, how do they ***need to change***?
4. What ***changes have management introduced*** here in recent years and what has been the effect? What ***caused*** these changes?
5. How did the existing ***staff feel*** about these changes occurring?
6. ***Can you tell me a story about when “the changes were positive”, “the changes raised problems” – i.e. yo u got resistance.***
7. What are the ***key differences*** between the organisation now, compared with say 5 years ago before various marketing techniques were introduced?
8. What does the word ‘marketing’ mean to you?
9. What happens when you talk about ‘marketing’ in your organisation. What is the reaction of staff?
10. Has the way you ***talk*** about the organisation changed? E.g. ***Has the language changed***
11. When various new commercial practices were introduced – how did you feel about these?
12. How is the ***‘performance’*** of the organisation ***‘measured’***?

ORGANISATIONAL IDENTITY & BRANDING

1. What changes if any have there been in branding of your organisation and how do you ***promote*** your organisation?

STAKEHOLDERS

1. What sort of ***rewards do employees receive/want? & does it vary between paid and volunteer staff ?***

MICRO (Market orientation)

Importance of information

1. How does your organisation ***gather information*** regarding competitors, potential and current donors as well as clients?
2. To what extent is ***information analysed and shared*** within your organisation?
3. How well is information and decisions communicated within the organisation?

Emphasis on customer

1. How important is the client to your organisation?

Interfunctional co-ordination

1. Does your organisation operate in a ***highly departmentalised fashion?*** How well do different departments get on?
2. Are different departments willing to consider and discuss ideas from other departments?
3. ***How much communication (both formal and informal) is there between departments?***
4. ***Is decision-making centralised or de-centralised?***

Taking action

1. Have your service delivery methods and measures of quality changed in recent years? And, if so, in what ways?

Final questions –

1. Can modern marketing methods used by for-profit companies ***be used by charities?***
2. What makes charities successful? What do they do well – or not do well?
3. What are the characteristics of a successful charity?
4. How would you describe/interpret success for the organisation?
5. ‘Growth’ is there a limit? Or is all growth good?

APPENDIX 5 - Quality Checklists

Appendix 5: Table 1 - Checklist for Quality Assurance of Case Study Research (Gummesson 2007).

(1) Readers should be able to follow the research process and draw conclusions of their own:

- well written, intelligible report
- a comprehensive account of the research process
- a statement of the problem, purpose and research questions of the study
- a description of methods of data collection, coding, analysis and interpretation procedures
- a well documented and rich description of cases
- motives for the selection of cases
- limits of the research project
- clear presentation of results and conclusions
- information to the reader if taboo information has been discovered but is made anonymous or disregarded.

(2) As far as realistically feasible researchers should present their paradigm and pre-understanding:

- personal and professional values and if these have changed in the course of the research
- values of the system under analysis
- theories and concepts that govern the project together with the reasons for the choice of these theories and concepts
- the researcher's prior experience and other pertinent information on the researcher.

(3) The research should possess credibility:

- correct data including correct rendering of statements and views of informants
- how analysis and interpretation are supported by data
- demonstrated confidence in the theory, concepts and conclusions that are used or generated in the research
- honest presentation of alternative interpretations and contradictory data
- the avoidance of deliberate or unintentional deception
- the conclusions should accord with one another (internal logical consistency)
- the actors in the cases should be able to recognize what is presented in the report (external logical consistency)
- presentation of all relevant data and information used in the case study
- selected methods and techniques should be appropriate to the problem, purpose and research questions.

(4) The researcher should have had adequate access:

- used methods and techniques that ensured adequate access to the processes under study
- account of any difficulties in deploying desired access methods
- account of any problems and limitations which arose through denied access
- account of any problems and limitations in access which arose through time and money constraints
- how access limitations have possibly impaired the research.

(5) An assessment on the generality and validity of the research:

- to what areas the results apply
- how closely the research represents the phenomenon which the researcher aimed to study
- if other research confirms or disconfirms the findings
- if results bear out or disagree with extant theories and concepts.

(6) The research should make a contribution:

- contribute to increased knowledge
- deal with relevant problems
- optimize the trade-off between methods, techniques and results
- be of value to the scientific community, the client, and the public
- actively be made available to the scientific community, the client, and the public.

Appendix 5: Table 1 (continued) - Checklist for Quality Assurance of Case Study

Research (Gummesson 2007).

<p>(7) The research process should be dynamic:</p> <ul style="list-style-type: none"> the extent to which the researcher has continuously learnt through own reflection and dialogue with others demonstrated creativity and openness to new information and interpretations the ability to switch between deep involvement and distance a demonstrated awareness of changes of research design, methods application and so on during the research process. <p>(8) The researcher should possess certain personal qualities:</p> <ul style="list-style-type: none"> commitment to the task of research integrity and honesty, being able to voice his or her conviction flexibility and openness, being able to adjust to changed conditions and new – even disturbing – information.
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Appendix 5: Table 2 - Strategies to Check Accuracy of Qualitative Research Findings

(adapted from Creswell 2003, pp. 196-197).

Strategy	Frequency of Use	Ease of Implementation
<i>Triangulation</i>	HIGH	EASY
<i>Member-checking</i> – check written report with participants to determine if they feel the data is accurate		
<i>Rich, thick description</i> – makes it easier to convey data		
Clarify the <i>bias</i> the researcher may bring to the research		
Ensure discussion of any <i>negative</i> or <i>discrepant</i> information		
Spend <i>prolonged time</i> in the field to increase understanding		
<i>Peer debriefing</i> – allows a third party to review and query the research to ensure the research resonates with other people	LOW	DIFFICULT
<i>External auditor</i> – is new to the researcher		