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An exploration of the relationship between strategic renewal and occupational identity

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Graduate Program in Business
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Abstract

Strategic renewal research focuses on what activities organizations need to engage in and how these activities need to be organized for successful renewal. During periods of strategic renewal the only certainty is that organizational activities will change, often substantially. Activity change is a challenge for organizations with occupations embedded within them as the activities of members are closely tied to the occupation and the identity of these occupational members (Pratt, Rockmann, & Kaufmann, 2006). In spite of the close link to activities, the current research on strategic renewal does not consider the important influence occupational identity has on this process both for the organization and for the occupational members within the organization. My one-year theory elaborating qualitative dissertation at NatNews, a Canadian media organization, examines the relationship between strategic renewal and occupational identity by addressing the question: how are strategic renewal and occupational identity related?

There are three key findings emerging from my analysis with deep implications for strategic renewal. First, I find that the beliefs and values forming the foundation of occupational identity conflict. The flexibility in belief enactment has mixed effects and occupational identity can both help and hinder strategic renewal.

Second, I isolate two mechanisms linking strategic renewal and occupational identity - meaning and metrics. The meanings associated with activities can be challenged or reinforced as activities are enacted during the strategic renewal process. Building on the work of Plowman et al.(2007) who link feedback to activity adaptation, my findings also

highlight that the visibility of metrics impact the connection between strategic renewal and occupational identity. Positive feedback metrics that are only visible to some members can hinder activity change.

Finally, I provide compelling evidence that the focus of strategy research on the functional aspects of activities, or what to do and how to do it, is necessary but insufficient to capture the role activities play in organizations during strategic renewal. My findings reveal that activities are repositories for beliefs, values and meanings. These aspects are of equal importance to the functional aspects as they are directly tied to the behavior of those enacting the activities.

Keywords

Strategic renewal, occupational identity, occupational beliefs, flexible enactment, qualitative, activities, journalism

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Chapter 1

1 Introduction

“Within organizational fields, members of occupational associations are substantive actors who affect organizational environments through their professional activities” (Bechky, 2011, p. 1158).

Organizations facing challenges to traditional business models engage in strategic renewal to survive and compete (Albert, Kreutzer, & Lechner, 2015; Danneels, 2010; Floyd & Lane, 2000). There is a rich body of work examining strategic renewal creating an important foundation for scholars and practitioners. Strategic renewal research addresses two primary questions: what must organizations do to successfully engage in strategic renewal and how do organizations accomplish this? A commonly used definition in strategic renewal research reinforces this focus; “Strategic renewal is the refreshment or replacement of attributes of an organization that have the potential to substantially affect its long-term prospects” (Agarwal & Helfat, 2009, p. 282). Consequently, there is little attention paid to elements of strategic renewal beyond the external alignment and internal fit questions driving the research agenda.

External alignment and internal fit are essential components to understanding strategic renewal, but recent research adopting social and cognitive views call into question the traditional assumptions of organizational control and member homogeneity (e.g. Balogun & Johnson, 2004; Balogun & Johnson, 2005; Jarzabkowski, Kaplan, Seidl, & Whittington, 2015). As my opening quote suggests, a variety of stakeholders perform activities during the strategic renewal process and members of occupations are one of

these groups. During periods of strategic renewal, activities will change, presenting a unique challenge for organizations with large populations of occupations such as engineers, journalists, doctors and professors. Occupational identity is intimately intertwined with established occupational activities and expertise (Pratt et al., 2006). The foundation of occupational identity, the convergence of ‘who we are’ and ‘what we do’ is formed at the nascent stages of an occupational members’ career via intense socialization (Pratt et al., 2006). As a result, occupational membership plays a substantial role in determining the skills or work of its members in organizations (Bechky, 2011; Chreim, Williams, & Hinings, 2007; Nelson & Irwin, 2014) and sits in contradiction with the basic assumption in strategy research that organizations are in control of resources and activities (Albert et al., 2015; Pfeffer & Salancik, 2003).

Organizations and occupations themselves change and adapt over time (Chreim et al., 2007; Nelson & Irwin, 2014; Van Maanen & Barley, 1984). Given the close reliance on activities both for organizations and occupational members, research is needed to understand how strategic renewal and occupational identity are related. Occupational identity impacts the overall actions and behaviors of members in organizations (Bechky, 2011), but also influences interpretation and adoption of new stimuli such as technological changes (Nelson & Irwin, 2014). Furthermore, research on occupations focuses on resistance and the adversarial relationship between occupations and organizations as they vie for control over activities (Abbott, 1988; Van Maanen & Barley, 1984). In spite of the centrality of occupations in organizations, strategy researchers rarely discuss the unique aspects of occupational members and occupations

are treated as part of the context in studies of strategic renewal (e.g. Nag, Corley, & Gioia, 2007).

During strategic renewal, members of occupations within organizations must reconcile their occupational identity and activity enactment with organizational changes to activities. Currently, there is no empirical research providing guidance for those managing these tensions, or for researchers studying the mechanisms involved in the strategic renewal process. My dissertation research attends to this gap by addressing the following question: *How are strategic renewal and occupational identity related?* To explore this question I engage in a one-year qualitative study at NatNews, a Canadian media organization. For reasons I explain further in my methodology section (Chapter 3), NatNews is an ideal setting to explore my research question as it is actively engaging in the strategic renewal process. Additionally, a large portion of those who work at NatNews are members of the journalism occupation, providing an ideal setting to bring these two separate streams of research together.

There are three key findings in this dissertation with implications for strategic renewal. First, by analyzing the work of editors and reporters at NatNews I highlight that the beliefs and values forming the foundation of their occupational identity conflict. As opposed to being something to overcome, the conflict provides an essential balance in the daily work of editors and reporters as they resolve these tensions. Beliefs and values provide a ‘toolkit’ to guide behavior within acceptable guidelines, not a rigid ideology to be adhered to. In other words, these beliefs and values are enacted in flexible ‘strategies of action’, thus calling into question the focus on rigidity and resistance commonly assumed in studies involving occupations.

Second, the flexible enactment of beliefs and values means that occupational identity both helps and hinders strategic renewal. The relationship between strategic renewal and occupational identity is mediated by two mechanisms: meaning and metrics. I draw on findings in the sensemaking and meaning of work literatures to explore how meaning acts as a mechanism. My findings deviate from these literatures by focusing less on the creation of meaning and more on how meaning enables reporters and editors to reconcile tensions. I also identify metrics as a key mechanism linking strategic renewal and occupational identity. The importance of metrics during strategic renewal builds on the foundational work of Plowman et al. (2007) who illustrate how feedback is essential for activity change by highlighting the importance of visibility of metrics. My findings show that feedback metrics visible only to some members may hamper behavioral adaptation thus deepening our understanding of feedback metrics.

Finally, I provide compelling evidence on the need to expand the current research focus that seeks to address the questions: what must organizations do to successfully engage in strategic renewal, and how do organizations do this? Addressing these questions privileges the functional aspects of activities and masks the equally significant reality that where activities are performed and by whom are important for our understanding of strategic renewal.

Chapter 2

2 Literature Review

2.1 Strategic Renewal

Strategic renewal is the “refreshment or replacement of attributes of an organization that have the potential to substantially affect its long-term prospects” (Agarwal & Helfat, 2009, p. 282). The term ‘attributes’ refers to those directly linked to an organization’s strategy such as products, capabilities and goals. Strategic renewal denotes a specific type of change and infers that current activities and outputs are insufficient to meet the primary strategic objectives of long-term viability and survival (Albert et al., 2015; Barr, Stimpert, & Huff, 1992; Floyd & Lane, 2000). Additionally, I adopt the view that strategic renewal is “an ongoing journey instead of a discrete shift from one state to another” (Volberda, Baden-Fuller, & van den Bosch, 2001 p.161). Both definitions capture the dynamism of strategic renewal and highlight the importance of understanding the mechanisms involved throughout the process.

Research on strategic renewal concentrates on four main areas, with the majority of research at either the level of the organization or industry. First, research examines the role of environmental triggers on strategic renewal including changing customer needs (Tripsas, 2008), regulations (Capron & Mitchell, 2009; Smith & Grimm, 1987), and technologies (Agarwal & Helfat, 2009; Tushman & Anderson, 1986). Second, multiple studies explore the relationship between organizational factors and strategic renewal. These include examinations of system interdependencies (Albert et al., 2015), roles of

the CEO or top management team (Augier & Teece, 2009; Barr et al., 1992; Kwee, Van Den Bosch, & Volberda, 2011; Tripsas, 2009; Volberda et al., 2001), organizational structure and design (Calori, Baden-Fuller, & Hunt, 2000; Gulati & Puranam, 2009), resources (Bradley, Shepherd, & Wiklund, 2011; Combs, Ketchen Jr, Ireland, & Webb, 2011; Crook, Ketchen, Combs, & Todd, 2008) and organizational identity (Nag et al., 2007; Tripsas, 2009). A third group of studies focus exclusively on key skill and capability changes needed for strategic renewal such as adapting product development processes (Kim & Pennings, 2009; Salvato, 2009), adopting new technology (Agarwal & Helfat, 2009; Tushman & Anderson, 1986) and obtaining new skills through acquisition (Karim & Mitchell, 2000, 2004). Finally, research explores the underlying processes contributing to strategic renewal including learning (Crossan, Lane, & White, 1999), capability development and adaptation (Pandza, 2011; Teece, 2007; Teece, Pisano, & Shuen, 1997), discursive practices (Rouleau & Balogun, 2011), strategy emergence (Mirabeau & Maguire, 2014; Plowman et al., 2007) and the sub processes involved in renewing capabilities (Floyd & Lane, 2000).

The aforementioned group of studies establishes the importance of structural, organizational and environmental elements on strategic renewal. With some notable exceptions explored in more detail below, most studies focus on either the organization or the environmental level of analysis. Such a macro focus creates a significant gap in understanding how the strategic renewal process unfolds across the organization from idea generation through to implementation (Floyd, Cornelissen, Wright, & Delios, 2011; Hitt, Beamish, Jackson, & Mathieu, 2007).

A large body of research focuses specifically on the top management team's role during strategic renewal. For example, Barr et al. (1992) theorize a direct relationship between mental models of top managers and organizational actions. More recent research suggests there is a clear link between strategic renewal and top management team factors, such as superior information processing conditions (Augier & Teece, 2009; Tripsas, 2009), corporate governance orientation (Kwee et al., 2011) and dynamic managerial capabilities (Adner & Helfat, 2003). The concept of dynamic managerial capabilities incorporates the research on managerial cognition with that on managerial social capital (e.g. social networks, relationships) and managerial human capital (e.g. education, work experience) (for a recent review see Helfat & Martin, 2015). The importance of top managers in setting strategic direction and decision-making is not in question. The challenge, however, as Mintzberg and Waters (1985) suggest, is that strategies are rarely implemented precisely as intended. This suggests that directly linking top management cognition or dynamic managerial capabilities with outcomes may overstate the direct impact top management teams have on these outcomes.

Structure and design are also important factors in strategic renewal. Recent theorizing on strategic renewal suggests that the greater the interdependency of activities, the lesser the chance of strategic renewal (Albert et al., 2015). Clear rules or guidelines detailing the flow of information and allocation of resources can help mitigate this general tendency towards inertia (Albert et al., 2015). In their study of the Novotel hotel chain, Calori et al. (2000) posit that a change in structure providing global hotel managers autonomy from the corporate head office is a key factor in the success of their strategic renewal efforts. Research also suggests the existence of differing formal and informal

organizations drive strategic renewal by creating an ambidextrous organization. For example, in their study of Cisco systems, Gulati and Puranam (2009) show that in spite of reorganizing their formal structure to focus on cost reduction, Cisco was able to leverage their prior structure centered on customer responsiveness. In part, such gains were due to the strength of the informal organization and because there were substantial benefits to be gained from maintaining this structure. Gulati and Puranam caution that if the purpose of the reorganization is to provide focus, the existence of an informal structure may be more harmful than helpful. These studies link organizational structure and design with the behavior of organizational members but focus only on organizational elements. For example, the Cisco study suggests that engineers are instrumental in helping maintain the informal organization but without considering how adaptation may differ from those in marketing roles. By focusing on the organizational level of analysis, studies on structure and design fail to uncover the mechanisms connecting structural elements to renewal. Of further importance, there is little information on whether these mechanisms vary across heterogeneous organizational members.

Much of the research on capability change and adaptation emphasizes the importance of dynamic capabilities in generating renewal (Ambrosini, Bowman, & Collier, 2009; Eisenhardt & Martin, 2000; Winter, 2003) or specific capabilities needed to meet environmental demands (Karim & Mitchell, 2000; Kim & Pennings, 2009). The focus on types of capabilities is essential to our understanding of strategy but provides little guidance as to how capabilities themselves are renewed.

An important exception to this lack of emphasis on how capabilities develop is the longitudinal study on product innovation at Alessi by Salvato (2009), which highlights

the important role daily activities have in supporting the evolution of capabilities over time. Salvato argues that in order to understand how capabilities evolve or are renewed, researchers must examine the underlying processes comprising the capability. He finds that capabilities are adapted first as a result of organizational members experimenting with alternatives and then institutionalized through managerial interventions at key points in the process. These findings highlight the important role that individuals in organizations have in developing and enacting capabilities while moving away from the conceptualization of capabilities as an entity existing at the organizational level of analysis (Felin & Foss, 2005; Salvato, 2009). If capabilities are developed and maintained as a result of individual interactions and experimentation, what factors outside of managerial interventions either help or hinder this evolution?

One study shedding some insight into this question is the work by Pandza (2011), who examines how and why groups autonomously take action leading to organizational capability change. The author provides evidence that, among other factors, group-level identity is central as groups take action when current organizational capabilities may not ideally align with this identity in order to bring the two closer together. His study also provides evidence that organizational capabilities are not necessarily created under the direction and control of top management but can emerge as a result of complex social practices within the organization.

Conceptual work by Floyd and Lane (2000) is also instrumental in outlining key sub-processes involved in defining, modifying and deploying new skills and capabilities necessary for strategic renewal. One contribution of this work is the author's arguments that strategic renewal inevitably creates role conflict where managers must

simultaneously support current core activities and develop new ones. Floyd and Lane argue how aligning managerial controls with conditions in external factor and product markets help resolve these conflicts. The authors, however, limit their theorizing to the roles of top, middle and operating managers in each of these processes. As a result, there is no discussion outlining how the strategic renewal sub-processes are enacted at other levels within the organization. Work in the field of dynamic capabilities by Teece and his co-authors also exclude non-managerial roles and explore top management team processes such as sensing and shaping opportunities and threats, and organization level processes such as recombining assets (Teece, 2007). Outlining key processes is a necessary step in enhancing our understanding of strategic renewal, but there is little theorizing or empirical work on how, in practice, these processes are enacted across the organization.

Other process work focuses on delving into the multi-level nature of organizations.

Crossan et al. (1999) explore how a multi-level process of learning is foundational in the strategic renewal process. The authors describe four underlying processes in their 4I model: intuiting, interpreting, integrating and institutionalizing. Intuiting is a process that happens within individuals without conscious effort and interpreting involves translating and explaining both at the individual and group levels of organizations. The process model highlights the fact that intuition is not purely cognitive but also impacts behavior. While the framework acknowledges that strategic renewal involves both cognitive and behavioral elements, it does not consider the relationship between the embedded work activities of individuals on learning for strategic renewal. For instance, while the framework suggests that individuals intuit, this process occurs within a stream

of established activities. The strategic renewal process involves changing activities and it is unclear how these changes impact the intuiting process if at all. Equally important is deriving an understanding of the role and function of the established activities prior to any renewal efforts. Additionally, this multi-level approach to learning sets the foundation of understanding how learning occurs across levels, but does not distinguish between who is doing the learning and how that may impact the overall success of higher level processes such as institutionalizing. Lawrence, Mauws, Dyck, and Kleysen (2005) capture part of the institutional dynamic by incorporating social political processes into the 4I framework but do not link these processes to different roles or types of individuals in organizations.

The growing field of strategy-as-practice research is also providing insightful contributions to our understanding of strategic renewal. Strategy-as-practice has foundations in social practice theory and focuses on the interconnections between practices (habits, routines), praxis (activities comprising practices) and practitioners (actors engaging in praxis and practice) (Vaara & Whittington, 2012; Whittington, 2003). For example, in her body of work comparing strategic change at universities, Jarzabkowski (2003, 2005, 2008) finds that the way formal strategy practices (e.g. goal setting, resource allocation) are enacted by the top management team at the universities in her study impact interpretations of strategic activity and the structure of the overall environment. By comparing how practices influence both the context within which they unfold and the interpretation of practices, Jarzabkowski's work highlights the importance of considering the important role social context plays in strategizing overall.

Strategy-as-practice research also focuses on how key organizational stakeholders outside the top management team influence strategic renewal. In an empirical study, Balogun and Johnson (2004, 2005) extend strategic renewal research from top management teams to middle managers in their study of organizational restructuring. Their findings highlight the important role sensemaking at the middle management level has in determining overall outcomes. These authors challenge the notion that top managers have direct control over activities, as the social interactions of middle managers lead to the creation of their own interpretive schema and meanings, hence influence what is adopted. The authors suggest focusing on “deep structures” such as interpretive schema may be one way to better understand variation in responses to substantial changes like restructuring. Rouleau and Balogun (2011) extend this focus on sensemaking by showing how discursive practices used in organizational members’ daily work shape the implementation of strategic change. In their study of strategic renewal, Stensaker and Falkenberg (2007) provide evidence that individual level responses to change directly influence how an organization responds to change thus impacting how the same strategic initiative can be interpreted and adopted differently in the same organization. In other words, there is increasing evidence on the important role interpretation and social interaction has during strategic renewal (Balogun & Johnson, 2004, 2005; Bartunek, 1984; Heracleous & Barrett, 2001).

Research on strategy emergence also provides some important insights for strategic renewal. Mirabeau and Maguire (2014) outline a process of strategy emergence based on their comparison of projects that were successfully and unsuccessfully incorporated into a telecommunication company’s strategy. The authors outline several practices central to

successful emergence, including discursive practices such as making PowerPoint presentations articulating the links to the current strategy between different levels of management. Their study provides strong evidence that the activities outside of the top management team can play a central role in strategy emergence.

Finally, in research on the radical transformation of a church, Plowman et al. (2007) apply complexity theory to illustrate how a small change in activity becomes reinforced and amplified, ultimately leading to an overall radical change in strategy. These authors highlight the role that interactions between the language used, resource reconfiguration and symbolic action have in triggering change in the contextual conditions at Mission Church. Overall, the study provides an example of how strategic renewal emerges and the important role that actions and interactions play in this emergence.

2.1.1 Gaps in our understanding of strategic renewal

To summarize, the majority of research on strategic renewal focuses on macro organizational factors with an emphasis on determining external alignment and internal fit. Though these factors are instrumental in understanding strategic renewal, focusing our attention at the organization and industry level of analysis leaves a significant gap in our understanding of how this process is enacted across the entire organization (Floyd et al., 2011). Additionally, the planned nature and assumption of organizational control continues to prevail in spite of research to the contrary (e.g. Balogun & Johnson, 2005; Mintzberg & Waters, 1985; Mirabeau & Maguire, 2014). The growing number of studies examining how social, political and cognitive factors are important in strategic renewal is testament to the need for more research in these areas.

The strategic renewal process ultimately revolves around altering organizational activities, and more contemporary research confirms this central role (e.g. Albert et al., 2015; Plowman et al., 2007). Recent work reveals critical new insights into the role of social interactions, interpretation, activities and practices in the strategic renewal process. Furthermore, this contemporary work highlights how activities outside of management both influence and are influenced by strategic renewal. No research examines the link between occupations, identity and strategic renewal, but based on the above findings, this is clearly an important gap to fill.

There are also some inconsistencies between studies. For instance, Albert et al. (2015) explore contradictory claims regarding how interdependency of activities impacts strategic renewal. These authors propose that some research focuses on the structure or pattern of interdependencies and others on rules, or “the prescriptive guidance of resource and information flows among interdependent activities” (2015, p. 215). Highly interdependent systems can overcome their inertial tendency in the presence of clear rules that can help facilitate activity change by providing guidance on reconciling resource and information tensions arising during the strategic renewal process. This proposition seems inconsistent with the evidence that interpretations vary widely, thus strategy rarely emerges as intended (Balogun & Johnson, 2005). The apparent inconsistency suggests there may be limitations to the model proposed by Albert et al. (2015) but it is unclear at this stage what those may be.

One way to try to reconcile some of these differences and gaps is to focus our attention on the actual work being performed in organizations (Barley & Kunda, 2001; Bechky, 2011). Focusing on work is similar to the approach in strategy-as-practice studies, but

with less emphasis on specific practices and more on the work and activities of those performing them. It is particularly appropriate when considering the foundational arguments of strategic renewal rest on the importance of altering organizational activities and the output of those activities (Albert et al., 2015; Floyd & Lane, 2000). It also allows researchers to capture both activities and actors as work studies are not just about what people do but who the workers are. As Barley and Kunda (2001) state, “Because organizations are composed of people who react or fail to react to perceived changes in the environment, it is the activities of people that determine how organizations become structured. Human action generates variation” (p. 78-79). In other words, studies of strategic renewal need to account for both activities and actors to fully grasp how this process unfolds in organizations. One important influence on work in organizations is the presence of an occupation. For organizations inhabited by occupations, the work and activities of members is central to maintaining their occupational identity (Pratt et al., 2006). I believe this lens has the potential to yield important insights into the strategic renewal process and explain my arguments further in Section 2.2.

2.2 Occupational Identity

The concept of occupational identity is rooted in social identity theory. According to social identity theory, individuals associate themselves with other groups of individuals based on some common element (Tajfel & Turner, 1986). In my study, I focus primarily on ‘occupation’ as the common element thus specific values and practices of a occupation guide the actions of members (Ashforth & Mael, 1989). Occupational

identity forms as members of the social group interact with other members to create and uphold meaning (Ashforth & Mael, 1989).

I adopt the definition of occupational identity used by Ibarra (1999) as, “the relatively stable and enduring constellation of attributes, beliefs, values, motives, and experiences in terms of which people define themselves in an [occupational] role” (p. 764-765).¹ Occupational identity forms as a result of adhering to the social norms and rules of a occupation, as well as through work performed (Ibarra, 1999; Pratt et al., 2006). These norms bind members of the occupation together and form a foundation for members’ actions (Trice & Beyer, 1993; Van Maanen & Barley, 1984). Though the foundational beliefs and values may be relatively stable, I also adopt the view that occupational identity is continuously negotiated as members go about their daily work (Wenger, 1998). In other words, though members share beliefs and values, the daily activities and work of occupational members is integral in maintaining this identity (Anteby, 2008; Wenger, 1998).

Occupational identity incorporates both interpretive and activity lenses into our understanding of strategic renewal. Organizations are interpretation systems (Daft & Weick, 1984) inhabited by individuals (Hallett & Ventresca, 2006) who decipher behaviors and events through an identity lens. Research shows this interpretation

¹ The original definition uses the term ‘professional’ as opposed to ‘occupational’. There is a great deal of debate in the literature on the usages of these terms based on formal education, enforcement, etc. (see Abbott, 1988). I use the term occupation and reference research on both based on the work of Van Maanen and Barley (1984) who state, “*there are no fundamental distinctions to be found between a profession and an occupation which are inherent in the work itself.*” (p.318). For clarity and ease of reading I use the term ‘occupation’ but note that some of the original work I cite uses ‘profession’.

influences subsequent behavior (Albert, Ashforth & Dutton, 2000). As Section 2.1 argues, both interpretation and activities are important when considering the role of change in the strategic renewal process.

A recent study by Nelson and Irwin (2014) traces the interactions between the occupational identity of librarians and Internet search technology as documented in library industry journals over a 30-year period. The authors illustrate how occupational identity shapes both the interpretation and incorporation of Internet technology into the librarians' everyday work. At the nascent stages of Internet search, librarians questioned the importance of the new technology and largely dismissed its relevance. As the technology itself became more sophisticated, however, librarians first reacted critically by differentiating their work from that of the Internet until they eventually incorporated it into their occupational identity and leveraged the additive qualities of Internet search. Nelson and Irwin's study shows how central occupational identity is to the interpretation and adoption of new work practices. In order to accomplish any of the organizational skills or activity changes necessary for strategic renewal, the work of organizational members must change. Nelson and Irwin's focus is on the intersection of occupational identity and technology at the institutional level of analysis. As a result, their study contains very little information about the organizational conditions within which this change was unfolding. For example, the prestige or status of the library may influence either the speed or path of occupational identity evolution.

We know from research on strategic renewal in the healthcare field that organizational processes and structures impact occupational identity change (Chreim et al., 2007). In their study of strategic renewal at a healthcare clinic, Chreim et al. (2007) provide a

multi-level perspective on how the institutional, organizational and individual level dynamics work together as impacted physicians adjust to their evolving occupational role identity. Similar to the library study, occupational identity change is the phenomenon being studied thus there is little discussion outside of providing evidence that organizational dynamics impact the actions and interactions of the physicians in their study. Both of these studies demonstrate that occupational identity is important when adapting and enacting changes in organizational environments. There is no research, however, adopting an occupational identity lens to better understand strategic renewal.

While there is a lack of strategy research incorporating the importance of occupational identity, research in the fields of institutional logics and occupations highlight the influential role occupational identity has in organizations. In a study of significant structural change in a health care system, Reay and Hinings (2005) highlight the reluctance of physicians to alter their role within the institution. Throughout the system-wide strategic renewal efforts, physicians' refusal to adjust their beliefs regarding their role in the system causes numerous challenges and setbacks. Though their findings stop short of concluding this reluctance to change was a leading cause in the ultimate failure of the new healthcare system, Reay and Hinings study highlights the critical importance of directly examining how occupational identity impacts foundational processes necessary for strategic renewal.

In their review of occupations in organizations, Anteby, Chan, and Dibenigno (2016) summarize research on how variation in the way members engage in tasks, protect their areas of expertise and form new occupations to fill any voids created as a result of change in their environments leads to different organizational outcomes. For instance,

Barley (1986) explores how the introduction of new CT scanners challenges the traditional work of radiologists and technologists in two different hospitals. Barley finds that confronting beliefs surrounding role definition and managing this process impacts outcomes, in this case technology adoption. Similarly, Edmondson, Bohmer, and Pisano (2001) examine how surgeons with clearly defined roles learn to adopt a new process for cardiac surgery. During implementation, traditional roles are challenged and both leader and team member actions directly impact the learning process and success of the technology adoption. Research by Huising (2015) also highlights the important role activities play in establishing authority in research labs. Her study shows that engaging in activities outside of those typically associated with an occupation may actually protect the overall mandate and authority of an occupation even if the activities potentially damage the occupational image of those enacting them. Though Huising's study is not examining strategic renewal, it does provide strong evidence that those with occupations may adapt their activities in unconventional ways in order to protect their occupational mandate. These studies focus on occupational roles as opposed to occupational identity but call into question the assumption of organizational control in the strategic renewal literature. The research on occupational roles reviewed in this paragraph alone highlight the need for strategic renewal research to focus on factors beyond external alignment and internal fit as the majority of those in Section 2.1 contain. Floyd et al. (2011) also lament that research on strategic renewal is only beginning to address issues focusing on the roles of agency and structure. Research on occupational identity and roles paint a much more agentic view of the organization where influential groups within the organization directly impact outcomes. Consequently, incorporating the perspectives and insights

from work on occupations and occupational identity into strategic renewal research has the potential to enhance our understanding of the overall process.

Occupational identity embodies what members do and is thus tightly linked to the activities of their organizations. Furthermore, as the studies above illustrate, occupational identity guides the interpretations of changes and impacts adoption outcomes. The majority of research in this field, however, focuses on the occupational identity construct. Research examines occupational identity formation (Pratt et al., 2006) and adaptation (Chreim et al., 2007; Goodrick & Reay, 2010), managing stigma associated to occupational identity (Ashforth, Kreiner, Clark & Fugate, 2007), the relationship between technology and occupational identity (Nelson & Irwin, 2014) and how occupational members maintain multiple identities (Kreiner, Hollensbe, & Sheep, 2006). There is little research exploring the mechanisms linking occupational identity to other key organizational processes such as strategic renewal.

The importance of incorporating occupational identity into work on strategic renewal is vital as some scholars are suggesting that members of occupations may be more loyal to their occupations than employing organizations (Anteby et al., 2016; Van Maanen & Barley, 1984). In general, the relationship between occupations and organizations is portrayed as antagonistic with each stakeholder vying for control and autonomy over activities (Abbott, 1988). According to Anteby et al. (2016), studies examining how members of occupations perform activities focus on the jurisdictional battles between occupations and between occupations and organizations as each party seeks power and autonomy (Abbott, 1981, 1988). There is rich literature describing how occupational resistance to change stems from occupational members' struggle to maintain autonomy

and control from the bureaucracy over their tasks and activities (Abbott, 1988; Detert & Pollock, 2008; Freidson, 2001; Greenwood & Hinings, 1996; Townley, 2002; Van Maanen & Barley, 1984). Foundational work by Van Maanen and Barley (1984) depict the relationship between occupations and the organizations employing them as one of tension, resistance and a battle for autonomy and control. The opening line of his study on the occupation of restaurant chefs by Fine (1992) illustrates the focus on jurisdictional battles between the bureaucracy and occupation. He states, “How is ‘good’ work possible, given demands for autonomy and organizational constraints on that autonomy” (p.1268)? Even within an occupation, members can resist and may even go so far as to construct an alternative occupational identity to regain this autonomy (Rao, Monin, & Durand, 2003). As a result of this historical focus on autonomy as a key component of occupational identity, it is not surprising that studies of strategic renewal in organizations focus on these bureaucratic tensions between occupational members and organizations.

There is work suggesting the relationship between occupational members and employing organizations is not always adversarial. Research examining the intersection between technology and occupations show that activities do adapt as the context shifts (Barley, 1986; Nelson & Irwin, 2014) but these studies do not directly consider the interaction between changes in strategic attributes and occupational identity. In his study of the illegal creation of artifacts by craftsmen, Anteby (2008) examines why management at an aeronautical plant allow skilled craftsmen to illegally utilize firm resources to create personal mementos. In this plant, the opportunities to enact their occupational identity are diminishing. Granting leniency by allowing these mementos to be created is one way to ensure the craftsmen are able to enact and preserve their occupational identity. Anteby

argues allowing this illegal activity provides identity-reinforcing activities and is a form of control that managers can exert over occupational groups. The study by Anteby does not examine occupational identity enactment during strategic renewal, but it does highlight the reality that organizations hire members of an occupation to leverage their expertise and provide opportunities to maintain their sense of identity through engaging in activities that cultivate this expertise.

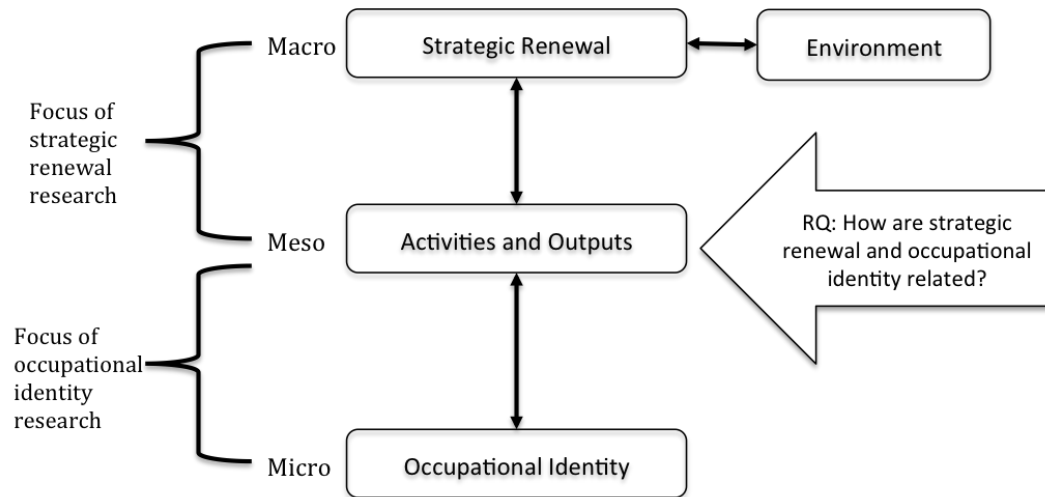
There are a growing number of studies focusing on how members from different occupations are able to collaborate. Results of this work reveal how members of occupations use artifacts to not only reinforce occupational jurisdictions but also to transfer and transform knowledge during the product development processes (Bechky, 2003; Carlile, 2002). These artifacts enable members with different identities to negotiate differences and support the innovation process. Research in hospitals suggests that occupational identity enables quick action during periods of change and uncertainty. In their study on trauma teams, Klein, Ziegert, Knight, and Xiao (2006) show that attending physicians will take over leadership activities from residents in urgent or unique situations. The authors do not discuss occupational identity but their description suggest these attending physicians are the overall experts in trauma teams. When situations arise requiring them to enact this expertise, the attending physicians immediately engage in activities otherwise performed by residents or other members of the team. Based on these studies it seems that occupational identity can be a key enabler of essential activities during periods of uncertainty, as activities are enacted outside regular boundaries.

By definition, strategic renewal is a highly uncertain process requiring flexibility and adaptation. Consequently it is reasonable to assume that occupational identity may also play a more positive role during periods of renewal than the review of the literature suggests. Several studies are situated in contexts where strategic renewal is occurring but do not focus on this. Though it is out of the scope of their research on identity change by Nelson and Irwin (2014) described in detail above, it is natural to conclude that the libraries are engaging in strategic renewal to address the challenges Internet search is having on their operating model. While Nelson and Irwin provide evidence that librarians do engage positively with significant changes at the institutional level, their study does not examine what is happening within individual organizations. My study fills this gap by examining how strategic renewal and occupational identity are related in order to understand the entire relationship between these two important aspects of organizations.

Research in the field of strategic management often includes members of occupations, however, few focus on the unique characteristics that accompany these occupations. For example, in a study of a failed renewal effort, Nag et al. (2007) document the reluctance and resistance of organizational members, some of whom are engineers, to modify their work practices. The authors conclude the failure of strategic renewal at this organization is linked to practice inertia, however they do not examine the potential role of occupational identity in their study. As opposed to treating occupations as a contextual variable in strategy research, my dissertation shines a light on occupational identity to better understand the relationship it has with strategic renewal.

One way to conceptualize the relationship between strategic renewal and occupational identity is to bridge these two worlds by focusing on work and activities. I view strategic renewal as a process occurring at the macro level of organizations, accounting for the strategy-environment linkages, a key component of the definition and area of focus of strategic renewal research (Agarwal & Helfat, 2009; Albert et al., 2015). Internal alignment of resources and capabilities supporting this external fit is also central in research on strategic renewal (Floyd & Lane, 2000). Activities form the foundation of these resources and capabilities (Albert et al., 2015). In contrast, I consider occupational identity at the micro level of organizations, as members use this lens when enacting activities. In other words, research on occupational identity is concerned with activities, but focuses on ‘fit’ with the demands and expectations of the occupation.

My dissertation brings these two disparate fields of research together by examining the meso-level consisting of the activities themselves. I propose that focusing on activities will help link strategic renewal and occupational identity in order to better understand how they are related. I provide a conceptual framework in Figure 2-1 outlining this proposed relationship driving my research question: *How are strategic renewal and occupational identity related?*

Figure 2-1 Conceptual link between strategic renewal and occupational identity

Chapter 3

3 Methods

3.1 Case Selection

I use a single-case study, which is appropriate for revealing insights into unexplored relationships (Yin, 2003) and exposing mechanisms supporting organizational processes (Gutierrez, Howard-Grenville, & Scully, 2010). I also select a single-case study as my primary purpose is to elaborate on current theory (Lee, Mitchell, & Sablinski, 1999) as opposed to develop grounded theory (Charmaz, 2004). In Chapter 2, I established that research on strategic renewal focuses on planned factors such as environmental fit and internal alignment. Focusing on these factors fails to consider evidence that both interpreting and behaving impact strategic renewal. I purposefully selected an organization with strong occupational ties and undergoing strategic renewal. I contacted and secured access to NatNews², a North American newspaper with national distribution and readership as an appropriate research site for this research. For reasons outlined in more detail below NatNews is both a ‘revelatory’ (Yin, 2003) and an ‘extreme’ (Eisenhardt, 1989) case organization as it contains a strong occupation and is currently undergoing a transformative strategic renewal process. NatNews is an ideal context to achieve my goal of theory elaboration (Sonenshein, 2014).

² NatNews is a pseudonym. Though the organization granted permission to use their name, to limit any potential censoring or bias in analysis I adopt a pseudonym.

The history of NatNews began in the early 1800s. Though politics was a focus early in its history, in the mid 1900s NatNews also began focusing on business journalism. There have been various owners throughout the years and at the time of my study NatNews was a privately held corporation. At the time of writing, NatNews has just over 600 employees and in 2014, according to audited information publically available, has an average weekly circulation (print and digital) of 2.1 million. Similar to most traditional newspaper models, NatNews has two main sources of revenue: advertising and subscriptions. In spite of the fact that print advertising revenue continues to shrink it remains the largest source of revenue for NatNews. As NatNews is a privately held company, all other financial information is confidential.

NatNews is an ideal site to study the relationship between strategic renewal and occupational identity. With a long established history in the newspaper industry, NatNews is facing substantial pressure to adapt to digital patterns of news consumption. The industry is facing enormous challenges to the established business model of funding journalism through the sale of advertising. The dramatic change is reflected in the headline associated with a 2012 study published by the Poynter Institute stating “Newspapers get \$1 in new digital ad revenue for every \$25 in print ad revenue lost” (Edmonds, 2012). This precipitous drop in revenue challenges the established business model and provides multiple opportunities to observe and discuss strategic initiatives being implemented to meet these challenges. Additionally, NatNews’ reputation and brand is built on award-winning journalism. Over the years they have won multiple awards for their outstanding journalism as well as specific recognition for their digital journalism, winning several Online Media Awards and EPPY (Editor & Publisher)

awards. Furthermore, a substantial number of their over 600 employees support the creation and production of editorial content.

One final reason for selecting NatNews as a research site is that I have no background or training in the journalism occupation. Though this lack of background makes for a steep learning curve, it helps to minimize any biases, particularly in regards to occupational identity. I entered the field with very little knowledge of what it is like to be a journalist and purposefully limited my background reading on journalism prior to entry. As I progressed with my data gathering I began reviewing journalism research to compare my findings with the extant research in this field.

3.2 Data Collection

My data includes interviews, field observations and archival data collected from September 2014 - October 2015. There were three main stages of data collection over a one-year period. In the first stage, I gathered formal interview data, which was recorded and transcribed. I also attended three daily story meetings to help build contextual understanding. My second stage of data collection focused on observations and included an additional 49 informal interviews, which were not recorded and are included in my observation notes. My third and final phase consisted of the 11 final interviews, which were recorded and transcribed. Conducting my initial interviews over a four-month period was essential to building a more thorough understanding of important strategic initiatives as it allowed me to conduct analysis and then probe for understanding in subsequent interviews (Corbin & Strauss, 1990).

3.2.1 Interviews

My main contact at NatNews was the Vice President (VP) of Human Resources, and she helped to coordinate participant recruitment. To help ensure anonymity, in August of 2014 the VP of Human Resources sent an ethics approved invitation to participate in my study and those interested contacted me directly (see Appendix A for ethics approval). A reminder email was sent in September when more people returned to work after summer vacation. In October 2014, a final email was sent to a specific department in order to balance out my study participants. Participation was anonymous and I did not provide a list of participants to NatNews outside of the breakdown appearing in Table 3-1 below. The majority of my participants were from the editorial side of the business, however I also interviewed members from other areas of the organization including distribution, advertising, sales and information technology, which I include in the ‘Non-Editorial’ category in Table 3-1. My original intent was to also use snowball sampling but once in the field I realized this sampling technique would potentially sacrifice the complete anonymity of my participants by revealing participation. I did recruit a participant via snowball sampling as one of my participants voluntarily offered to contact a colleague whose perspective he felt I would value. He offered to do this without prompting and when we discussed the fact it would risk revealing his participation in the study he was comfortable with the decision and the new participant was contacted. Though recruiting a colleague revealed his participation, it does not compromise his anonymity. To protect the anonymity of all participants I use pseudonyms and remove proper names of events and companies where revealing these may identify a participant.

With the exception of five phone interviews, I conducted the taped and transcribed interviews in a private meeting room at NatNews. Prior to commencing the interviews I received either taped verbal or written consent to record and transcribe the interview data. Interviews lasted from 30 – 120 minutes with the average interview lasting just over 60 minutes. After transcribing, these interviews yielded 1374 pages of interview data.

Table 3-1 Interview participants

By Title/Role	First Round	Second Round	By Section	First Round	Second Round
Reporter	14	6	Features and Weekend	6	2
Editor (Assigning)	7	3	News, Sport, Comment	6	2
Editor (Other)	7		Business	8	4
Executive/ Director/ Senior Manager	6		Other Editorial	12	2
Other roles (Non-Editorial)	5	2	Non-Editorial	7	1
Totals	39	11	Totals	39	11
Overall Total		50	Overall Total		50

I used a semi-structured interview protocol based on my review of the literature (See Appendix B-D). The goal of my study was to elaborate on established theory (Lee et al., 1999), thus the interview protocol was designed to generate an understanding of both strategic renewal and occupational identity. The beginning of the protocol focused on questions pertaining to personal histories as they related to journalism, schooling, employment etc. I also asked several questions regarding strategic initiatives and

changes participants had experienced during their employment at NatNews. The protocol served as a rough guide and when appropriate I probed for details or context using various question types as outlined by Spradley (1979). I used descriptive questions such as ‘walk me through a typical week’ and then used probing questions to clarify details. For example, reporters used phrases such as ‘file to the web’ so I clarified by asking, ‘What do you need to do to file to the web?’ I also asked contrasting questions such as, ‘What are the similarities or differences when filing to the web or print?’ Using a semi-structured interview protocol was flexible as it allowed me to alter my protocol as the study progressed (Gioia, Corley, & Hamilton, 2012; Strauss & Corbin, 1998). After the first ten interviews most of my participants proactively raised the same strategic initiative in response to my question asking them to describe a strategic initiative that was challenging to implement. In spite of the fact I quickly became aware of some of the central concerns regarding this specific issue, I did not want to prime participants and thus continued with my general protocol. One participant stated he had been waiting for me to ask about the issue, as it was a source of substantial conflict in the newsroom. In order to demonstrate knowledge and understanding of their context, I adjusted my protocol in subsequent interviews and saved sufficient time to discuss the specific issue at the end of the interviews. I also attended three daily story meetings early in my data collection, which provided a richer understanding of the context and improved my ability to probe for details in terms familiar to the participants.

The next set of taped and transcribed formal interviews occurred at the end of my study period. I conducted 11 interviews with a select group of informants from the initial sample. I selected these interviews based on interviewee availability, role and ability to

provide perspectives missing from data. The primary purpose of these interviews was to fill gaps in my understanding around specific strategic initiatives and clarify details from my observations. I also used these interviews to member check some of my interpretations and conclusions (Turner & Coen, 2008). Similar to the first round, these 11 interviews were recorded and transcribed. My interview protocol contained very few questions, all of which were in the following style: ‘Tell me about your experience with [Initiative A]. How, if at all, has it changed how you approach your work?’ These questions started the conversation and I probed for details in the same manner as described above. I concluded each interview with the question: ‘Is there anything that I didn’t ask that you feel I should have?’ Finishing the interview with this question often carried the conversation away from specific initiatives but my technique of probing for details continued.

3.2.2 Observations

The majority of the data collection period was spent conducting observations. From January 2015 to October 2015 I visited the newsroom for multi-day periods once or twice per month as my schedule allowed. My role as a ‘participant-as-observer’ provided the contextual background needed to understand my interview data (Gold, 1958). My observation data provided more than just context and I analyzed both interview and observation data. Conducting observations was also helpful when studying work and activities as it allowed me to observe different occupational roles in action (Bechky, 2011). I spent most of my observation time in the business section either at a centrally located meeting table or unoccupied desk close to this meeting table. At the outset of my

study, senior level managers suggested the business section would provide me with the best opportunity to gather observational data as it is published daily and most editors and reporters are local. Additionally, there were members in the business section during regular business hours; an important factor for collecting observational data. One of my interview participants contacted the managing editor of the business section prior to commencing observations and secured access. I also spent a few days observing the main digital desk operations and similarly sat at a central meeting table for these observations. Finally, I also observed the main editing desk created as a result of one of the more substantial changes during my observation period in the newsroom. In a similar manner, permission to conduct observations was first secured with the head of the department or section and then with each participant I observed. With permission, I would also sit behind an individual as they worked for anywhere between ten minutes and two hours.

The office at NatNews was open concept and most employees sat in the open area. There were private offices, however managers and editors typically used these offices for private meetings as opposed to conducting their everyday work. As I spent the most time in the business section, my presence was quite familiar to those who worked there and I was included whenever there were meetings. All section meetings took place at an open table located close to the editorial work area. Often this was the table I was sitting at. I sought permission before attending any new meetings. My on-site visits continued until my final visit in the beginning of October 2015 when I determined I was no longer learning any new information about the relationship between occupational identity and strategic renewal (Suddaby, 2006). During these visits I conducted an additional 49

informal interviews (not recorded) and took handwritten notes in coil scribblers. Occasionally, I was able to directly input notes into my computer on-site but when that was not possible I typed up my handwritten notes within 36 hours of leaving the field. Meetings were an important part of the rhythm of the newsroom during my observations and I attended 80 meetings, including daily newsroom wide story meetings (38 out of the 80), section meetings and various team meetings (the remaining 42 meetings were in these categories). I also attended a half-day of kickoff meetings for the launch of a new digital app that I included in the count containing team meetings. I compiled 404 pages of notes from these observations, meetings and informal interviews. A complete summary of my data sources is in Table 3-2.

3.2.3 Archival Documentation

I also collected supplementary archival information including internal documents, reports, project plans, pitches, organizational charts, strategic planning documents and emails. Several confidential internal memos were also posted on public websites; in this industry internal memos are often leaked. I used these documents to provide context and perspective on the daily activities and previously identified strategic initiatives. In total I gathered forty internal and thirty-five external documents in various lengths and formats ranging from single page emails to a thirty-page project report.

My final source of archival data was a book by a former Editor-in-Chief written after he left NatNews. The book provided an insider yet public perspective on several of the initiatives in my data. The university library received a copy in 2016, thus I only reviewed the book after my fieldwork was completed. I used the book to triangulate

findings and add contextual background. I also used it to triangulate timelines and details about strategic initiatives already in my data.

Table 3-2 Summary of data sources

Source	Totals
Recorded Interviews	50 interviews (breakdown in Table 3-1); 1374 pages of transcripts
Observations	245 hours over 7 months; 404 pages of double-spaced notes
Meetings attended	80 meetings in total. The majority of these are daily story meetings 38 meetings including multiple section representatives (meetings were 15- 30 minutes in duration) 42 at either the section, project or team level
Informal Interviews (not recorded)	49 in total
Internal Documents	40 (Emails, planning documents, org charts, reports, etc.)
External Documents	35 (Leaked memos, Interviews, Media Commentary, web articles, etc)
Book	1 (by a former Editor-in-Chief)

3.3 Data Analysis

I entered the field with the hypothesis that strategic renewal and occupational identity were linked but had not formalized any explanation as to the nature of the linkage. The fact that I was seeking to understand a specific relationship impacts how I gathered and analyzed my data (Klein & Myers, 1999). I focused my analysis on understanding the work and activities of organizational members (Barley & Kunda, 2001) and on tracking initiatives being implemented as part of the strategic renewal process. Studying activities

to inform theory has been well-established approach in organizational studies. For example, Dutton and Dukerich (1991) examined the activities of the New York Port Authority as they responded to the issue of homelessness. The authors used this analysis to draw important implications for organizational identity theory. More recently, Huising (2015) examined the work and activities of two occupational groups and illustrated how engaging in specific types of tasks and activities impacted the creation of relational authority between occupations in research labs. Bechky (2011) also suggested that studying the activities and work of those within organizations has the potential to reveal new insights in understanding organizations.

In order to understand the relationship between strategic renewal and occupational identity I focused my attention on the activities of two occupational roles in the newsroom: assigning editors (hereafter referred to as editors) and reporters. There were multiple types of editors in the newsroom but unless indicated otherwise I use the label 'editor' to refer to any editor with story assigning responsibilities as part of their role. Though there were a myriad of roles in the newsroom I selected these occupational roles as in formal and informal interviews both unequivocally considered themselves journalists whereas some of the other occupational groups hesitated to make this claim. Additionally, these were the two primary occupational roles involved in pre-publishing activities of editorial content, a key output at NatNews.

At NatNews the editor role was central in the functioning of the newsroom and adoption of strategic initiatives as there were very few hierarchical layers. For example, the section editor (section editors have assigning duties) is the most senior editor in a section. The editor is the only role separating a reporter from the Editor-in-Chief. The Editor-in-

Chief was a member of the executive or top management team thus unlike other similarly sized organizations there were relatively few managers. Consequently, an editor straddled the key strategic roles with much fuzzier boundaries than those outlined in Floyd and Lane (2000) and editorial support was essential for the smooth implementation of any substantive change in the newsroom. There were other informants in my study as outlined in the table of interviews above. I use the labels such as ‘senior manager and ‘digital editor’ to distinguish their comments from the two main roles of editor and reporter.

I primarily used a constant comparison method during my data collection and writing phases and cycled between data and theory (Corbin & Strauss, 1990; Locke, 2001). I employed various methods to assist me in making sense of my data including constant comparison (Strauss & Corbin, 1998), writing descriptions (Geertz, 1973), writing memos (Erlandson, Harris, Skipper, & Allen, 1993; Lincoln & Guba, 1985), employing ethnographic analysis outlined by Spradley (1979) and probing for meaning and understanding using Feldman (1995) as a guide. I outline my approach in more detail below.

I initially used *in-vivo* coding to capture the voice of my participants. After my initial coding I went back and grouped codes together based on the literature on strategic renewal and occupational identity. I looked for key themes highlighted by the strategic renewal literature including items such as ‘resource allocation’, ‘competitive advantage’ and ‘core competence’. To analyze occupational identity I focused on understanding the activities in the newsroom and isolating the values and beliefs driving these activities. I compiled lists of activities by coding my interview and observational data and

triangulating it with archival documents. I conducted member checks to ensure I was accurately reflecting how members of both key roles defined their identity and work (Lincoln & Guba, 1985; Turner & Coen, 2008). After these member checks I made adjustments to my coding and analysis as suggested. To understand how these activities fit together I created high-level activity maps, which I also confirmed with informants (see Appendices E, F and K). These are not exhaustive lists of activities, but a map of how the activities within the different roles fit together. I also identified beliefs and values emerging from my data. Coding in this manner captured two components of occupational identity: what occupations do (Pratt et al., 2006) and the beliefs, norms and values driving this behavior (Ibarra, 1999). Early on in my data coding I realized that many of these beliefs and values existed in tension. I coded my interview transcripts and observational data to try to understand the nature of these tensions. I include samples of my coding in Appendices G, H and I. Before I arrived at the codes presented in the table there were several iterations of coding. After realizing that tensions were emerging from my data I started coding for tensions and finally settled on differentiating tensions based on the source of tension. For example, in Appendix G - I, I identified tensions between beliefs and values, but also tensions with business outcomes such as revenue and tensions arising from the resource context. I used the term tension to refer to any situation that must be resolved and what leads to resolution. These can be both positive and negative tensions. Not all coded sections contain tensions and the purpose of Appendix G - I is to provide a sample of some of the different types of data and how it was coded. I also carefully noted whether the quote is linked to an editor or reporter.

To help with my understanding I wrote descriptions of each phase of the editorial process (see Appendix K for the process), as well as each strategic initiative, revisiting them as new information came available (Geertz, 1973). These descriptions helped me document the initiatives and responses to them. My initial approach had been to compare initiatives so many of the tables I created focused on comparing them, however, the strategic initiatives varied too much for an analysis of common attributes (Eisenhardt, 1989). Prior iterations of my findings relied more on comparing initiatives but the nuances and tensions were lost by comparing each initiative on rigid criteria as it forced me to ‘fill in’ artificially rigid categories. In the end, I settled on explaining these initiatives using vignettes (e.g. Rouleau, 2005) to capture and ‘show’ the tensions in my data (see Chapter 4). I wrote memos after several of the initial interviews and observation days to help identify the emerging themes and capture my early thoughts and interpretations. Writing memos was essential to cycle back to the literature and informed my ideas (Corbin & Strauss, 1990). The data analysis process outlined above formed the foundation of my findings outlined in Chapter 4, however, it also revealed some inconsistencies between the literature and my data. For example, based on my literature review and initial meetings with senior management, I expected strategic initiatives involving significant activity change to be more difficult to implement than those with little impact to activities. My data analysis did not support a direct link between the magnitude of activity change and adoption thus I re-examined my data using some of the techniques outlined below to better understand my emergent findings. I focused on understanding the mechanisms involved in the newsroom activities and analyzing the relationship that implementing strategic initiatives had with these mechanisms.

I relied on the ethnographic analysis method outlined by Spradley (1979). I started my ethnographic analysis by identifying symbols or ‘any object or event that refers to something’ (p. 95). For example, ‘content’ was one symbol that emerged early on in my data. I then conducted a domain analysis to better understand the various usages and meanings for ‘content’. I probed more deeply into the meaning of a particular domain by grouping data according to semantic relationships by asking questions such as: What is categorized as ‘content’; What is a reason for creating ‘content’; What is a characteristic of ‘content’? By conducting a domain analysis for content I realized my informants made clear distinctions between types of content such as editorial and advertorial content thus I analyzed each of these separately to understand why. From here, I examined the taxonomy for a domain in order to understand how different elements of the domain are related. I compiled different taxonomies such as ‘types of editorial content’, ‘attributes of editorial content’ as well as taxonomies of activities necessary in the creating of editorial content. I then compared the different taxonomies by analyzing them to understand the differences or contrasts between these elements (1979, p. 178). Though I described an orderly sequence of analysis this process was highly iterative. As my analysis proceeded I cycled between my data and theory (Corbin & Strauss, 1990) which triggered adjustments to my analysis.

Based on adopting the ethnographic analysis approach outlined above I realized that there were multiple meanings associated with activities in the newsroom. I explore this observation in more detail in Chapter 4, however, in order to better understand my emerging findings I used semiotic analysis. I relied on the approach outlined in Feldman (1995) and Barley (1983). My semiotic analysis focused on signification, or “the process

by which events, words, behaviors and objects carry meaning for members of a community and for the content they convey” (Barley, 1983, p. 394). These carriers of meaning are called ‘signs’ and are important foundational elements for members of a particular community to make sense of their environment (Barley, 1983). Using semiotic analysis built on the ethnographic methods analysis outlined in the prior paragraph as semiotics helped me probe even more deeply for meanings. To follow through my example outlined above, content appearing on the front page of a newspaper was a physical way reporters convey information. The connotation, however, was more complicated. For example, content on the front page was deemed more important and influential than articles appearing inside for various reasons (quality of writing, analysis, importance to public). I used the methods outlined by Spradley (1979) to begin understanding these relationships and relied on Barley (1983) and Feldman (1995) to hone my analysis and understanding. The approach resonated deeply with me as in order to understand the link between strategic renewal and occupational identity I needed to understand how editors and reporters understood their actions and the reasons for them. I discovered this method late in my data-gathering phase so could not incorporate many of the suggestions into my design; however, it was helpful to hone the findings I subsequently outline in Chapter 4. For a visual representation of this coding please see Figure 4-2.

Chapter 4

4 Assessing the relationship between strategic renewal and occupational identity at NatNews

My examination of how strategic renewal and occupational identity are related reveals three key findings. First, occupational identity is much more flexible than prevailing research on social identities suggests. I outline several core and distinctive beliefs and values driving the behavior of editors and reporters in the newsroom. These beliefs exist in tension that members of both roles must balance and resolve as they engage in their everyday activities and work. In other words, the beliefs directing and influencing behaviors are neither unequivocal nor concrete in their enactment. Such flexibility allows for a wide range of acceptable activities. Though the underlying beliefs and values are relatively stable for the duration of my study, the flexibility created by balancing tensions between beliefs allows occupational members to adopt new activities as meanings and enactment of these beliefs and values shifts.

Second, flexibility in beliefs and values has mixed effects on adaptations during the strategic renewal process. Similar to other studies, I find evidence that occupational identity hinders strategic renewal. Occupational identity, however, also helps facilitate strategic renewal. As opposed to acting as an obstacle to renewal, the flexibility created by constantly balancing beliefs and values enables members to adopt new activities in order to get the job done.

Third, I isolate two key mechanisms contributing to these mixed effects. Both meanings and metrics act as mechanisms allowing occupational members to adapt their behavior to various degrees. To demonstrate and show this relationship, I provide three vignettes of strategic initiatives impacting two key roles in the newsroom: editors and reporters. I compare how members of both occupational roles are using these mechanisms during the strategic renewal process at NatNews.

I begin this chapter with a brief description of two key contextual conditions that shape the activities of reporters and editors. As outlined in Chapter 3, I focus specifically on the occupational identity of editors and reporters but show relevant data from other organizational members where it enhances the analysis. I provide some historical background of NatNews, highlighting how the shift to digital consumption is putting pressure on resources. Tammy, a reporter, summarizes the implications of the context:

“Here the challenge is of course, I'm busy. My editors are busy. We're in this crazy situation where there's a multiplication of platforms so it requires more resources, but we haven't increased the reporting resources. The primary material, the information, is still provided via the same number, or even a shrinking number of reporters, but you need to hire more people to tend after the mobile platform, the website, a whole bunch of people who are doing functions that didn't exist before because essentially, we're operating two concurrent businesses, a newspaper and a website. We're in that phase where we have to do more with the same resources.”

In other words, there are minimal slack resources at NatNews. These resources include essential components such as financial, reporting, and information technology.

The accompanying shift to digital and resource pressures impact the context within which strategic renewal is unfolding. Pamela, a reporter, states:

“I don’t like the notion of the ‘good old days’. There were plenty of times in my career where 70% of my time was spent trying to figure out how to get a story back, 20% reporting it and 10% writing it. So the digital shift has been a good thing for journalism. It forces you to focus on the value add.”

Operating in a resource-constrained environment is an important component of the context. The reality is a daily newspaper cannot stop operating to experiment with alternatives, as the paper must be published in order to generate the much needed subscription and advertising revenue.

“The difficulty with transforming an organization - and the news business may be worse. I mean if you have a Christmas tree farm you've got 11 months to figure it out and 1 month to sell everything. In the news business even in the ‘good old days’ they were on a 24 hour cycle. It's not like – let's shut it down for a couple of weeks and figure out what we're going to do next” (Pamela: Reporter).

Both of these contextual conditions simultaneously highlight how important strategic renewal is to NatNews, but also the resource challenges they face. The context within which strategic renewal is unfolding is challenging, highly uncertain and significantly impacts the way activities are enacted at NatNews. I revisit this throughout my analysis but believe it is important to set the stage at the beginning of this chapter to highlight the significance of context.

4.1 Outlining occupational identity

My first finding reveals that the enactment of occupational identity is flexible. I arrive at this conclusion after documenting how editors and reporters enact occupational identity in their everyday work. My finding aligns with other studies of newsrooms that conclude values conflict and editors and reporters must actively balance the tensions between them to get the job done (Deuze, 2005; Usher, 2014). I highlight several espoused beliefs and values, most of which conflict and exist in tension. I use the term ‘espoused’ to capture the idea stated by Trice and Beyer (1993), “In effect, people justify behaviors both prospectively and retrospectively by what they believe” (p. 35). Though beliefs and values emerge from the raw data (see Appendix G - J for coding samples), I make a distinction between them. Beliefs motivate behaviors and focus on cause-effect relationships whereas values express ideals or preferences (Trice & Beyer, 1993). Distinguishing between values and beliefs is important as beliefs are relational and form the foundation for activities thus capture how and why members behave in specific ways. Values are ideals or the outcomes of what members are trying to achieve by enacting their beliefs (Trice & Beyer, 1993).

I present the espoused beliefs and values in Figure 4-1 below and spend the remainder of this section showing how editors and reporters enact these beliefs in their daily activities as these form the foundation for occupational identity (Nelson & Irwin, 2014; Pratt et al., 2006). Focusing on the activities of reporters and editors illustrates not only the range of behaviors occupational members perform when enacting them, but also how they resolve the tensions arising between beliefs and values.

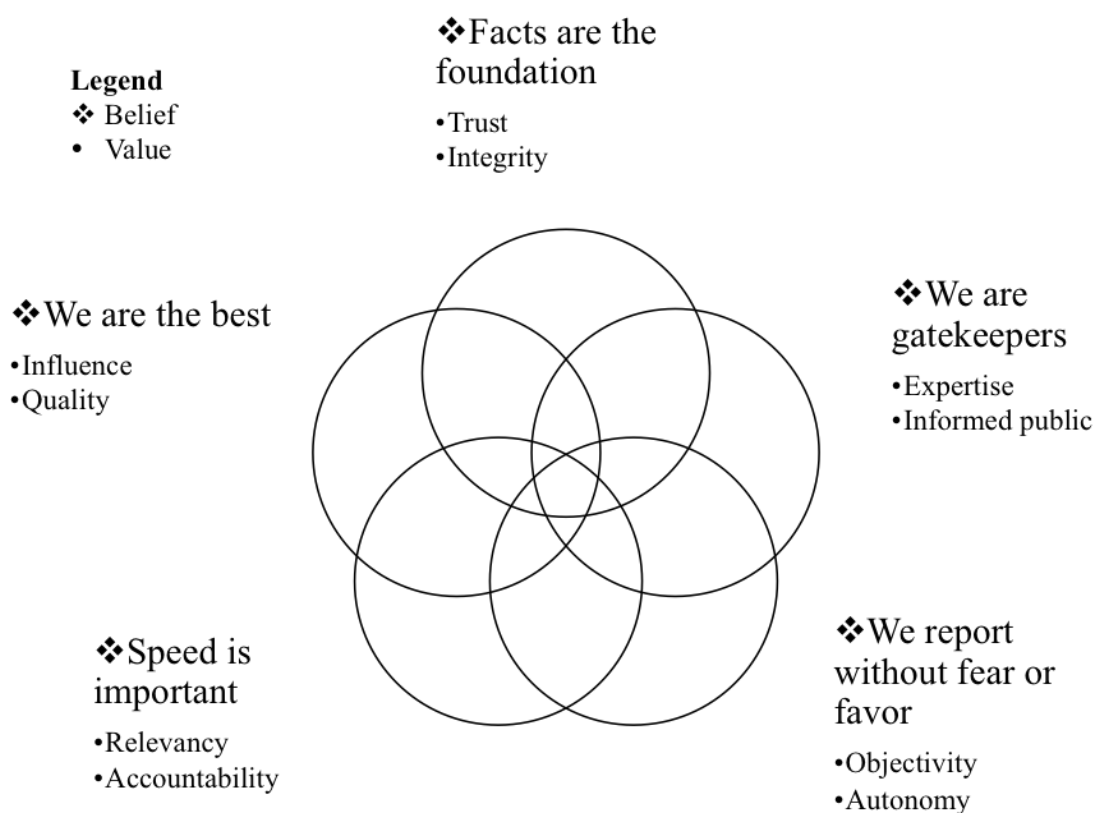
My discussion below is in two parts. First, I explore the three beliefs on the right of Figure 4-1 (see Appendix G – I for data coding sample). The three beliefs are: facts are the foundation, we are gatekeepers and we report without fear or favour. These beliefs form the foundation of the activities in the newsroom and are not unique to the journalists at NatNews. All three beliefs and values adhere to the code of ethics published by the Society of Professional Journalists as well as academic research on the ideology of journalism (Deuze, 2005). Additionally, these three beliefs are discussed either directly or indirectly in the publicly available Editorial Code of Conduct for NatNews. Acting in accordance to these common occupational beliefs is important to maintaining its credibility and legitimacy as a journalistic organization (Deuze, 2005) and are also evident in other ethnographies of newsrooms (e.g. Gans, 1979; Usher, 2014). For example, Ryfe (2012) describes the cultures of three American newsrooms and states, “Journalists everywhere share common values and attitudes toward their work and go about gathering and reporting the news in similar ways” (p. 59).

The other two beliefs, ‘we are the best’ and ‘speed is important’ also drive behavior, but are not used to directly describe ‘who are we’ as journalists (see Appendix J for coding). The belief that speed is important is not central to the occupational identity of the editors and journalists at NatNews even if it is essential to how they conduct their everyday activities. Similarly, Usher (2014) describes speed as a ‘contested value’ in her examination of the impact of digitization on the New York Times newsroom. Given the nature of deadlines, speed is always important, but the importance of speed is amplified by the 24/7 nature of digital publishing. The belief itself does drive behavior and is

included in my analysis below as it forms an important part of the context triggering several tensions within and between other beliefs.

The belief that we are the best also sits on the periphery of occupational identity but for a different reason. Interviews and conversations reveal that my informants do not separate the beliefs and values of NatNews from the occupation of journalism. In fact, requests to differentiate organizational and occupational values were met with puzzled looks as my informants see them as the same. It is beyond the scope of my dissertation to explore this finding in detail but this finding is aligned with work by Kreiner, Ashforth, and Sluss (2006) who posit that the more central the work of an occupation is to an organization, the greater the influence the occupation will have on the culture and identity of the organization. Additionally, my intent is to study links between occupational identity and strategic renewal, and do not collect sufficient data to comment on organizational identity. Rather I acknowledge that due to the centrality of the journalism occupation, they are related. Though my analysis of the occupational identity of reporters and editors at NatNews is aligned with other studies in journalism, being a member of NatNews is also important. The belief that 'we are the best' which I discuss in more detail in Section 4.1.4 represents this significance. Though it may not be how editors and reporters describe their occupational identity, the drive to enact this belief is influential and is present in the daily activities of both occupational roles.

Figure 4-1 Espoused beliefs and values



4.1.1 ‘Facts’ are the foundation

Rooting reporting in facts is a core belief driving the actions of both reporters and editors. My observation notes contain countless times when reporters or editors would question the validity of a finding and seek to triangulate or verify the finding:

Reporter A: Hey did you see this - points to screen - looks like they're cracking down.

Reporter B: Hmm...

Reporter A: [Rotating between Twitter, a government report, company website and email containing tip that the Competition Bureau is coming

down on [Event X]. The reporter is actively taking notes on pad and has a story folder open on the screen.] (Rubbing hands together) This should be good.

Reporters are the primary creators of editorial content. They are credible storytellers and tenacious seekers of truth. Part of enacting this occupational identity is doggedly pursuing facts that are buried, inaccessible or too time consuming for others to uncover. Reporters describe this part of the process as incredibly gratifying and a key reason for pursuing a career in journalism:

“But for someone like me now to have to like nail down the story with solid facts, getting people on the record to say things that I know are true and they can’t duck from it ... It's a very hard skill and I think that’s actually something that people appreciate” (Jessica: Reporter).

In addition to creating value for readers, the reporters at NatNews take pride in tenaciously digging for information. “You know [Name] is often right but you can’t quote him directly. You need to confirm it with a legitimate source. You start there but keep digging and find out somewhere else...It’s about trust” (Caleb: Editor). These quotes highlight not only the importance journalists place in factual rigor but also the benefits to the reader and the trust flowing from these activities.

Factual rigor is important for building trust and credibility with readers and sources, even though both journalists and editors are well aware that the word ‘fact’ may be misleading:

“When I started in journalism there was this whole notion that newspapers reported the ‘objective truth’, just the facts. That is just a bizarre assertion. If you don’t start with that [facts] then you are unmoored... as long as you

have that as your core then you have, you can move from that with strength to the notion of, ‘Given that I think these are the facts, I have to admit I don’t know everything and that this is a personal view so now I’m going to assemble my narrative with that in mind.’ If you don’t start with facts then you are in the rumor business” (Jeri: Editor).

In other words, the term ‘fact’ suggests that journalists have done their due diligence in verifying information to the extent they can make a judgment call as to the veracity of the information.

Editors hold daily story meetings to determine their coverage strategy and the importance of factual rigor is also evident in these meetings. Below is an excerpt from one of those meetings regarding a breaking news story:

Editor 1: We’ve got this photo on the attack for our cover.

Editor 2: We are trying to track down facts – there are a lot of rumors out there. Apparently the shooter had recently converted to Islam.

Editor 3: (scoffing) So, now just because he may have recently converted it is religiously motivated? We need facts. We need evidence before any of this is reported. Who’s on it?

Editor 1: So we hold the photo until we know. What’s our back up?

Ensuring content has been adequately sourced is one way to enact this foundational belief on the importance of facts. Additionally, meeting a threshold for factual rigor is one dimension in assessing the quality of content. As the above exchange illustrates, this is in direct tension with the reality that the story is a breaking story and other news outlets will be reporting on it. Conversations like this one highlight the importance

editors place on their gatekeeping function. Failing to report a critical incident challenges this belief. Balancing speed with rigorous fact checking and quality is also a prevalent tension in the above exchange. Managing the speed of work is not new tension as Mary, a former reporter, explains:

“This (speed) has always been a big part of it. I was on the phone confirming with one more source and my editor comes along and points at his watch indicating deadline is approaching. He pointed at the phone and motioned for me to get off but I wanted to confirm. As I was still on the phone he took a lighter and burned my copy.”

In other words, the belief that ‘facts are the foundation’ exists but there is tension within the belief about what constitutes a fact. The above conversation also highlights the reality that enacting one belief can create tensions with other beliefs (see Appendix G for coding examples of meanings and tensions within and between belief). Tension also exists between roles. As Mary’s quote suggests, her idea of adequate sourcing conflicted with her editor’s need to have the copy in a timely fashion. This example highlights that though editors and reporters share a common occupation, they are fulfilling different roles in the newsroom. Fulfilling these roles lead to equivocality in belief enactment.

Similarly, there are disagreements regarding what constitutes adequate and reliable sourcing. For example, editors must constantly balance deciding to publish a story in a timely fashion versus ensuring their sources are reliable. The below exchange during a daily story meeting highlights the tension. The event in question is appearing in other papers. Not reporting it in a timely fashion leaves the impression the journalists at

NatNews are failing to live up to their gatekeeping function on an event those at NatNews consider a core part of their coverage strategy:

Veronica: Audrey, we can discuss separately or now but I have a question.

Audrey: Sure.

Veronica: Competitors are reporting 3 sources that say [Event A] will happen on [date].

Audrey: I've read that and I know from the sources who they are – they are either no longer there or have an agenda. I personally don't think it will happen then as all the papers will report [Event B].

Veronica: I guess what I'm wondering is have we reported it out?

Audrey: Yeah – we have a few week ago – we mentioned it's a possibility – not sure what more you want.

Veronica: Are we planning on reporting it out?

Audrey: I think we did well enough.

There are several tensions in the above interaction. Event A is very public and Veronica expresses her concern that NatNews needs to be proactively covering this. Audrey agrees but is not convinced the sources other publications rely on are sufficiently reliable. Her concern is misreporting potentially damages readers' trust and integrity. Veronica is concerned reporting a key event late compromises the relevancy of the information and NatNews' expert image. Erwin, a reporter, explains this tension further:

“Speed was always important but has become very important. On the other hand, there are people now who are very deliberately stepping back from that. I think a lot of news outlets were burned after the Boston marathon

bombings, so much wrong information was out there. Same thing with the shooting in Ottawa - so much wrong information. There's pressure to be fast, but there's equally pressure to be right, smart, analytical and good.”

These examples highlight the importance placed in enacting the belief that facts are the foundation of good journalism. They also illustrate, however, that there is variance in what meeting this threshold entails. Ensuring the factual rigor threshold is met sits in direct tension with the need to report stories in a timely fashion and how the editors are enacting their role as gatekeepers.

Factual reporting maintains the integrity of the content and builds trust with readers. Accuracy is also important in building and maintaining relationships with sources. The importance of accuracy is evident in the following exchange between a reporter and editor. The conversation took place 20 minutes before the final version of the paper was sent to the printers. The page in question has already been approved and sent to print. Though it is possible to recall a page and make changes, if it is late there are financial penalties thus once sent editors are reluctant to recall a page unless there is a factual error:

Reporter: (walks quickly over to editor) Did you see the headline on Story X? It's not accurate. We need to change it.

Editor: The page has already been sent and tough to call back...

Reporter: But he [referring to source] didn't say 'deserted'. He won't talk to me again with that headline. We can't say 'deserted' – that is not what he said. We have to change it.

Editor: Let me check if it's gone to typeset. If it has we'll be charged a fortune to call it back... (During this exchange another editor overhears and is checking on the status of the page in question. The page is recalled, the headline changed and resent in time).

Enacting the belief that facts are the foundation can translate to agonizing over the usage of a specific term or visual to ensure the content does not misrepresent 'facts'. The below exchange between an editor and graphics reporter illustrates this:

Graphics reporter: I was wondering if I could borrow your brain to check this graph for Monday. I just want to make sure I'm not misrepresenting stuff. You don't need to do it now but when you have time.

Editor (actively editing): Is this the correct term? (looking something up on his computer). That's what I thought – you need to change this to [term]. Also people are going to read this left to right so you need to start with this to put it earlier. It makes it clearer.

Trust and credibility are as important for NatNews as an organization as they are for the journalists working there. Readers and sources must not only trust the journalists, but the organization the journalists chose to associate themselves with. A common phrase in the newsroom is, "We are only as good as today's paper." Executing on this, however, is not straightforward. Not only are there a variety of definitions for what constitutes a 'fact', verifying them and then creating the content takes time. There is constant pressure to publish quickly, but the general consensus at NatNews is facts are the foundation and they will sacrifice 'being first' for facts. The various thresholds used to categorize a specific piece of information as 'fact' make enacting this belief less than straightforward. To reiterate the end of Erwin's above quote, "There's pressure to be fast, but there's

equally pressure to be right, smart, analytical and good.” In other words, reporters and editors at NatNews consider facts, accuracy, integrity and trust essential components of high quality editorial content (see Figure 4-2 for more information on more components of high quality content).

One reason the pressure to have factual rigor may trump other beliefs stems from the belief that ‘we are the best’. As opposed to creating tension to be resolved, the belief that NatNews is the best has an amplifying effect on factual rigor. As Tiffany states:

“The worst thing that could happen at NatNews is if you get reckless. That's never going to happen because they understand the mission here and that is to be credible. To be the number one source for news in the country... But when they're really big stories, if NatNews has been beaten then eventually they will find a way to get ahead of [other publications] with really credible reporting.”

The exchange between Veronica and Audrey regarding reporting on a specific event highlights the tension between speed and accuracy. Though both editors emphasize facts, how that threshold is met varies.

Finally, NatNews is a for-profit organization, thus facts are important but so is generating sufficient revenue to remain in business. As Keegan, a reporter, explains, this also influences how ‘facts’ are enacted in various activities in the newsroom:

“If we don’t have people [a photo, a personal story] to attach this to, we won’t reach, we won’t communicate. There’s this element of ... sort of entertainment. Knowing how to pitch things and obviously that can become very, it can become tawdry, you can get bogged down in things and it can become unethical. You can become involved in debates with your editors

where they say, “Let’s take this, bump it up” and whatever and you’re kind of, “Well, that’s not really this”. That’s not really what the story is or that’s misrepresenting it so there is always this tension I think between this very high-minded public trust. The notion that you’re this organ of democracy on the one hand and the other hand they need to sell newspapers and of course, in the newspaper business or now a website run based on advertising and subscribers.”

In other words, the way a story is pitched and ultimately edited and published can emphasize one aspect of the story over others. These may be factually accurate components of the story, but the presentation may not reflect the importance of the ‘fact’ to the overall story. Potentially misrepresenting information creates a tension between ‘facts are the foundation’ and another core belief I discuss in Section 4.1.3 of ‘we report without fear or favour’. Reporting without fear or favour refers to the importance of minimizing any potential source of bias or influence in the content. Keegan is describing a situation where the need to attract readers may cause reporters and editors to highlight certain aspects to achieve this end. Doing so, however, puts the need to attract readers over reporting ‘facts’ responsibly, thus challenging the belief of ‘we report without fear or favour’ and the next belief of ‘we are gatekeepers’. This tension is summarized in Figure 4-2.

4.1.2 We are gatekeepers

“I’ve always thought it [journalism] had an incredibly important role in society as exposing what’s going on. I haven’t done a lot of investigative work. I’ve done some, but it’s never been my focus, but I’ve always felt that that was a crucial, crucial part of the business. A) to keep people informed about what’s

going on and B) to uncover things that they need to know about” (Rita: Reporter).

The quote from Rita summarizes the importance reporters and editors put on their belief in the gatekeeping role they play. Informants describe the access to information as a funnel with unlimited information at the top and carefully curated content at the bottom. A fundamental role then is to determine what the news priorities are and act as gatekeepers on the flow of information. The gatekeeping function is a core facet of journalism and appears in early ethnographies of newsrooms (Gans, 1979) along with more contemporary work (e.g. Usher, 2014). Even while executing on this belief, however, editors and reporters experience tension.

The belief in gatekeeping manifests in an editor’s occupational identity as ‘we are curators’. Editors perform this throughout the day by discussing pitches, analysis and managing the overall news agenda. As Keegan’s quote at the end of the previous section indicates, editors are vetting pitches but both editors and reporters are presenting them. Editors pitch to each other and reporters pitch to editors. Her example shows how this pitching interaction can lead to tensions between beliefs as reporters who believe for whatever reason their story should be in the paper may pitch it in a way that best meets that objective. On the other hand, editors may favour specific types of analysis or messages and result in the type of conversation Keegan describes. In other words, one reason the beliefs exist in tension is each role has different ends they are trying to accomplish. These may be aligned but impacts how editors and reporters are enacting gatekeeping. Here is an example of a reporter pitching her idea:

Reporter: What do we have for [names a specific type of content that is considered premium]?

Editor: Nothing yet.

Reporter: Excellent I have an idea.

Editor: Good- what's up?

Reporter: Describes idea on how she can link 2 separate stories and pitches the general analytical angle. Concludes with, 'I'm not sure yet but kind of, [name of industry group] suffering or something like that.'

Editor: Do you think there's enough?

Back and forth and agree to pursue the story.

Editor looking at screen as reporter walks away: Let's say 120 to 140. [refers to the amount of text needed]

The reporter's desire to write a specific story ensures she pitches and positions it to meet that goal (editors are always seeking the type of content the reporter is asking about).

Pitching is a form of selling and this particular example is innocuous but does illustrate that pitching and curating are not without bias. Resource constraints are also apparent in this interaction as the editor provides guidance for how long the story needs to be. Thus the space in the paper determines story length as opposed to the quality or uniqueness of the content itself putting limitations on enacting the gatekeeping function.

Enacting the gatekeeping belief takes up a substantial portion of an editor's time and activities. As a result, time and resource constraints heavily influence how they perform this gatekeeping role. The below excerpt is from the end of a story meeting where all editors have already pitched their ideas and the general content has been agreed upon.

The section they are debating is a 2-page spread in the middle of the front section reserved for stories believed to be of interest and importance to the readership. These stories are visual, requiring graphics and photos to facilitate the storytelling. As a result, creating this type of story uses more resources than content requiring text and a simple graphic like a photo. At this stage of the meeting the editor who is chairing typically wraps up and provides guidance. Event T, the subject of the debate, is covered almost exclusively by NatNews and is considered ‘their file’, thus a key part of their strategy and gatekeeping role:

Ron: Who, honest show of hands wants to read 10 columns on [Event T]? One hand goes up.

Editor 1: I think it’s important. I read all our stuff on Event T.

Ron: We’ve broken out the issues. It’s pretty typical of something we’d run – but is it worth it?

Editor 2: Personally, I’d rather read 10 columns on poaching or any of the other debates swirling around Cecil [referring to the story of a poacher who shot a lion named Cecil].

Editor 3: Well, our coverage of Event T is crucial but maybe we’ve been too focused on [specific area]. Without being overly knee jerk populist I’d rather read about lions than Event T.

Ron: OK – Now who do we have?

Editor 1: It’s [resources] tight but we can do it – maybe get an intern to start pulling some numbers? General discussion on analysis and angles to cover ensues.

Several tensions are raised in the debate. First, editors must balance providing exclusive coverage on Event T, part of their core strategy, with offering coverage of a subject that

is currently being debated in the public sphere and being covered by other news outlets. The unspoken assumption here is that readers may be more likely to spend time reading about lions as opposed to Event T, suggesting that gatekeeping is not fully removed from readership. Consequently, there is tension even within the gatekeeping belief about how best to execute on informing the public – provide information to have an informed debate on Event T or provide analysis on the issues being discussed regarding the hunting of Cecil the Lion, a story that other news outlets are reporting. Informing the public is complicated by the fact that in order to inform the public, they must read it thus introducing the tension of readership. Second, NatNews is providing exclusive coverage of Event T and it is considered a coverage priority. Reporting resources are dedicated to Event T and other resources have already gone into creating a 2-page spread on Event T and the text is ready. Third, timing is also critical as both events in question are currently in the news flow. As Erwin explains:

“When a story is happening, you think people would be tired of it, but they actually don’t. When there’s a huge kerfuffle about something like Rob Ford, you could write the most banal thing on earth, and if it’s on the website people will click on it, because they’re looking for more, more, more, more information.”

Thus there is a direct tension between reporting on Event T, a part of their exclusive coverage, and offering their own analysis on an event that is topical, thus increasing the chances it will be clicked on and read. As the end of the discussion suggests, once a decision is made to focus on Cecil the editors immediately begin debating resources as the belief in being the best means the 2-page spread must be up to certain standards in order to be published. As the following brief conversation between two editors suggests,

editors will withhold publication if it is not up to a specific standard even if it is about a current new event:

“Hey, I held that story by [] as it was off. I mean he seized upon a tidbit but it needs to either part of or a follow up piece – not to come in advance of the story. There was no time to fix it but maybe for today?”

These examples show that executing on the gatekeeping belief is not straightforward. Altruistically, gatekeeping is about curating content. In reality, there are many factors influencing the enactment of this belief. As the example of reporting on Event T or Cecil shows, core values such as providing expertise and informing the public exist in tension which must be resolved to move forward.

The gatekeeping belief is central to not only the enacting of occupational identity, but is a strong motivator for editors and reporters:

“I like being in what I call the national conversation. So, when it's about business or politics - actually having an influence in that and that's what I actually like doing. I took a big pay cut to be here, but the value I get from being part of that conversation matters a lot more to me than what I was making before” (Jessica: Reporter).

Gatekeeping is also described as central to the societal role editors and reporters perform as the following quote highlights:

“We broke the story about xx and that set off a 3-year trail of reporting. We were able to bring that story from [Name] to the kitchen table. Moms' were worried about their sons and daughters...Most importantly people were asking questions” (Tiffany: Editor).

Based on this belief, one metric of success celebrated in the newsroom is when readers or governments adjust their actions based on content published by NatNews, “Did you hear? We just got an email outlining the recent successes... Proceeds to list of four government policy changes made as a result of coverage” (Miranda: Editor). Influencing readers and seeing evidence of this influence reinforces the importance of the gatekeeping function.

Reporters and editors are able to be effective gatekeepers because many of them are specialists or experts with connections to unique sources. Beat reporters, the majority of the reporters I interviewed and observed for this study, create editorial content on specific topics or industries. In one morning meeting Miranda makes the following comment about a reporter’s work:

“Did you see [Reporter name] on the [government press release]? That was genius – they didn’t say anything, there was nothing new. But [Reporter name] made a story out of it and a good one at that.”

The specialization of beats allows reporters to create content quickly as they have a clear understanding of the background but also access to sources to confirm the veracity of their analysis. The importance of speed is evident in the below exchange between editor and a reporter at 12:30pm:

Gloria (Editor): I think we need some analysis on [government regulation].

Robert (Reporter): Hmm... can include what type of person would be most likely to take advantage of the offer. The financial services industry hasn’t been that vocal on it but I doubt my sources would think they’d be against it.

Gloria: So what angle do you think works? What’s the hook?

[Brief discussion]

Robert: So do you want this for this afternoon?

Gloria: Is that enough time?

Robert: Yeah, no problem. Just open a folder and I'll make a couple calls and get started.

The deeper the level of expertise, the smoother the editorial content creation engine runs. One reason for this is because most beat reporters prefer to be self-assigning, or pitching story ideas. In spite of this preference, stories are also assigned out to reporters:

“Most of my bigger stories are mine. I mean there was one a couple of months ago that my editor assigned and it turned out really well. But a lot of it is self-assigning. I've got a better knowledge of my beat and what would make a good story. I try to let my editor know on Monday what I'm working on or if I need my plate cleared. And there's always breaking news that happens and we all pitch in” (Trevor: Reporter).

The frequency of assigning out (versus self-assigning) is related to the news flow, expertise and reporter availability. The depth and quality of coverage in the newspaper relies on reporters pitching and surfacing ideas:

“I'm responsible for the coverage [of beat]. That doesn't mean nobody else writes on it, but I'm the person at NatNews that drives it. My editor says come to us and keep us up to date with what's happening in this space cause you're responsible for it. So you can go to them and say, here's something I'm seeing that's interesting, do you want a story on it” (Samuel: Reporter).

Thus you can argue that reporters are directly connected to the value-added and differentiation strategy of NatNews. From an occupational identity perspective,

generating stories organically from their beat is central to the work activities of reporters. Frank, a reporter, states, “ Reporters work their beat and generate stories that way. If a reporter is not generating stories then you need a different reporter - they should know it [their beat].”

Having access to specialists is also essential for editors in executing their gatekeeping role as conductors in the newsroom. One of the main functions of editors is coordinating resources to produce digital and print editorial content to align with their coverage strategy. These activities include prioritizing the short and long term coverage strategy and ensuring there are sufficient resources allocated to meet strategy objectives. As highlighted in an exchange between an editor and a reporter, editors actively manage resource allocation:

Benjamin (Reporter): I’ve got to run, I’m going full tilt on the [] story.

Martin (Editor): Okay. I need an update when you get back. You see that board over there? It’s our list of upcoming big projects and there are a lot of question marks for August - we need stuff.

The below exchange between editors is typical of a conversation in the newsroom and illustrates how important editors rely on expertise to perform their role as conductors and gatekeepers:

Miranda: Big decision is how much Greece to do – with all this happening we need something for the front [first page of the section].

Warren: Maybe a market look? How does this play out to next Monday?

Henry: Well who can do it?

Miranda: How about if [Reporter 1] does an analysis on...

Warren: He can't do it, he's on xx today, but go on.

Miranda: Well, we can focus on the economic angle instead with some market stuff.
Who's in?

Henry: How about [Reporter 2]? Do you want me to go and ask her?

Miranda (hesitating): Well I normally wait for her editor to come in to ensure she's not doing something already.

Gloria: She only writes for Monday and Friday so you're good.

Miranda: Okay – I'm going that way so there is no reason all of us need to walk over there.

10 minutes later

Warren (looking over at another editor): Hey is [Reporter 3] in today?

Nate: I think so, why?

Warren: Well we're thinking of a Greek thing on the markets – short term and long term expectations. We already have [Reporter 2] but she's covering a different angle.

Gatekeeping then is central in the newsroom but is enacted differently based on the role and key contextual conditions such as timing, access to sources, expertise and availability of resources. The desire to inform the public and share their expertise is a prime motivator behind this belief. Though the values and beliefs are shared, executing on the gatekeeping belief requires editors and reporters to resolve tensions with contextual conditions that impact how the belief is enacted. Editors and reporters must also strike a balance between adhering to other beliefs such as factual rigor and gatekeeping. These

tensions between beliefs, however, ensure the gatekeeping belief is enacted in a way that adheres to NatNews' standards and expectations (see Appendix H for more coding examples of beliefs and tensions). The examples show, however, that pressures such as attracting readers influence gatekeeping decisions. Finally, the above discussion illustrates how both reporters and editors rely on expertise and specialization to enact this belief efficiently given the constraints they operate under.

4.1.3 We report without fear or favour

“It means that you pursue the story even when there may be some negative consequences for yourself. I mean, I'm not a war correspondent and I'm not sure I have the nerve to be one, but you see people out there who go after stories at great personal risk...because they think it's important to get that information out and to the public. Or favour, and that means not looking to advance my personal career on the backs of the stories that I'm doing, so be as fair as I can be and not to curry favour with corporate interests that I might get a job later, or whatever. You go where the story takes you” (Sally: Reporter).

Reporting without fear or favour refers to the idea that as much as possible, journalists should report an issue with minimal external influence and bias. Reporting without fear or favour and the enacting of it ensure journalists are accountable to their sources, the information and readers:

“The idea of a free press is autonomy...There's a fundamental idea we are going to do our very, very best to bring this information to you, to tell the story to you in the most responsible way we can, and not allow our reporting or coverage to be influenced by any untoward factor, nor by our own economic interests. To the best of my ability I'm presenting them with

something that is independently reported and not influenced by external factors. That is the bedrock of the readers trust. When I speak to companies and they say can I vet my quotes with you before you print, I'm saying no, no. I'm not your PR outfit" (Samuel: Reporter).

Similar to the previously discussed two beliefs, reporting without fear or favour impacts how editors assign stories as illustrated in the quote below:

Martin: Yeah, Ron had a great idea on the Event T coverage – maybe there's an angle on sugar? He can't do it though he owns Rogers stock.

Miranda: Good idea. Has anyone spoken to [] or []. I don't want to trip on anyone if someone is already coordinating.

Martin: I think they're tied up. Let's get one of the interns working on it – they can get 'granular' first.

Reporting without fear or favour also refers to the divide between editorial and advertising that many refer to as the 'separation between church and state', meaning the need to separate the content creation (editorial) and revenue generating (advertising) sides of the business to ensure there is no influence. Ted, a senior manager with experience in advertising states:

"We had one person whose name I will not mention, he was pretty high up on the editorial side. You couldn't even talk to him if you saw him. If you were in advertising, you couldn't even say good morning to him. He would not acknowledge, or he'd get really pissed that you even had the audacity to talk to him."

The animosity between editorial and advertising is echoed on the editorial side as one editor describes, "I interact much more with advertising now. I used to pride myself in

not knowing where they existed in the building...It was a bit scary at first, there was this church and state wall that you did not cross.” These quotations coupled with Samuel’s quotation describing autonomy illustrate how deep the traditional divide is.

Completely separating advertising and editorial is an ideal. Some acknowledge that even though reporting may not be directly impacted, advertisers do impact the editorial process. Keegan explains:

“If you look at it – why do newspapers have Wednesday food sections? Because it’s the day of the supermarket flyers. There’s been a marriage between travel sections and advertisers. The travel advertisers are told what day it’s going to be, you know, the stories on certain destinations, or whatever so they can pair the ads. So there’s often been, these, you know, ‘closer relationships’. And, film, you know, movie ads, created the contemporary entertainment section. That’s why every newspaper has a Friday film section and the movies will start for the weekend, and that’s when you put it in, the ads are there, and, so it’s a closer relationship between...there’s a sense of pairing the contents with the ads.”

So, though the ideal is that advertisers and editorial are completely separate the reality is somewhere in between. I also witness this on several occasions. One day early in my observations editors are searching for content to fill a page. When I ask why they can’t use the list of stories they have in front of them the editors stated there is advertising tied to the page so they needed a certain type of story to fulfill the advertising requirement. Tiffany, an editor, also explains how copy on a specific topic can be loosely tied to advertising:

“[In order to keep these ads] they need copy to go on that page. It can’t be a turn from page one on a story on X, so that’s partly what they are responsible for. It makes sense [from an editorial content perspective] to have that section but it may just be a matter of volume that comes up if the advertising leaves.”

Advertising not only has some influence on the type of content but also on how much content is published as the amount of advertising determines the number of pages in each section of the newspaper. “There is always a ratio – if the number of ads goes up then editorial goes up – newspapers get bigger” (Senior Manager). The belief of ‘we report without fear or favour’ suggests there is no outside influence. The reality of the structure of the newspaper, where advertising appears in papers alongside editorial content, impacts the enactment of this espoused belief.

Sources also contribute to the enactment of the belief in reporting without fear or favour. Two conversations between reporters and their editors highlight this reality as both involve securing or maintaining access to important sources in order to verify information. Their access, however, either explicitly or implicitly is not without consequences that directly impact either the autonomy and/or the objectivity of the reporter:

Benjamin (Reporter): They said they’d help me out and put me in touch with their Head of XX. They also mentioned [Name of award]. Now there’s a scoop for you (sarcastic)... I’ve already agreed I can do something in exchange for an exclusive.

Martin (Editor): Hmm I’m a bit leery of the award thing.

Benjamin (reporter): Maybe I could just get it in there and move on? The interview would be tomorrow and embargoed until Friday morning. It's a good contact and I'll make it as un-promotional as possible.

A slightly different conversation occurred in a discussion regarding whether a company's annual meeting was worthy of committing internal resources to covering. At the meeting the reporter and CEO have a brief conversation thus the reporter is concerned if he does not cover the event, the CEO may be less apt to return his calls in the future:

Robert (Reporter): I just came from their meeting and not much happened. They are doing x, but [name of wire company] was there so they'll likely cover that.

Henry (Editor): It's up to you. What do you think?

Robert: Well I did briefly chat with [name of CEO], so he knows I was there...

Henry: Hmmm. You can write something if you want and we can determine where it goes after.

Both of these examples run contrary to the ideal of 'report without fear or favour,' but sit in direct tension with ensuring reporters have access to sources. Maintaining access to sources is an essential factor for adhering to their belief in factual rigor as well as their gatekeeping function. As the above cases suggest, the beliefs and values in the newsroom are ideals and resolving the tension between them is a part of everyday activities outlined in Table 4-1 below. The flexible enactment influences how both occupational roles enact their identities in the newsroom. For example, depending on the context, reporters who see themselves as 'tenacious seekers of truth' may need to balance this with maintaining access to key sources. Editors view themselves as curators and drivers of the news agenda responsible for setting the overall coverage strategy for their

area of NatNews, but the context within which they enact is not static. As a result, the enactment of their identity is flexible and adapts to the immediate context and decision being made (see Appendix I for more coding examples of tensions within and between this belief).

4.1.4 The final two beliefs: Speed is important and ‘we are the best’

4.1.4.1 Speed is important

The belief that speed is important is evident in the examples provided in the above sections. The need to be timely is important and must be balanced with the other beliefs of factual rigor, gatekeeping and reporting without fear or favour; a reality explained in the prior sections. In other words speed is almost always a source of tension in the newsroom. Usher (2014), who conducted an ethnography in the New York Times newsroom, makes the same observation and makes a distinction between immediacy as a functional or emotional value:

“Journalists don’t talk about immediacy as a ‘value’. In fact, to some degree, immediacy seems imposed by technological forces of digital production seemingly outside journalists’ control, such as the speed of the networked information environment, for instance. But ultimately journalists are the ones deciding that immediacy matters - and this value is articulated by the emphasis on a variety of actions and strategies to create content” (p.148).

My data leads to a similar conclusion about speed, and I include it as a peripheral belief in the newsroom. As Usher points out, the belief that speed is important directly

influences the activities in the newsroom. For this reason I include ‘speed is important’ as a belief driving behavior.

In addition to creating tension with other beliefs, speed also impacts the types of activities reporters and editors engage in as well as the frequency:

“I would say over the last 10 years it's - well obviously the emphasis on digital and here it's moving from digital that big wide spectrum of digital to mobile. So the emphasis is on speed. Before you had to meet a deadline - had to have your copy in by 9pm. But that was it. As long as you hit that deadline you were fine. Now, in political, business, sports reporting you can be on Twitter all day long and Facebook and taking pictures and you know the reporters now it is a luxury to just be a writer. A 25-year-old reporter coming into the newsroom needs to have lots of different skills. At the end of the day, the most important thing is to be able to write. That hasn't changed in hundreds of years but you have to do it so much quicker and the danger is there is so much competition among various media.... There's a big emphasis on getting it out there and getting it right” (Tiffany: Editor).

In other words, the importance of immediacy puts pressure on the belief that facts are the foundation as content must not only be correct, but it must be timely. The belief also impacts how and when activities are enacted. For example, in order for a story to be posted quickly, it is ideal to have an accompanying photo, video or chart:

“There's a lot more emphasis on making a story interactive so including things like charts. We have this tool now where we can just dump some excel data in and it makes the chart. You fiddle with it to make it readable but it takes like 5 minutes as it takes as long as it would to email the data and explain to the graphics person what you want” (Samuel: Reporter).

Samuel prefaces this by saying it is something he would not have done even a year ago because there was less emphasis on including charts and the technology wasn't there. So the notion that speed is important is also driving the activities of reporters as they are expanding what they do to meet the changing demands on what quality content includes.

Erwin, a reporter, elaborates on how speed impacts a reporter's activities:

“News reporters now go to an event, tweet the event, maybe do a video hit, write a story, tweet again later in the evening and then there's an update. It's become a much more 24-hour thing than it ever was before. I think most of us wake up and check our newsfeed and Twitter and I wouldn't have done that 10 years ago. There's no off.”

The focus on incorporating social media is not universal. Henry comments, “I'm so internal [not focused on external promotion of content]. I should be more public but I'm not and I really don't care.” Similarly Trevor, a reporter, states:

“There are days when there is a lot of news that I'm very distracted and that affects the quality of my writing. So the days I'm working on a story that requires deep thought I have to turn it [Twitter] off. And sometimes I just stop tweeting for a few days or weeks if it's a really important story. It's too much noise.”

In other words, though the belief that speed is important is universal, depending on the context editors and reporters enact this belief differently.

The emphasis on speed also contains potential risks regarding the quality of content produced. Erwin describes the negative potential impact of speed, “The rush to judgment is extraordinary. I mean something happens and there is a blog post up on [name of other

publication] within two hours. I think, “You can’t have thought about this, no one thinks that fast. So it becomes shallow and you lose original thinking.” As Erwin goes on to explain, organizations like NatNews combat this by focusing on analysis and coverage that sets them apart from the competition:

“So NatNews is good in that there are so many people here who have a depth of knowledge so when breaking news happens, like a Senate scandal, there are so many people who’ve been covering this and they can draw upon [their knowledge] and are able to be smart and authoritative. This is how you set yourself apart from the pack; having knowledge and being the authoritative voice.”

Based on this quote we see that expertise, a key component of a reporter’s occupational identity, is an important factor enabling them to produce content that meets the high quality standards of NatNews quickly. As this dissertation and other studies in journalism have noted, the information flow in a newsroom is constant and immediacy is a core belief that is balanced by the presence of the other beliefs. In particular the next value of ‘we are the best’ helps to attenuate this tension (see Appendix J for more examples of tensions involving speed).

4.1.4.2 ‘We are the best’

There is a strong belief that NatNews is the most prestigious daily news provider in Canada. Performing this belief supports their commitment to creating quality and influential journalism. An earlier quote by Jessica explains this commitment, “I took a huge pay cut to be here.” Or Tiffany mentions, “When NatNews offered me the job, I

couldn't resist. I was going to leave journalism but decided to stay." The belief that 'we are the best' pervades the organization regardless of how true you believe it to be:

"I don't think they're just saying it. I really think it is the driving force of the organization, that we really believe we are the best. Again, call it peer pressure, I don't know what you want to call it, organizational pressure, but there is just the sense that it can't be just ordinary. Some days it is, but there's still that feeling that you've got to try to make it better" (Deborah: Reporter).

There are several ways this belief is enacted that attenuates the negative tension felt by immediacy and amplifies the three core beliefs in the prior sections.

First, as Erwin explains in his quotes, there is incredible pressure to publish content before other news organizations. Deborah provides an example of how editors and reporters combat the pressure to publish:

"I said this to somebody just the other day. I can't remember why, but that when we're having one of those days where we just don't feel like it, where the story is just not coming together the way we want it to, where you just want to kind of throw up your hands and just say, 'To hell with it. Let's do the bare minimum and I'll get out of here.' There's always a little thing in the back of my head and I think the heads of pretty much everybody I work with that I'd be letting down the rest of the room, that it's just not good enough to mail it in, even if that day that's your instinct, so you make the extra call, you take another look at what you wrote and see if there's some way of making it more meaningful."

Deborah is describing how the belief in 'we are the best' reinforces the belief in verifying information and communicating it to the best of their ability. Jeri, an editor, also

discusses how NatNews attempts to minimize the immediacy belief by focusing on being the best:

“So [name of other publication] has 60 stories on their homepage and they’re constantly moving them up and down and in and out the whole time. We see ourselves as why people would come to us and say, ‘I want to know what the 10 most important things are so if you could just tell me that and if I want to dig deeper I can.’ So, here are the 10 right now and a gentle churning of that, not too fast.”

Jeri’s quotation highlights the importance placed on the gatekeeping belief and role the editors play in enacting this belief.

Secondly, Isabel, a reporter, explains how the belief in being the best also impacts her gatekeeping function:

“You know there’s a lot of competition for news, and news doesn’t stand out very much, especially today, when there’s so much competition. Whereas a well told story about a subject that the reader never expected to read about but finds themselves carried along, that is rarer and has become a much more valuable commodity as time goes on...most of NatNews increases in readership come from this type of content.”

In other words, this belief helps her select stories for pitching to her editor and comments that adhering to this drives readership. Other previous examples highlight how readership sits in direct tension with enacting a belief. In other words, the belief that NatNews is the best minimizes the omnipresent tension that immediacy plays in the newsroom by reinforcing the core values driving editors and reporters.

Third, ‘we are the best’ also reinforces the fundamental belief in reporting without fear or favour. Dayna, a senior manager, explains this:

“The standard that NatNews is held to is higher than other [news organizations]. So the trust level has to be not only what you are doing but what you seem to be doing. This means being brave or standing up for something. And we [as senior managers at NatNews] have to stand behind those that do this.”

In other words, the very notion that ‘we are the best’ allows reporters and editors to report without fear or favour, as it is a fundamental expectation of what is considered quality journalism (see Appendix J for more examples of the relationship between ‘we are the best’ and other beliefs). The reality of the current environment, however, does put tension on this amplifying effect:

“The core issue which is trust, and what is the one thing that NatNews has more than any other publication, I would say is people trust us and people value that. I do think that NatNews, at least to me, and I think this is the same for a lot of reporters at NatNews, specifically, is like, has always held a certain cache. It's always represented something. I wanted to work at the NatNews. I didn't want to just be a journalist, I want to work at the NatNews. That is why these new areas are murky” (Jessica: Reporter).

Jessica is referring to the increase in a specific type of sponsored content that some reporters and editors feel allows the advertisers too much influence over the editorial direction of the content. For her and others who share her views, part of ‘being the best’ is minimizing any external influence as it could damage the trust in NatNews, the content and the journalists themselves. The reality of declining revenue, however, means that NatNews is forced to experiment in new ways as they renew their strategy. Engaging in

strategic renewal has implications outlined in the examples above such as finding new sources of revenue as Jessica discusses, expanding traditional reporter activities as Samuel describes in his adoption of making charts or incorporating social media when creating content as Erwin describes in his aforementioned quote. Furthermore, NatNews is engaging in strategic renewal when all of the above enacting of beliefs and resolving of tensions takes place in a resource-constrained environment.

Before I begin my discussion on resource constraints, I include a summary of some of the activities and occupational identities of reporters and editors in Table 4-1 below. The below table is by no means exhaustive, but does summarize the majority of activities both occupational roles engage in, or ‘what journalists do’. It also summarizes identity statements outlining ‘who we are as journalists’. The examples in the subsections of Section 4.1 provide instances of how the beliefs and values both drive the activities of these two roles, but also how engaging in these activities requires members of both roles to balance the tensions arising from the activities and the roles themselves. There are two labels in the table – primary and secondary activities. I use the label ‘primary’ to refer to activities that all members of each role engage in at some stage during the day. The enactment may differ from person to person, but the activity itself is consistent across members. ‘Secondary’ refers to other activities either witnessed or described but for which there is greater variation in terms of frequency of enactment. For example, not all reporters or editors create video content and even among those who do, the frequency varies quite substantially. Other activities such as ‘making lawyering decisions’, referring to when a lawyer is consulted to review content for liability issues prior to content publication, are categorized as secondary simply because the activities are not

always required. I refer to this table in subsequent sections on how strategic renewal and occupational identity are related and more detail on the relationships between these activities can be found in Appendix E, Appendix F and Appendix K.

Table 4-1 Outline of key activities for reporters and editors

	Reporters	Editors
Identity (Who are we)	We are credible storytellers We are tenacious seekers of truth We are experts	We are curators and drivers of the news agenda We are conductors We are coaches and teachers
Primary Purpose (What is our purpose)	Create content	Manage content strategy for section*
Motivation (Why do we do this)	See beliefs and values diagram (Figure 4-1)	
Primary Activities (What do we do) (Daily or multiple times daily – frequency of enactment is consistent across participants)	Connecting: Meeting and talking with sources and potential sources for the purpose of building rapport and trust, access, maintaining and developing beat specific expertise	Assigning stories: Both short and long term
	Sourcing: Uncovering ideas (multiple sources such as networking, events, reviewing reports, media and other beat related activities)	Curating: Selecting stories for publication
	Reporting: All research related activities which may include sourcing, connecting but also: analyzing, reviewing publications, contacting subjects, triangulating information, gathering data, running calculations, etc.	Vetting pitches (internal): Both short and long term
	Pitching stories to own or other	Editing overall narrative: Suggesting art or graphic alternatives
		Editing content: Providing feedback on

	managing editor (self- assigning)	story angle, flow and structure
	Writing: Building the narrative, revising and updating	Discussing story angles with other editors
	Updating managing editors on story progress	Vetting pitches (external): Typically through email
	Developing and maintaining expertise which can include attending relevant events, researching, reviewing publications, etc.	Prioritizing content for coverage strategy: Drive agenda
	Managing and prioritizing active stories (e.g. breaking, scheduled, investigative)	Managing resources: Discussing reporter assignments with other editors
	Clarifying story assignments with own or other managing editors (being assigned)	Participating in story meetings
		Managing story scheduling in system
	Organizing day around deadlines	Categorizing stories: Based on location and/or subject matter.
		Reviewing and approving section fronts
	Interacting with colleagues: Regarding collaborations, editing, socializing	Reviewing competitor publication
		Writing or suggesting headlines (predominantly for section front)
Secondary Activities (Multiple times per week or as needed- frequency varies substantially)	Suggesting headlines for stories (depends on reporter)	Making lawyering decisions
	Collaborating with other reporters on stories (co-authoring)	Promoting stories on social media
	Sourcing supplementary information for text stories	Creating primary video content
	Creating primary video content	Managing reporter performance including coaching, skill development, etc.
	Participating in meetings on long term projects	Reporting and writing stories
	Promoting stories on social media	Managing long term projects
	Participating in committees	Participating in committees
	Developing supplementary content (creating charts, shooting	Liaising with editors in other sections

	video, taking pictures, etc.)	
	Participating in community events (speeches, moderator, panel member)	Developing long term coverage strategy
		Participating in community events (speeches, moderator, panel member)

4.2 Exploring the resource context

Resource constraints come in a variety of forms at NatNews. Section 4.1.4.1 discusses how time constraints impact the activities of reporters and editors in the newsroom. In addition to time constraints, editors and reporters experience resource constraints in the form of physical space (for the print newspaper), expertise constraints when beat reporters may not be available to cover a specific story, financial constraints when there are insufficient financial resources to create the content desired and input constraints when there is a mismatch between what ideas are being pitched and the need to create a daily print and digital products containing new analysis and content. Adapting to changing contextual conditions is part of the everyday activities for both occupational roles. In one morning meeting Warren, an editor, states, “Today the fed report comes out but we’ve got no econ reporter available or anyone who is econ minded so we’ll look for a wire.” NatNews typically offers in-depth economic analysis, however, the contextual conditions demand flexibility. As an editor, Warren adapts the enactment of his identity, as the curator of economic news, to the fact there is no internal expert available to provide this content. The resource constraint does not prevent him from enacting this part of his identity but instead he quickly determines that covering the news is important to the coverage strategy and sources the content from an external wire service.

The need to have new content on the website may also impact how ‘we are the best’ is enacted as the below conversation shows. Both editors agree the content may not necessarily contain the level of analysis or depth that is ideal but Editor 1 acknowledges that in this particular case, newer content trumps having content that may not always meet ideal quality standards:

Editor 1: It’s a slow morning, what do you have?

Editor 2: Well, Jonathan is working on a piece on [Company Name]. It’s nothing earth shattering or anything so we don’t need to necessarily get up soon. I might even send it through for another edit.

Editor 1: At least it is news – something to read.

This is an enactment of space constraints and the above conversation illustrates the tension between available resources versus the need to have new content. A different example from an afternoon meeting highlights how space, availability of resource and the flow of news are important factors in editorial decisions:

Editor 1: I’ve got a couple potential ones. Becky is working on the angle for [Company Name] and Robert is on the skirmish as a result of that report. Depends on what they can get.

Editor 2: Yeah, we have that story Andrea’s been working on a while with those jobs going unfilled.

Editor 3: Is there good art with that?

Editor 2: I’m not sure but it could be a reason to hold it. She has some great examples.

Editor 3: Hmm... sounds like it might be good for the front but we need art.

Editor 4: What's our space? I want to talk about the front, we may have other contenders for the 'centerpiece'.

Having relevant news to report on is a key input and some editorial meetings conclude with 'we have a lot to chase' and others with 'it's looking pretty thin'. Availability of news is important but it is not independent of the space and resources available to report the news. Both of these contextual conditions determine what type of content is selected for publication. In the above exchange, the editors are concerned with deciding on a 'centerpiece', the main story on a section front [front page of a section] of the paper that is typically accompanied by 'art' (photo or graphic). Their concern is that the text story meets their quality and content requirements for this type of story but they may not have appropriate art and are considering delaying the publication of the story because of it, triggering Editor 4 to discuss alternative stories that may meet the quality and availability of art hurdles.

Editors are conductors and drivers of the news agenda, thus making decisions about what content to publish and where is a core part of their occupational identity. The space in newspapers is finite and resolving tensions regarding what news stories to pursue and where in the paper to publish them is part of the role of an editor as several above examples illustrate. There are tacit but clear guidelines for these decisions and the locations of section fronts have nicknames (e.g. 'centerpiece') to expedite this process. These nicknames are convenient during conversation but are also quick ways to communicate the quality of content. Content being considered for the front page of a section is viewed as higher quality. Content that has deep analysis and insight, is deemed essential public information, taps into unique sources, provides an alternative viewpoint

and leverages the expertise of their reporters are all examples of content reserved for these prime locations. The belief that ‘we are the best’ drives the creation of content meeting these criteria.

As in other previously cited scenarios, the reality of speed and time constraints can compromise the meaning editors and reporters associate with quality. One editor laments to me:

“I wish he’d presented the other side. I think it looks better if we acknowledge the other side of the debate. But I guess it did what we hoped – started a conversation. Oh – I suggested it, but it didn’t make it in. He filed late and there was nothing wrong with the story so I didn’t push it. [Shrugs shoulders].”

In other words, if there was more time the editor may have pushed the reporter to provide more balanced reporting, something both roles value and associate with quality. The above interactions highlight the need to balance tensions between space, availability, setting the agenda, coverage strategy, resource availability and ensuring the content has the appropriate facts as the foundation.

The current operating environment also creates financial constraints, meaning there are trade-offs with regards to providing the ideal content versus the availability of financial and adequate reporter resources. “Our budget is pretty tight and we work with a lot of freelancers. We have to have stories that are good enough to run in the paper and it can be a lot of work finding people to do that” (Caleb: Editor). Some areas of NatNews have more reporting resources than others, yet all content must meet a certain quality standard, putting pressure on editing resources:

“I got a piece from a freelancer and it just didn’t seem sophisticated enough [but I needed content]. We published it but I felt horrible. NatNews shouldn’t be publishing stuff like that. The editors on the desk working on it were like ‘What the heck is this?’ and I said you should have seen in it before I reworked it. They are used to getting stuff from NatNews staff who are really good writers” (Sheldon: Editor).

In spite of the acute awareness of what quality standards are, the reality of fewer reporting resources means some editors may have to compromise on quality standards, putting direct tension on the belief of ‘we are the best’.

The above quotations highlight how, in a financially constrained resource environment, trade-offs are being made. Financial resources can also impact the gatekeeping functions of editors as illustrated in this conversation between an editor and a photo editor. They are discussing the art options for the ‘centerpiece’ story on the section front:

Editor: Can we look at art for Company 1 as Company 2 is getting visually tired?

Photo Editor: We have a ton of footage on Company 2. We’d have to go wire for Company 1. (Showing some photos on Company 2). These are pretty good and we haven’t used them before.

Editor: I really prefer to change it up. Can you look?

The conversation between the editor and photo editor highlights the importance of utilizing resources in a financially constrained environment as the photos in question have been taken and paid for. Additionally, the photos on Company 2 are proprietary thus meeting the quality standard of differentiation. As the editor in the interaction states, readers may be tired of seeing pictures for that particular story. In the end the photos for Company 2 ran on the front page being debated above.

As the interactions shared in the above sections show, as opposed to being rigid, the enactment of beliefs and values by editors and reporters is flexible. Editors and reporters engage in activities and embrace this flexibility in order to reconcile tensions between the ideals and the immediate contextual conditions. The belief of ‘we are the best’ is a key component in managing tensions and maintaining balance as editors and reporters commit to creating high quality content.

The finding that the foundational beliefs and values underlying occupational identity are flexible leads me to my next observation that occupational identity can both help and hinder adaptations during the strategic renewal process. As opposed to only acting as an obstacle to renewal, the flexibility created by constantly balancing beliefs and values enables members to adopt new activities in order to get the job done. In the next section I explore how occupational identity is both helping and hindering a substantive shift to delivering on the product strategy at NatNews.

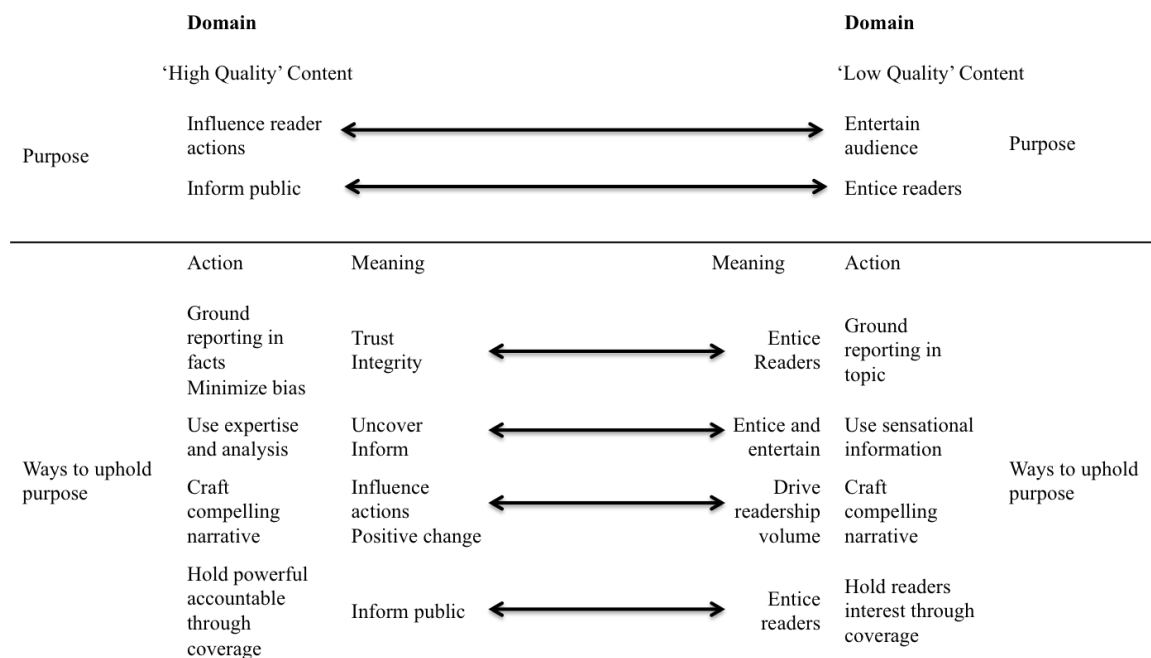
4.3 How occupational identity helps and hinders strategic renewal

In Section 4.3 I show evidence that occupational identity has mixed effects during strategic renewal as it both enables and impedes the activity changes necessary to implement the strategic initiatives. Drawing on the occupational identity outlined in Section 4.1, I provide three vignettes illustrating how editors and reporters use two mechanisms to adapt their activities in the newsroom: adjusting associated meanings and evaluating feedback metrics.

In these vignettes, I show how these two mechanisms lead to mixed effects where occupational identity both helps and hinders the overall strategic renewal process. To be

clear, NatNews is implementing all of these strategic initiatives, but the ease of implementation varies across initiative. I chose vignettes that are representative of some of the changes being implemented as part of the renewal process but also to provide three different examples. One where the enabling effect has more momentum, one where the inhibiting effect has more momentum and one where both effects are similar in terms of enabling and inhibiting momentum.

In Chapter 3, I explain how I use domain and semiotic analysis as outlined in Barley (1983) and Feldman (1995) to interpret my data and arrive at my findings. Figure 4-2 contains the domain analysis for editorial content, which is central to my findings around the importance of meaning and supports my findings in Section 4.2. I include it at the beginning of the vignettes to orient the reader as the meaning shifts covered in the vignettes below are directly related to the tension strategic renewal places on these meanings. I use the labels ‘high quality’ content and ‘low quality’ content to represent opposite ends of a continuum of editorial content as opposed to rigid categories. The arrows indicate there is an inherent tension between elements, not mutual exclusivity or opposite ends of a spectrum. For example, I show that one purpose fueling the creation of high quality content is informing the public and this sits in tension with enticing readers. Stating there is tension does not imply that both meanings cannot coexist as my analysis in Section 4.2 and supporting data in Appendices G – J indicate. I include a table outlining details concerning metrics as a mechanism in Section 4.3.4 after I present the three vignettes.

Figure 4-2 Domain analysis for editorial content

4.3.1 Putting more behind the wall: Generating revenue versus informing the public

Two years prior to this study, NatNews made a substantial shift in their digital product strategy by launching a metered paywall on their website. Prior to the change, readers had free and unlimited access to all content on the website. The context triggering a shift in digital strategy is important. Digital advertising generates far less revenue than print advertising with one estimate suggesting twenty-five dollars in print ad revenue is being replaced by one dollar in digital ad revenue (Edmonds, 2012). Coupled with trends such as a substantial decrease in classified advertising and the overall trend that advertising revenue growth in the United States is lower than inflation (Picard, 2008) means organizations such as NatNews must look elsewhere for revenue. Launching a metered paywall is one strategic initiative designed to generate subscriber revenue. The operating

environment also puts pressure on efficient resource utilization. The Publisher at NatNews is quoted in a news article on the launch of the paywall as stating, “At the same time, we've got to look at the existing costs of the business. As some of the traditional sources of revenue decline we need to look at where our resources are and make some shifts.” The external business environment highlights the need to quickly implement the new strategic initiative in order to maximize results.

The launch of the paywall limits free readership as visitors are able to access a certain number of free articles before the website prompts you to subscribe. In conjunction with launching the paywall, NatNews also began creating exclusive on-line content for subscribers targeting specialized analysis and expertise such as business and politics reporting called *Analysis*. There are guidelines accompanying what type of content is considered *Analysis*, and specific reporters are often tasked with creating this content though it does vary. Since the change happened prior to my study, many editors were already accustomed to making decisions as to what type of content would be labeled as *Analysis* and put behind the paywall.

During my field observations, NatNews launched a new app for the tablet and mobile that would eventually require subscription (at launch there was no fee). Part of this shift includes categorizing more types of content as ‘subscriber-only’ to ensure subscribers received value for their subscription dollars and to entice non-subscribers to take out their wallets. As a result, any content meeting more general criteria regarding investment of resources and uniqueness should now be put behind the paywall. Consequently, editors are confronted with two new tensions: is this particular content ‘good enough’ to

drive subscription revenue and do we want to potentially limit our readership of this content?

Though editors curate and coordinate *Analysis* content prior to this change, *Analysis* content has guidelines and is created exclusively for subscribers or potential subscribers. It is distinct from other content thus the question editors are accustomed to answering is: does this content meet the criteria to categorize it as *Analysis* (criteria previously determined to be valuable to their subscribers)? For example, during one morning meeting an editor was pitching content as *Analysis* for the business section. The particular type of *Analysis* content discussed below is reserved for reporting on potential mergers and important corporate deals:

Editor 1: [Name of publication] had a story on [Company Name] but they couldn't say much. [Reporter Name] is looking into it as he has a good relationship with [Person and title].

Editor 2: OK, that might work for the front. I'm still looking for some stories for the second page. Looks like we may have a good *Analysis* for a Thursday column – do you think we can pull that? (Meeting continues)

After the meeting Editor 1 confirms with Editor 2: [Reporter Name] will do an *Analysis* piece for sure – he confirmed the deal is going down today.

Evaluating content in terms of whether or not it meets specific criteria aligned with their coverage strategy is part of the occupational identity of editors as curators, conductors and drivers of the news agenda. An additional consideration in the above interaction is where the content will be published. The first two pages of a section are typically reserved for the most impactful journalism thus quality is an important factor when

selecting content. Editor 2 is concerned with finding content for page one and two and is looking for *Analysis* content as even though this content targets digital readers, by definition it typically contains a deeper level of insight than some of the alternatives. The above conversation happened on a Monday. One option they are considering is taking a column slated for Thursday, indicating there may be a lack of alternatives and the editors are trying to balance the tensions between availability of content, quality of content and space requirements. Resolving these tensions is part of the everyday activities of editors.

As a result of the strategic initiative to include more subscriber-only content, editors must now actively consider whether or not a specific article, not originally created for subscribers, will convert readers to subscribers. Categorizing content as subscriber-only introduces a new tension by forcing editors to potentially limit readership and thus influence of the content itself. Having influence by reaching a large number of readers is a value central to an editor's occupational identity. Editors are indirectly responsible for driving subscriptions as they control the type of content pursued, however, this was the first time converting subscribers would potentially limit the readership of content not specifically created for a digital subscriber audience. As the examples in Section 4.1 illustrate, the main focus of editors is on curating, conducting and coaching to execute on their coverage strategy to support their value of sharing their expertise to inform the general public. Their belief is motivated by the fact they are gatekeepers. Already the launch of the paywall challenged this belief. Monica, an editor describes:

“I was against the paywall because if you disseminate the news digitally to only those willing to pay for it, you shut out an audience. It's

important to be part of the national conversation. Like everyone else, we were trying to make money on page views and attracting as big an audience as possible. We've shifted now to trying to drive subscription revenue too."

One of the core values for editors and reporters is to have influence and inform the public. The established way to achieve this on a digital platform is to reach a bigger audience:

When the paywall launched there was some healthy scepticism. So we had to go out and sell them [editors and reporters] on having a smaller audience, and I think most people could see what was happening to the business around them, and get that this was a way to add additional revenue, and find more subscribers, and that subscribers would be more meaningful than fly by night free readers (Samantha: Senior Manager).

The notion of limiting readership is not consistently enacted or measured across the organization. As Mary, a digital editor states, "Our goal is to reach new people. We're looking at the top end of the funnel – those who wouldn't otherwise come to us." This sentiment is echoed in celebrations of success including headlines such as this, published one week prior to the end of my study period, "We've hit 1 million Twitter followers on @natnews.ca. Let's celebrate!" The importance of reaching a broad audience is reinforced in the newsroom where there are screens with the top trending stories in terms of digital readership. The story with the greatest readership is the top of the list of stories. On numerous occasions I would hear editors and reporters commenting, "Hey, did you see [name of story] – it's been top all morning." Or in a story meeting one editor commented about a particular reporter, "Do you have anything by [Reporter Name] for me? Something provocative [that will generate readers]?" In other words, there are

readily available metrics on the number of readers. These metrics reinforce the idea that attracting readers is one way to enact the gatekeeping belief and informing the public value of editors and reporters.

The shift to moving content behind the paywall introduces a tension between increasing the number of readers and generating subscriptions. “We need to figure out how to balance reach and conversion” (Dayna: Senior Manager). Making even more content subscriber-only sits in opposition to core beliefs and values in the newsroom and creates a tension needing to be resolved. Available and visible metrics highlighting the number of readers are readily available and even if you ignore the screens, statistics on most-read articles and social media sharing are provided in meetings and by email. The goal of attracting more readers is evident in the decisions editors make. The tension between trying to reach a large audience and encouraging subscriptions is apparent in an editorial meeting after the launch of the app. The article in question took many weeks and reporter hours to write and was not initially intended to be subscriber-only. It is a feature cover story in one of their weekend sections and contains information that most editors would argue is important for the general public. The story also captures the expertise of the reporter and editors involved:

Editor1: Do we make the cover red (nickname for subscriber-only content)?

Editor 2: Hmmm. What do you think?

Editor 1: Hmm. I’m curious to know what Editor 3 thinks. We did make [name of other cover article] red though...

Editor 3: Well it meets the criteria in terms of investment of resources and exclusivity but I'm agnostic really. Business-wise there's a huge interest in the content.

Editor 2: Good point. It's going to be the top of the news funnel and I don't want to deter the reader. This is important. So are we a no?

Editor 1: But the [story A] was red.

Editor 4: Is there anything exclusive in it – will it make news elsewhere?

Editor 2: I expect it to be widely shared.

Editor 4: So we don't make things red if they can potentially do well on social?

Editor 2: No – but there is not one nugget or anything.

Their interaction shows that all of the editors are struggling with balancing the tension between the new criteria for making a cover story subscriber only based on resources, expertise and exclusivity with the fact they believe the content to be important and should be widely distributed, one of the ways they enact their occupational identity. An additional point of discussion is if content is 'shared' on social media it may irritate readers to encounter a paywall when they attempt to read the story. Irritating readers is not the goal of an editorial team and does not help them meet either their subscription or readership goals. To state it another way, it appears that the traditional occupational beliefs and values are hindering the adoption of categorizing more content as subscriber-only as the act of limiting readers runs contrary to a core belief and one way that it is enacted. Furthermore, the number of readers for the top stories is omnipresent in the newsroom, reinforcing the importance of reach.

One of the editor's primary roles is to curate content, which includes an assessment and coordination of what, where and when content should be published. To do this, editors are balancing the tensions inherent in their occupational beliefs and values as outlined in Section 4.1. Depending on the context, editors may need to prioritize enacting one belief over another in order to get the job done. Part of this tension resolution is based on quality. Though quality assessments are continually made, evaluating content on whether or not it is 'good enough' to drive on-line subscriptions is an association not previously considered for featured content. The debate regarding this cover story continued past the meeting and Editor 2 agreed to make the article available to subscribers only. In the end, this article generated more subscriptions than any other previous single article. One editor commented to me, "Based on the success of this we paywalled our first story on [Event B]. It took some convincing by Editor A (same editor who initially resisted in the above interaction) who suggested it and Editor B eventually agreed." According to my observations and interviews these types of conversation do not happen prior to the shift so are notable for their absence.

Henry, an editor, explains how editors are becoming more comfortable with making more content subscriber-only by shifting their gatekeeping activities from focusing on serving the public interests to incorporating the emerging importance of converting readers to subscribers:

"We're putting more cover stories behind the wall now [we didn't used to]. Sometimes they don't work out as we realize the audience was too small and it didn't generate any subscriptions. These ones shouldn't be paywalled. That's okay. In general we know as we've seen it – people are willing to pay for specialized news. We know we have a loyal audience. The covers

[feature stories] we are still figuring out but we are slotting more behind the wall.”

The quote suggests one factor facilitating these decisions is the availability of feedback metrics on subscriber conversions. The number of readers at any given time is displayed prominently in the newsroom thus providing clear feedback metrics on reach.

Additionally, there is a daily email distributed to all editors highlighting other measurable data such as the number of subscription conversions including a list of key articles that triggered these conversions. Henry is referring to this metric in his quote above when he states that some ‘work’ and others do not. In spite of the fact this strategic initiative introduces a new tension into the activities of editors by forcing them to evaluate content not only on the foundational values but also on whether or not it will potentially generate subscriptions, the availability of feedback metrics to measure the outcomes of their decisions is facilitating this transition. Data is readily available on how many readers click on an article, the duration of engagement, and whether or not this was an article that triggered a subscription. The availability of data does not mean there is no debate, as most interactions in the newsroom require debate to resolve tensions (see Table 4-2 for a summary).

In addition to the availability of metrics, the meanings associated with content are also an important mechanism. The tension created by increasing reach versus subscription conversion also provides an opportunity for editors and reporters to clarify the meanings associated with the values of influence and quality. As Editor 3 points out in the above interaction, exclusivity and use of resources are ways to evaluate quality. Before this shift, these quality assessments were primarily used to determine location as the prior

quoted editorial interactions in Section 4.1 highlight. Additionally, meanings around influence are coming to the forefront:

“Feedback metrics are depressing. You would fool yourself into thinking that 200,000 people saw your story. Now I know, some stories it’s only 100. I like to think they are the most influential 100 and sometimes I’m not entirely wrong. People will talk to you who are people you use as sources, people who you consider experts in their field and have prominent positions and they’ll say ‘That was a really good piece. You got it right on.’ You realize it’s not the number but who. At least you are reaching the segment of the audience that is powerful and important and people you want to reach” (Deborah: Reporter).

These words reinforce what Samantha, a senior manager quoted earlier in this section, infers when she says, “subscribers are more meaningful.” Not only does Deborah explain how the meaning of influence is shifting in focus from reach to engaging a specific audience, she highlights how feedback from this audience reinforces this meaning. What is interesting is the shift in focus from the means (reaching a broad audience) to the ends (influencing) is more closely aligned with the meanings related to ‘high quality’ content on the left of Figure 4-2. In contrast, available metrics on readership reinforce the means of reaching a broad audience.

As Deborah’s comment indicates, metrics in the newsroom can be qualitative. Feedback from sources is an important motivator and as Jessica points out, “A lot of it [motivation] has to do with feedback in the world you’re covering. You can just tell if you’re mattering or not.” Reporters receiving feedback from sources on quality is one way of

reinforcing their belief that ‘we are the best’. Though this feedback is difficult to quantify, it does reinforce behaviors (Plowman et al., 2007; Weick, 1979).

The meaning of influence is not new for the editors and reporters at NatNews. As a quotation by Miranda in Section 4.1.2 highlights, influence also means policy change. The meaning and nuance of influence, however, becomes lost in the pre-paywall strategy as editors and reporters privilege reach when making decisions on the digital strategy. The focus on reach was being reinforced by visible feedback metrics:

“A huge measure of success is the number of clicks. That’s still important, it hasn’t faded but that used to be the most important thing. We have these screens in the newsroom that show what story has the most clicks for certain intervals – it’s always there” (Trevor: Reporter).

Another visible metric used to measure success, quality and ‘influence’ is industry awards. Focusing too much on these visible metrics can be a source of tension. Jessica states her frustration with using these metrics, “We chase awards and send emails about awards we won, it’s a stupid pat on the back. Not only is it arbitrary, but I’ve done stories that have a massive impact on my beat and my world. People [sources, experts] tell me that. But we send emails about awards and after awhile you think ‘was my story good enough?’” In other words, even metrics used to measure ‘influence’ may not be universally seen as the best way to measure success and quality.

In addition to raising additional tensions, categorizing content as subscriber-only impacts the conversations editors have during their daily meetings. Even sections responsible for creating *Analysis* content needed to adjust their conversations to accommodate for this

strategic initiative. A debate during an afternoon story meeting right before the launch of the app highlights this:

Martin: So I think this story is going to be big but do we make it red?

Henry: This may not be the weekend for red content.

Nate: So when do we know? We need to let the reporter know. It needs to be good enough.

Henry: Yeah, I hear that for launch they don't want to limit eyeballs.

Martin: So does that mean it's not red?

Warren: Make everything red – it's easier (said sarcastically). If it's good enough they'll read it.

Such conversations force editors to resolve the tension between having impact by reaching a large audience with a new overt consideration of driving subscriptions.

Furthermore, this decision has nothing to do with location or belief enactment, the typical focus of quality discussions. That being said, if something is categorized as subscriber-only it will typically appear in prominent areas on the homepage.

The shift in digital strategy resulting in the push for more content to be made subscriber-only forces editors to introduce new conversations into their daily story meetings as the first two examples in this section show. It also changes activities, as Nate points out in an interaction by stating, "So when do we know? We need to let the reporter know. It needs to be good enough." It means the editor may follow up more frequently with the reporter as content selected to go behind the paywall is already considered higher quality and has additional editing resources dedicated to it. "The editor and reporter don't know

always when they start writing that this is going to be a cover story. That only happens later, so the editor will often make more substantive structural edits to make sure the juicy bits are up front” (Peter: Editor). As the above examples highlight, considering whether or not a specific cover story is ‘good enough’ to generate subscriptions introduces new tensions and factors into the daily rhythms and conversations in the newsroom.

4.3.2 Focusing on unique content: Staff versus wire

Operating in a resource-constrained environment not only impacts ways NatNews is generating revenue, but also focuses attention on resource utilization. Differentiating their product by providing unique and high quality content is central to the goal of driving subscriptions. To meet this goal, there is a renewed focus on efficient and effective use of reporting resources:

“If editors and reporters are doing all of this [to enhance quality] then instead of letting other things slip they are likely just doing more. We are very good at adding things to what we do but very poor at taking things away. What you get is a bloated amount of activities which just leads to burnout” (Ron: Editor).

There are two alternative sources for editorial content: NatNews and external wire services. Staff reporters, freelancers and guest experts create content copyrighted by NatNews and wire services (such as Reuters, Bloomberg and Canadian Press) create externally copyrighted content. At risk of oversimplifying the process, NatNews uses wire content for breaking news, commoditized news (content that may not be breaking but is likely posted on other news sites) and for news outside their core coverage areas.

For example, NatNews may rely on wire services for immediate breaking news until they determine whether or not they are assigning internal resources to cover a story as the below brief interaction states. Determining what to cover and who should cover it is a key part of the gatekeeping role of editors:

Editor 1: I assume we're not staffing the [Event name]. Do we want to include it?

Editor 2: Yeah, there's a good wire – it will give us what we need.

In order to ensure NatNews coverage is differentiated and ultimately provides additional value to readers over the alternatives, content should be unique. To enact this in a resource-constrained environment, NatNews is enforcing a 'matching policy'. In other words, if the content is available on the wires, staff reporting resources are to be allocated elsewhere as the above excerpt between Editor 1 and 2 elucidates. There are two resource reasons driving the enforcement of this strategic initiative. First, as mentioned previously reporting resources are limited so NatNews simply does not have the resources to cover everything they once did, a reality exacerbated by the nature of the digital product:

“Sometimes these things are scheduled, so you have to get up at 7 o'clock in the morning for the [Event name]. And then you know you're talking to editors throughout the day as they, and that story goes through maybe a couple of iterations online. And at the end of the day, you're trying to come up with a new analytical take for the next day's paper. Well that process may be taking you 12 hours, and by the end of the 12 hours, you're burnt”
(Samantha: Senior Manager).

So relying on their limited reporting resources to meet the demands of the digital product can lead to burnout. Second, every article by NatNews copyrighted writers needs to be edited internally, putting resource pressures on the editing resources as well as reporting resources. “What people forget is everything must go through the desk. If we have all this copy, the desk gets swamped” (Ron: Editor). Wire service content is already edited thus economizing on writing and editing resources.

The implementation of this matching policy creates tensions in the newsroom with regards to how reporters enact their occupational identity, the editor’s gatekeeping function and the belief that ‘we are the best’. Reporting on beat related news is central to the identity of a reporter as it signals expertise and ownership of a beat both internally and externally. In a quick interaction between an editor and reporter, it becomes apparent as the editor reinforces the public ownership of the reporter’s area of expertise.

Reporter: I got my hands on a confidential report that says X.

Editor: Is it confirmed enough for a story?

Reporter: I’m not convinced yet but am worried about being scooped.

Editor: I’m not worried about that. Most others [media and industry experts] see what you’ve written and follow your lead. Confirm it first.

Reporters enact this by pitching ideas to write based on their expertise, sources and beat related events. Even if something is breaking news their strong sense of ownership provides incentive to cover a story. “I remember when [Company Name] announced they were [Event]. That was early. I wrote 3 lines then woke up the reporter. They want to be woken up. They own the file and don’t want someone else to cover it” (Miranda:

Editor). As discussed earlier, reporters rely on sources for feedback, thus one way to publically demonstrate ownership of a beat is to write a story and put their by-line (term for the reporter's name that appears at the top of an article) at the top to show readers who wrote the content, which is not only important for the reporter but for NatNews. Tiffany discusses the importance for NatNews, "We lost two really good reporters and these people have built up equity with readers. Suddenly someone comes in and they [readers] don't recognize the by-line – maybe the story wasn't the same quality, maybe it was." Hence, demonstrating beat ownership is a core part of a reporter's occupational identity but is also important for NatNews. Writing beat related content is also central in maintaining access to sources. Samuel explains, "Beat management is really important. Sources and experts are all over Twitter, so for me to be a presence there, to be, saying things on a daily basis, of news in [name of beat]. It can be a shortie but it needs to be there. That's important." As a result of these factors reporters and editors can be reluctant to enforce the matching policy. Martin, an editor states, "It's tough. I was talking to Jonathan and the [Name] report came out and we pulled a wire story. He felt his name should be on it. It's his beat and should be his by-line."

Matching also creates confusion among editors as it creates a tension between their gatekeeping role and managing resources effectively. The following conversation between editors right before a story meeting is telling:

Warren: I think the general rule of thumb is if it isn't a contender for the section front and not a strong beat story take a wire.

Nate: That will require more coordination with the [name of wire company]. The worst thing is when we do a match [because we're scooped] and then they release a match 30 minutes later.

Barbara: Yeah, but then change needs to come from the top. I guess if someone writes a match we can [show them] and they can push back.

Henry: Look, this isn't a hard science so it's tough to have rules like that. In the end it's a judgment call.

The editors are struggling with the ambiguity and fluidity of the situation so attempt to create a general guideline. The reality is, immediacy needs can impact assigning stories and as Henry points out, it is often a case-by-case judgment call. The challenge is what Nate points out what happens when they are scooped on a beat related story. Having to consider matching impacts their overall coverage strategy and how they enact their gatekeeping role. Not to mention the reporter who is scooped will likely want to write the story as the previous quotation by Samuel indicates.

Implementing the matching policy means limiting reporting on areas viewed as central to the occupational identity of reporters and editors. In spite of the challenges, the matching policy is being implemented. The flexibility in occupational identity enactment coupled with the same two mechanisms highlighted above, meaning and metrics, are having mixed effects while implementing this change.

Enforcing the matching policy creates tension for reporters who define themselves by demonstrating beat ownership and expertise, but also supports the belief of 'we are the best' as the below interaction highlights:

Editor 1: I know they've said to take wires but are others [other sections] really doing that? I'm not sure if wires give us what we want.

Editor 2: I looked at a few of them [unique identifier for each story] and each said 'Take most recent wire on [Event].'

Editor 1: Really??

The other challenge facing adoption is that reporters rely on sources for feedback metrics, making it difficult to potentially stop doing an activity that may sabotage their access to these sources. The above quote by Samuel highlights this tension as he states that sources are also watching his activity on Twitter thus there is pressure to weigh in on a topic. Feedback often happens without the knowledge of the editors:

"I get emails or the next time you have coffee with someone will say 'Hey, I read that story to you did it was really well done.' So you might mention that to your editor but it's a tough line because you don't want to be bragging. One of the big problems we have editors who don't get that feedback because they're not in touch with the beat" (Jessica: Reporter).

Ideally, the decision to assign internal resources comes down to whether or not the editorial team believes NatNews can create content that offers more value than what is available on the wires. The decision is subjective and depends on the availability of expert reporters, access to different sources and the type of analysis NatNews can provide. Furthermore, the quality of analysis is not known at the time of assigning as it depends not only on a reporter's skill but may rely on elements outside their control such as availability of sources. For instance, this excerpt is from a morning meeting where the subject of discussion is a local breaking story. NatNews does not specialize in local news but given the nature of the story, they decide to assign resources to cover parts of it:

Editor 1: We've got [Reporter Name] on the story in [place name]. We won't cover the bail hearing though – take wires on that.

Editor 2: The only thing I've heard is [Person Name] made a comment but we're debating whether or not to post.

Editor 1: Yeah, I heard we're not sure of the source. I wouldn't chase it.

One editor, Miranda, summarizes the challenge:

“I used to push back on matching. I mean what is the big deal? I get it now but good luck trying to convince a reporter. They don't care [about cost, time, resources] – it is their story to write. It's their beat. I was looking at it from their perspective before.”

In other words Miranda, who is a former reporter, switches from focusing on the important role beat coverage plays in a reporter enacting their occupational identity to one considering a broader perspective. Thus the presence of entrenched meanings on what a beat reporter does as part of their role and feedback metrics that are hidden from public view hinder the enforcement of this matching policy, as is the desire of editors to provide the best possible coverage.

Implementing this policy is not static as there is evidence that wires are being used more often, including on beats typically owned by NatNews. For example, in this quote I repeat from Section 4.2, Warren, an editor, states, “Today the fed report comes out but we've got no econ reporter available or anyone who is econ minded so we'll look for a wire.” In other words, Warren is prioritizing including coverage that is part of his coverage strategy as resources aren't available. Tammy, a reporter, reiterates this, “Look, sometimes I'm tied up in other things and if they [editors] want the story they're

just going to have to take wires or move onto something else.” The resource-constrained environment is often forcing the decision to use wires, but slowly the use of more wires is gaining acceptance. A slow change in the way reporters and editors are enacting ‘we are the best’ may be partially responsible for this acceptance. Early on in my observations, wire stories were not described favourably. The following excerpt is typical of the perceived quality of wire stories, “I’m looking for a wire as we should probably have this [story] but all of my options are crappy. I’m waiting for something half decent” (Mary: Editor). The below conversation is about four months later during the summer when resources are even more constrained than usual due to vacations:

Editor 1: I’ve been looking through the wires to fill in some gaps. There’s a really nice opinion piece on [Company Name]. What do you think?

Editor 2: Let’s use it – sounds good.

For editors, the priority is to ensure their coverage is complete. In the above case that also means addressing the fact there are ‘spaces to fill.’ An editor’s priority is also to ensure the content is of the highest quality possible. As Mary alludes to earlier, not all wire stories are substandard. In fact Mary also admits there is great variance among wire services, “If it’s important enough and we need to post it relatively quickly I’ll wait for a story from [Name of wire company]. Their quality [depth of analysis] is pretty good. The challenge is they don’t always cover what we need to cover.” Mary’s quote highlights tensions raised in Section 4.2 with regards to how speed to post is an important factor. Mary determines she has the time to wait for an article that closer aligns with internal quality standards and coverage priorities, important considerations highlighted in Figure 4-2. Given their occupational identity as conductors and coaches, editors are also

trying to actively manage and protect the use of precious reporter resources. As Table 4-1 shows, editors and reporters are fulfilling different roles in the newsroom. An editor is trying to assemble the best possible coverage whereas a reporter is trying to create the best possible content. If a reporter is associating quality with volume, however, this may result in an editor not achieving their task. Balancing this tension drives the below conversation on depth versus breadth of coverage:

Editor: [walking up to reporter's desk]. Busy morning?

Reporter: Yeah, it's earning season and I'm trying to keep up with the calls and writing stuff up for each.

Editor: What are the common threads?

Reporter: I'm working on that next.

Editor: Don't worry about individual stories – we'll take wires as it will be same old stuff all calls have. You've already started a wrap up between them – what do you think will tie them together? [discuss angles] I'll take a look at the wires. That's [what we've just discussed] much more interesting.

Reporter: Thanks – maybe I can actually eat lunch!

Ron, an editor, describes the necessity to continually reinforce this:

“Their argument is the wire stuff isn't up to the same standards as NatNews stuff but we've recruited [reporters] from wires. I keep saying – come on do a deep dive, that's how you'll have impact. Even better is put it behind the wall – make it subscriber-only. I'm not a big fan of limiting what they can write as they need creative freedom but they want their byline on it and it's tough to move away from.”

Though a key part of the occupational identity of reporters is demonstrating their expertise by publishing beat related content, their reason for doing so is partially driven by the desire to influence. These quotations highlight how editors are focusing on that aspect of a reporter's occupational identity to reinforcing the importance of analysis and depth of coverage for influence. The conversations do not remove the tension that reporters experience by not reporting on a story, but help to assuage it by bringing focus on other values important to them and associated with high quality content (see Figure 4-2).

There may also be an inconsistency between what a reporter may see as better than the alternative and the editor's impression. In her interview Deborah, a reporter, states, "If it's not a priority release or there's nothing exciting we can just take a wire on it and I can work on something else." In a separate conversation an editor specifically mentions the same reporter, "Even with Deborah, the numbers come out and she jumps on the story. We can take wires but I have to convince her to spend her time on the deep dive. She's fine with that but it takes reminding sometimes." In other words, what Deborah sees as a priority may not necessarily be the same as her editor. As a result of this variation in meaning, the tensions will likely not disappear.

Feedback metrics encouraging the adherence to the matching policy are subtler than the readily available subscription conversion information in the previous vignette (see Table 4-2 for a summary). Though the data to track what articles are read and how long readers spend on them is available, to pull this data for every article is difficult to do particularly given the time constraints editors and reporters operate under. "I know I have access to all of that but I get caught up in the day and then I forget how to log on to the system"

(Martin: Editor). Feedback from senior management can also be confusing, “I mean we are told to take wires and then sometimes our decision to take a wire is questioned. We put a wire on the front a couple of days ago though and there was no pushback” (Martin: Editor). There is evidence that reporters, editors and senior managers are struggling to reconcile their activities with ‘we are the best’. Even though it is an organizational level strategy, the editors implementing this suggest the feedback metric they receive (comments from their senior managers) is not always supportive. It highlights the struggle all occupational members are facing as the meaning of ‘we are the best’ is shifting to now include more non-staff stories. Unlike the first vignette where editors and reporters had immediate feedback metrics to rely on, reporters rely on traditional feedback metrics such as comments from sources and editors. The matching policy can be difficult to implement without metrics to counterbalance these traditional avenues for feedback metrics. “Feedback from your beat is massively, massively important. And just hearing from editors and stuff from managers goes a long way but we don't do it nearly enough around here it's always just like on to the next story on to the next thing” (Jessica: Reporter). As Jessica alludes, the context of always moving to the next story can prevent some of this coaching or feedback from happening. In other words, there are several metrics reporters and editors use, however, these are not only informal but are also not public.

4.3.3 Changing the editing relationships: Who versus what

My final vignette involves two major changes to the editing processes at NatNews. Due to declining revenues, NatNews is focusing on the core component of their

differentiation strategy, “Our true competitive advantage is the content and creation of content” (Ron: Editor). Focusing on content creation is reiterated in all of the executive interviews I conducted and a driving force in the decision by NatNews to outsource page layout and the final copy editing functions beginning approximately five years prior to the commencement of my study. The second change to editing came during my field observations when NatNews consolidated the in-house ‘first edit’ function to a centralized editing desk as part of launching their new app. When I began my study, section editors (the editorial role featured in the prior sections) conducted the ‘first edit’, though this did vary somewhat across sections. In a newsroom the ‘first edit’ is substantive and focuses on structure, style, clarity, logic and sourcing. In other words, the ‘first edit’ is essential to upholding many of the values of the editors and reporters from clarifying there is sufficient sourcing to ensuring readability meets quality standards. The copy edit is a line edit focused on grammar and punctuation as well as creating a headline to a story. Many years prior there was a ‘read back’ editor responsible for headlines but that was incorporated into the copy editor role several years before outsourcing.

The need to free up resources to invest in the creation of high quality and differentiated content was one of the driving forces behind the decision to outsource the work of copy and production editors to EditCo. At the time, NatNews was prioritizing investing in the digital product as opposed to some of the technical work required for assembling a newspaper:

“I think people start to accept that creating the content is the business we are in. We want our products to look nice and we spend a lot of time making

sure they are appealing and that they make sense to you and that the hierarchies and priorities are the same. But you can't do any of that unless you've got something to fill the agenda. That's where the priority is" (Jane: Senior Manager).

The remaining production editors at NatNews are the point of contact for EditCo and if necessary, the editors and reporters communicate with EditCo through them.

The second editing change was the consolidation of the 'first edit' from within each section to a central editing desk. The primary reason for this change was to ensure there were sufficient editors available to perform a 'first edit' at all times of the day.

Conducting the 'first edit' within the section could create scheduling issues if content was ready for an edit but no editor available. The staffing of a centralized 'first edit' desk could be adjusted, a change particularly important as it coincided with the launch of a new app at NatNews. At launch, the app had morning, noon and evening editions thus adding three more deadlines to the hard deadline for print, a change that differs from outsourcing in that the work stays within NatNews.

Both of these editing changes challenge how editors and reporters enact the belief that 'we are the best'. As Section 4.1 highlights, this is one of the core beliefs providing balance and allowing for the flexible enactment of activities by editors and reporters.

The discussion of this vignette departs from the previous two in that both editing changes were implemented, but these changes resulted in trading-off one belief for another as opposed to resolving tensions between beliefs. The consequence is a resigned acceptance of the decision whereas the other two vignettes show editors and reporters are proactively adopting the changes.

One key task of the copy editor is writing headlines. Reporters and editors may suggest an appropriate headline, however, traditionally this is a task of a copy editor “Headline writing is a craft. It’s a total skill. You need to be in tune with the paper’s voice and mission. In tune with the story. It is surprising how few people know how to write good headlines” (Henry: Editor). As Henry goes on to explain, headlines are a relatively minor yet important component of editorial content as they are the first words a consumer reads. “It is the first impression. It makes the reader want to keep reading. We take it really seriously.”

Even though the majority of headlines are outsourced, the headlines appearing on the section fronts and in key spots on the homepage are written at NatNews. Writing section front headlines involves whichever editors happen to be available. As the below interaction illustrates, editors take great care in crafting the headlines for the section front. As previous sections of this chapter have discussed, the front page contains the highest quality content. In order to enact their values of informing and influencing, content must be read. As one editor states, “A good headline makes you want to read it.”:

Editor 1: You working on the headline for [Story X].

Editor 2: Yeah, it’s brutal though – it’s up, it’s down, it’s hard to pull out a clear message. Maybe ‘Shifting tradewinds at X’.

Editor 1: I’ll see what I can do.

Editor 3: [Comes over and looks over Editor 2’s shoulder] Did you get my email with the headline for Story X and Story Y?

Editor 1: I'll open it now. [To Editor 2] – Hey what do you think of this for Story X that Editor 3 suggests?

Editor 2: [Looking at screen] Can we combine it like this? All editors agree and move on to the next headline.

A variation of this conversation takes place daily as section editors compose the headlines for their section fronts. Digital headline writing is also important:

“I had to change the way I think about digital headlines because you want people to click on it but not go so far. If you twist the headline a little bit to get someone to click on it then they'll read the story and understand that it's worthy of their time. You have to be careful not to go too far though as you don't want to break their trust” (Caleb: Editor).

These three examples raise the importance of balancing quality (succinctly capturing the essence of the content while remaining factually accurate) with the desire to have people read the content. Whether it is in the paper or digitally, the ‘craft’ is in balancing these tensions. As in other examples, the belief that ‘we are the best’ helps ensure the appropriate balance is struck.

Headlines are part of the overall content, thus outsourcing most of the headlines creates challenges for how editors and reporters are enacting the belief that ‘we are the best’:

“Headlines have been a major issue all along. There's been a tension ever since they were outsourced to EditCo. The reason is they are not great. What I mean is they don't regularly meet NatNews standards. These standards are in terms of capturing the essence. The NatNews standard is higher than average – not ‘good enough’ but better. In the beginning we were changing everything all headlines on the inside pages [because they were not meeting

standards]. It got to a point where management said, ‘Unless it is factually wrong, don’t change it.’ We were redoing the work” (Henry: Editor).

Section editors evaluate headlines based on whether the headlines meet an internal standard, “Yeah, EditCo was tough. I continued to change headlines on the inside pages for months until our hands were slapped. I get the argument of ‘why would we do work we pay others to do?’ I know it’s not the best use of my time” (Barbara: Editor). The tension these editors voice is one not only of quality but why quality matters (see the section labeled ‘purpose’ in Figure 4-2). A fundamental value is to inform the public and influence. Henry goes on to say, “Why take the extra time on the story [to make sure it is the best] if no one will read it because of the bad headline?” In other words, editors believe that unless a headline meets a certain quality standard then there is the potential that content will not be read, thus limiting their ability to enact their values on informing and influencing the public. Ironically, redoing the work did not always enhance the quality, “The main issue they have is it hurts the quality of NatNews but by redoing the work we were creating errors. It’s impossible to redo the work in such a short time and get it right” (Production Editor).

As discussed in earlier vignettes, feedback metrics are a key mechanism involved in activity adaptation. Feedback on headlines, however, is difficult to gather and is subjective. As Henry alluded to, factual accuracy is a key component but measuring ‘essence’ is more difficult. Even though a senior manager states in an email that, “To my knowledge there have been no complaints to subscription services from readers [about headlines],” one could argue that complaining about a headline is different than not reading an article because of a specific headline. As Henry points out, “Maybe the joke

is on us. I mean maybe the reader doesn't notice and we are making a big deal about something only we saw.”

Even though EditCo is a separate organization, as one senior manager points out, many there are former NatNews employees. “What I still don't understand is these are ex-NatNews employees, they know us, they know our standards yet people still don't accept it. People just can't believe we would outsource a part of NatNews” (Jane: Senior Manager). I titled this section ‘who versus what’ to highlight the importance NatNews editors are placing not necessarily on the activities themselves but on who is performing these activities. Though editors generally accept the outsourcing of copy editing functions outside of headline writing, reporters lament how the copy edit impacts their work:

“The notion, as a writer, I find it deeply offensive the notion that I am edited by people I can't really speak to. It creates a situation where it's easier not to ask. I mean there is no direct line to the writer, if they have a question they have to take it to someone, who. It just discourages questioning. The other day I had an article where the copy editor changed a word and 10 years ago we would have had a debate about it. Now they just change it. I get the business reasons but you're just going to lower the quality” (Keegan: Reporter).

Keegan's quote highlights the ever-present tension of immediacy but also the impact that ‘who is doing the work’ is putting on quality. Arguably, these ex-employees have all the skills and expertise necessary to perform the work, however, the anonymity of who specifically is performing the task creates challenges. Outsourcing also changes

relational dynamics. Examining the reaction to the centralization of the ‘first edit’ function reveals more nuances to this reaction.

The ‘first edit’ includes evaluating structure, clarity, sourcing, logic and style. The reality of moving the ‘first edit’ functions out of the sections and into a central desk challenges the traditional reliance on subject matter or ‘beat’ expertise at NatNews to uphold quality standards. “This edit [‘first edit’] is substantive and focuses on key components of the content like – where is your nutgraf? [addresses the who, what, where and why of story and is typically at the beginning of a story]. Don’t get me wrong, copy editing is important but the most important edit is the first one. You need to be engaged with the story, topic and fine details” (Warren: Editor). In other words, Warren states that a certain level of expertise and involvement is necessary to edit appropriately.

Centralization changes the tension resolution involved in enacting the ‘first edit’. As the above quote shows, the most important thing is expertise, a key component of the gatekeeping function of editors and reporters. “Before the change my copy would always go first to my immediate editor as she knows the story and we’d work on it together” (Samuel: Reporter). The centralized desk, however, was created to efficiently use editing resources thus tensions are resolved differently:

“When assigning stories [to editors on central desk] the most important thing is deadline, then who is in, have they worked on the story before and of course their specialization. It is central but everyone has their specialty and some like to expand beyond it and others don’t. There are just things that people are comfortable with” (Production Editor).

The change does not necessarily mean those conducting the ‘first edit’ are comfortable with this. “I know plenty of them as they are long time employees. They will complain to me that they’re spending their morning editing business copy. It’s like they [management] no longer values the skills and expertise of the editors doing this work” (Keegan: Reporter).³ Those working on the centralized desk echoed this sentiment. As one comments, “The only reason they have a coordinator for the desk is everyone has their specialty. People would just edit what they know so instead it has to be assigned.”

Resolving tensions and the order of priorities is different then how it would be handled in a section. Keegan, a reporter, explains the difference between the previous ‘first edit’ and the edit at the centralized desk:

“An editor doing a ‘first edit’ used to go through something, and they’d never be catching style mistakes or typos, or anything like that. They’d be, be saying, like big stuff, like take this thing and put it up at the top. I remember during a [name of political event], you’d have an editor taking in three reporters copy and patching it together. That type of major edit. What our central ‘first edit’ desk is doing is essentially a copy edit but we can’t say that. They’re asked to edit outside their specialization and that’s not good for morale or quality.”

Other reporters and editors echo this concern.

“I don’t think I’ve had one structure edit yet [conversation is 6 months after the change]. It’s more like a line edit and they’re good at that. But now my

³ Due to the limited number of ‘first edit’ editors in my sample and the general awareness of who they are [I sat in a public location for a short period only], I prefer not to use their quotations to protect their anonymity. I use quotes from others that are representative of my discussions with those on the centralized desk.

direct editor is barely reading my stories anymore as they are going right to the central desk. Luckily I've been here long enough I know how to write but I want my stories to be made better. Now they're cleaned up and moved along. We used to have this thing for section front stories that you had to put an authoritative stamp. I can't think of the word but it had to be a 'NatNews Story'. That stamp is often left to the reporter and I think that's making us lose our edge a bit" (Jessica: Reporter).

Henry, as an editor shares this concern, "I mean we're putting stuff out with 50 word ledes (introduction), 40 is the outer limit and ideally it should be 30. I mean 50 is just way too long. In truth I think stories are just being edited less. On the plus side we have an earlier deadline and we make it all the time. So mission accomplished right?" These comments summarize how the balancing of tensions is shifting as a result of resource constraints. It also illustrates how the immediacy belief is in direct tension with how editors and reporters would ideally like to enact 'we are the best', the belief underpinning their commitment to quality.

The final quote by Henry also highlights tensions in feedback metrics. On one hand he discusses the length of the lede as an indication of writing quality. On the other hand he points out that earlier deadlines are consistently being met. Missing deadlines carries financial penalties as printing is outsourced. During my observation period I witnessed several close calls and a few missed deadlines but as Henry points out, this trend has stopped. An editor comments to me, "You've missed an exciting two weeks. They've moved the deadline up and we haven't missed it yet!" Missed deadlines are straightforward to track, but 'essence' and writing quality are less tangible. In this same conversation another editor comments, "We've stopped a lot of the 'first edit' but for

features we're still doing the heavy lifting but sometimes I can't. We're doing a lot for web too. I know it should go to the desk first but it takes too long to turn around."

Another editor chimes in, "We are only 50% of the way there with this desk. They need 30 more staff to run it the way it needs to. Half the time it doesn't go to our guys so it's just a copy edit. Not sure where the value is in that." Changes to editing are being implemented, but the implementation of it causes both editors and reporters to question what it means to 'be the best'. As Henry states, "Yes, there is an element of control but not for control's sake. Those who rise in the food chain do so because they are capable. Ensuring the quality of the section and content is our job and this just doesn't let us do it."

4.3.4 Summary of vignettes

The flexibility in enacting the beliefs and values comprising occupational identity both enable and inhibit strategic renewal. I isolate two mechanisms, meanings and metrics that underpin this relationship. The presence of feedback metrics and the meanings associated with the beliefs and values are mechanisms creating a mixed effect as editors and reporters enact their occupational identity during strategic renewal.

The above vignettes explore three different strategic initiatives being implemented as part of strategic renewal at NatNews. Each of these vignettes highlights the important role that balancing tensions between beliefs and values play in the newsroom. The order I present them is deliberate as in the first vignette both mechanisms of meaning and metrics provide what is needed to adapt activities. Though the hindering effect of occupational identity exists, occupational identity is also helping the adaptation of

activities necessary to implement this strategic initiative. Similarly, the second vignette highlights how strategic initiatives can create tensions between not only how beliefs are enacted but how tensions between the roles in the newsroom work to help resolve these tensions. My final example highlights the central role that enacting beliefs has to occupational members. It also provides an example of how changes to enactment impact the meanings associated with beliefs. Examining how the reporters and editors are going about their daily work creates a more nuanced understanding of why these roles may be resisting. There are concerns about autonomy, but the more substantial concern rests with how the changes are impacting quality.

It is easy to overlook the potentially generative aspects of occupational identity as most research in this field focuses on how members of occupations resist change. My findings from this section are summarized in Figure 4-3 and Table 4-2 below. I discuss how these findings contribute to the literature on both strategic renewal and occupational identity in the next chapter (Chapter 5).

Figure 4-3 Linking strategic renewal and occupational identity: Meaning and metrics

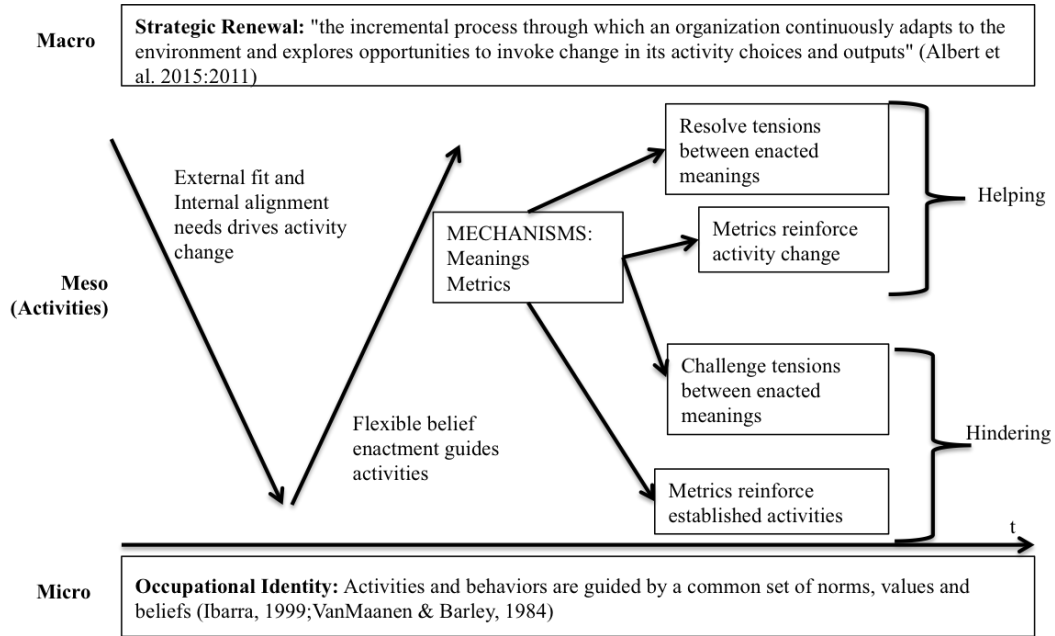


Table 4-2 Summary of meaning and metric mechanisms

Strategic Initiative	Meaning Shift (see Figure 4.2 for details on meaning)	Metric (see Appendix L for examples)	Reinforce Established/ New Activities	Visibility
Increase Subscriber Only	Quality (Influence): Shift in focus from overall number of readers to target readers	Quantitative: subscription conversions, # of readers Qualitative: quality and influence	Quantitative: Est: # of readers New: subscription conversion Qualitative: Est: feedback from sources and outside experts on quality; feedback from internal sources (editors, senior managers) on quality	Quantitative: Wide access and visibility to metrics Qualitative: Limited access to metrics (reporter – source; reporter – editor; editor-editor)

Implement Matching Policy	<p>Quality (Expert): Shift from internal expert to accepting external</p> <p>Shift in beat ownership from broad to deep</p>	<p>Quantitative: # of readers, # of by-lines</p> <p>Qualitative: quality and beat ownership</p>	<p>Quantitative: New: reader engagement</p> <p>Qualitative: Est: belief in 'we are the best' makes it difficult to accept external as equal Est: feedback from sources</p> <p>New: focus on deep versus broad coverage</p>	<p>Quantitative: Available but not easily accessible nor highly visible</p> <p>Qualitative: Limited access and highly subjective</p>
Change to Editing	<p>Quality (Expert): Shift from specialist to generalist</p> <p>Quality (Polish): Shift from perfect to sufficient</p>	<p>Quantitative: # of errors, compare with style guidelines</p> <p>Qualitative: quality of prose/structure</p>	<p>Quantitative: Est: # of errors New: adhering to deadlines</p> <p>Qualitative: Est: writing style, structure, craft, capturing the 'essence' in headlines</p>	<p>Quantitative: Errors are public Adhering to deadlines is widely accessible and visible</p> <p>Qualitative: Public insofar as the content is widely accessible and visible Evaluation is highly subjective</p>

Chapter 5

5 Discussion

Chapter 4 reveals three key findings, which I discuss in detail below. First, I outline my findings related to occupational identity and clarify how these findings resolve some disparate findings. Second, I discuss my overall findings in detail and draw on research on the meaning of work and feedback to support these findings. Lastly, I discuss how my findings contribute to our overall understanding of strategic renewal.

5.1 Findings related to occupational identity

As opposed to being rigid, my analysis shows the enactment of beliefs and values forming the foundation of occupational identity is flexible. As editors and reporters enact their occupational identities, they embrace this flexibility and reconcile tensions between the ideals and the immediate contextual conditions. In other words, flexible enactment and tension resolution is central to the everyday work of these occupational members.

Beliefs, values and work help define ‘who we are as members of an occupation’ (Barley, 1989; Nelsen & Irwin, 2013). These beliefs and values are central to understanding occupational identity as they drive activity enactment and the foundation for what members of an occupation do (Bartunek, 1984; Dutton & Dukerich, 1991; Trice & Beyer, 1993; Van Maanen & Barley, 1984). The work of occupational members is particularly important for research in occupational identity as activities and tasks form

the foundation for membership (Ashcraft, 2007; Nelson & Irwin, 2014; Pratt et al., 2006). As my adoption of the definition by Ibarra (1999) suggests, members of an occupation share beliefs, values and norms. For instance, in their study on occupational identity formation Pratt et al. (2006) state, “Research suggests that all doctors who have completed medical school have some values and beliefs in common as a result” (p. 238). Social identity theory forms the foundation of this research and focuses on the importance or commonality of these beliefs as binding members to each other (Tajfel, 1982; Tajfel & Turner, 1986). Furthermore, adherence to these beliefs guides behavior and is essential for membership (Ashforth & Mael, 1989). Focusing on commonality leaves little room for exploring how equivocality in enactment impacts our understanding of beliefs and values as a foundation for occupational identity. Prior research does not explore or discuss the significance of variation in the enactment of the beliefs and values forming the foundation of occupational identity. Furthermore, I find that occupational identity enactment is flexible and that differences occur within the same member while engaging in similar activities. One reason for this equivocality is the contextual conditions impacting the daily work of reporters and editors is dynamic; activity enactment depends on these conditions.

The foundations of occupational identity highlight the importance of shared beliefs as a necessary condition for membership. Focusing on commonality between beliefs may explain why earlier studies do not emphasize tensions between beliefs or describe them as sources of conflict to be resolved. In their study of work cultures, Trice and Beyer (1993) propose that multiple and conflicting ideologies exist within work cultures. The authors state the existence of multiple ideologies lead to adaptability as members can

invoke different beliefs depending on the perceived threat of a situation. “If a company decides to begin involuntary drug testing, those who favour this practice will evoke ideologies about safety and performance; those who oppose it will evoke ideologies of mutual trust and rights to privacy” (p. 37). Even in this explanation, contradictory beliefs are not conceptualized as simultaneously held and reconciled; a marked contrast to my analysis.

My findings are aligned with other studies in journalism. In his study of the ideology and occupational identity of journalism Deuze (2005) states, “These values – as I will show hereafter – are sometimes inevitably inconsistent or contradictory. To journalists this generally does not seem to be a problem, as they integrate such values into their debates and evaluations of the character and quality of journalism” (p. 447). In other words, occupational insiders view conflict and tension as a generative in evaluating ‘quality’.

Another reason the flexibility I observe is not often discussed outside of journalism research is occupational identity research focuses on activities. Ashcraft (2013) states:

“We thus make profound miscalculations that the nature of work can speak for itself, that ‘what we do’ is an obvious activity rather than a contested site of social construction, and that the burning occupational identity question is how individuals *relate to* what they do, not how the *very nature* of what they do is also constructed” (p.11:italics in original).

My analysis provides evidence that ‘what they do’ is constructed partially by reconciling contradictory espoused beliefs. It is impossible to isolate the reason why this finding is understudied but the reality that studies may focus more on work and activities than

variety in the enactment of underlying beliefs is a potential reason my finding remained underexplored.

The finding that shared beliefs and values are enacted in multiple ways is aligned with the concept of ‘strategies of action’ introduced by Swidler (1986). Though Swidler is discussing the role of culture, not identity, she argues that values are insufficient for explaining behavior as context shifts and evolves making rigid adherence to values an impossible task. Instead, beliefs and values are only part of a ‘toolkit’ members draw on while going about their daily lives using appropriate ‘strategies of action’.

Conceptualizing occupational identity as ‘strategies of action’ helps explain how beliefs and values at NatNews can be shared as part of their occupational identity, yet also enacted in various ways as contextual conditions shift. Put another way, ‘we report without fear or favour’ is not a rigid belief demanding compliance to a specific definition, but an ideal that helps set limits on the boundaries of acceptable and unacceptable behaviors. For example, an earlier quoted conversation between Benjamin and Martin discussing the inclusion of the mention of a corporate award in an article in order to secure access to a coveted source appears to compromise a core belief. Under a general ‘strategy of action’ for securing access to sources while using beliefs as a guide, however, this is within acceptable boundaries. Distinguishing between adherence to beliefs versus ‘strategies of action’ is important for our understanding of how occupational identity is enacted as it infers there may be a range of acceptable behaviors for given beliefs and values and the identity statements arising from them. The reporter who considers himself a ‘tenacious seeker of truth’ (one of the responses to ‘who are we as reporters’ outlined in Table 4-1) can include some ‘PR like’ content regarding an

award and still uphold 'who he is' as a reporter. The challenge, of course, is these guidelines and boundaries are implicit and may not be completely shared, even if the belief is shared. The word of caution that Martin, the editor, voices is an example of making the implicit boundaries explicit. The results of my analysis suggest that research on identity should put equal emphasis on understanding the beliefs driving activities as the activities themselves.

At NatNews, beliefs exist in tension with other beliefs. As opposed to being a source of conflict, this tension ensures that boundaries on the 'strategies of actions' occupational members undertake are not crossed. Researchers studying occupations are interested in the socialization role of common beliefs with a focus on the conformity of members to those beliefs reinforcing their membership and identity with the occupation (Anteby et al., 2016; Van Maanen & Schein, 1979). A notable exception is the work of Gary Fine who has several papers based on his ethnographic work on restaurant cooks. Fine (1996) challenges the notion that an occupation has a single identity and explores this assumption by examining competing occupational rhetorics or identities among the cooks. Depending on the situation encountered, the cooks in his study use rhetorics of professionalism, business, art and labor to describe themselves and the work they do. His theoretical positioning resonates, "Workers may be task specialists but when embedded in organizations their task is to do whatever is necessary within their ability to achieve the ends of the organization" (1996, p. 92-93). Our studies depart at this point as he argues that tasks are socially situated in organizations and are thus constrained, giving rise to multiple occupational rhetorics or identities in order to get the job done. I do not find evidence that editors and reporters have multiple identities. I do, however, find that

conflicting beliefs create tensions to be resolved in their daily work. The results of my dissertation build on Fine's work by providing an empirical example of the role competing beliefs play in the everyday activities of members of an occupation. Similar to Fine's conclusions on rhetorics, these beliefs conflict, but that inconsistency can be generative as members rely on them to deal with the changing contextual conditions within which they operate.

Focusing on the overall social identity as opposed to beliefs leads researchers to conclude that substantive change is next to impossible without some change to the social identity (Bartunek, 1984; Nag et al., 2007). This may be true for organizations as 'what we do as an organization' is central to organizational identity. "Organizational identity frames, or creates meanings for, the knowledge-use practices of organization members" (Nag et al., 2007, p. 840). In other words, similar to occupational identity, activities and practices are central to organizational identity. Thus it is instructive to examine the relationship between strategic renewal and organizational identity recognizing there are limitations to this comparison.

There are conflicting conclusions in studies examining the relationship between strategic renewal and organizational identity. On one hand, Nag et al. (2007) posit any major transformation effort must be accompanied by an identity change as organizational identity is embedded in the way an organization uses its knowledge. Organizations are not necessarily changing the response to 'who are we' as an organization, but the meaning associated with this statement might change (Gioia, Schultz, & Corley, 2000). In the study by Nag et al., organizational identity is a source of resistance. On the other hand, work by Dutton and Dukerich (1991) and Plowman et al. (2007) both describe

transformational organizational change but do not posit that organizational identity change is an antecedent to this change. For example, Plowman et al. (2007) examine how offering breakfast to homeless people, a small, micro change in activities, radically transforms a church. The authors describe the motivation for the decision to offer breakfast as similar to a later grant application, “At Corazón Ministries in Mission Church we believe we are all alike, rich or poor, there is no distinction” (2007, p. 533). Though the researchers explain that the church was experiencing an identity crisis of ‘who are we as an organization’, the breakfast decision appears to be aligned with the underlying values and beliefs of the church. One could argue they had never enacted this value by offering breakfast to the homeless before. The meaning of their belief is relatively stable but how they enact it changes. Dutton and Dukerich (1991) also argue the belief that the New York Port Authority is an ethical organization is a key factor in facilitating how the organization handled the increase in the number of homeless people in their facilities and subsequent transformation of the organization. Similarly, the meaning associated with ‘ethical’ is stable but how they act on meaning changes. In these studies, the beliefs supporting organizational identity are stable but are a source of adaptation.

Part of this apparent inconsistency of findings may stem from the focus of analysis. Including an analysis of foundational beliefs and values supporting a social identity may be one way to reconcile these seemingly contradictory findings. At NatNews, centering on the enactment of identity statements such as ‘we are tenacious seekers of truth’ and ‘we are experts’ (cf. Table 4-1) masks the foundational role conflicting beliefs play in setting boundaries for ‘strategies of action’ by editors and reporters. It also fails to

explain why conversations like the one between Benjamin and Martin take place. In fact, if we consider Martin's occupational identity as 'conductor' and 'driver of the news agenda', it is not clear what the significance of the conversation is or why it occurs. I am aware that the studies in the prior paragraph yield an inconsistency in findings on organizational identity, but given beliefs and values are important for both occupational and organizational identity, this may be one way to reconcile these results.

My findings that re-focus our attention away from the existence of shared identities in terms of 'who we are' and 'what we believe' to the enactment of beliefs and values as 'strategies of action' is an important step in linking occupational identity with key organizational processes. Furthermore, I posit that inconsistencies between beliefs create tensions and resolving these tensions is helpful to create boundaries on the 'appropriateness of action' (Weick, 1988). My analysis shifts the concentration from viewing occupational identity primarily as an entity or cognitive schema to one of action. Refocusing our attention on action, specifically tension resolution between beliefs, helps shift the conversation from 'who we are' and 'what we do' to the 'acting' resulting from holding these beliefs. Occupational identity is positioned not as an entity or something that members of occupations share and have but something occupational members are continuously 'doing'. The analogy to grammar that Weick (1979) uses to describe organizing is a useful place to start. Grammar, however, infers strict rules. I prefer to think of occupational identity as providing an outline similar to what I use to write this dissertation; creating a 'toolkit' but leaving room for variation. It also influences 'strategies of action', as similar to occupation beliefs an outline imposes boundaries and shapes my thinking and writing. Such an approach provides a more useful foundation for

beginning to understand how occupational identity relates to strategic renewal and I discuss the important implications in the following sections.

My finding, that conflict between beliefs can be generative, is echoed in recent developments in the literature on paradox. A paradox is defined as, "contradictory yet interrelated elements that exist simultaneously and persist over time" (Smith & Lewis 2011, p. 386). Paradoxes can be categorized according to the types of tensions invoked. For example, Smith and Lewis (2011) identify four key paradoxes as they relate to tension resolution: belonging, learning, organizing and performing. Each of these paradoxes can also co-exist, such as the paradox between belonging and performing, which is the closest example to my data dealing with clashes or tensions arising from identity and work. For example, Kreiner, et al. (2006) Kreiner, Hollensbe, et al. (2006) outline a process of identity work as Episcopalian priests struggle to balance their personal identity with that of being a priest. The identities co-exist, and these authors outline how balance is achieved through actions that both differentiate and integrate the identities together. Though this example comes closest to my finding, it differs in that the paradox exists between identities, not within as it does in the case of multiple and conflicting beliefs. My findings also differ in terms of focus as the traditional view of paradox in organizational studies examines dualities between constructs such as exploration and exploitation apparent in studies on organizational ambidexterity (Smith & Tushman, 2005), low cost and differentiation (Heracleous & Wirtz, 2014) or between competing logics (Battliana & Dorado, 2010; Smets, Jarzabkowski, Burke, & Spee, 2015). Consequently, my finding opens up the doors to examining a 'paradox within a paradox'

and the possibility that even within the paradox of belonging, tensions exist and are being resolved.

5.2 Linking occupational identity and strategic renewal through meaning and metrics

As my literature review in Chapter 2 suggests, I expect the relationship between occupational identity and strategic renewal to be one of resistance and inertia.

Additionally, journalism research supports the dominance of resistance arguments (Ekdale, Singer, Tully, & Harmsen, 2015; Gade & Perry, 2003). Based on his research in several American newsrooms, Ryfe (2009, 2012) provides compelling evidence that journalistic practices fulfill important symbolic and functional needs for those enacting them. Ryfe shows how attempts at changing the newsgathering practices of beat reporters fails because of entrenched habits that are a key part of their occupational identity. In a more macro-study of organizational level change, Gilbert (2005) compares multiple newspapers at the advent of the rise of digital media, and compares the threat response to resources versus routines in order to understand the cause of inertia. Gilbert concludes that even when organizations react by investing resources in new areas, routine rigidity can cause inertia. One reason for this difficulty is that the underlying logics and patterns of activities are resistant to change.

In contrast, Boczkowski (2004) provides a much more hopeful future for innovation in journalism. He presents evidence that innovation and change do happen with digital products in newsrooms with print traditions (this summarizes the situation facing NatNews). His examination of newsroom innovations compares experimentations

occurring outside of the core digital products and finds outcomes are closely tied to established newsroom practices, structures and audience. My findings complement those of Boczkowski (2004) who studies types of innovations and how they are happening. His focus is on studying the innovations themselves, whereas mine is on linking a key component of journalism, occupational identity, to a general process of strategic renewal.

Most work that considers bureaucratic changes within organizations inhabited by occupations focuses on the difficulty of doing so. For example, in her examination of the adoption of business planning procedures in museums, Townley (2002) isolates different dimensions of rationality to determine which dimensions lead to either acceptance or resistance to this change. Townley finds that even if museum professionals support the general or theoretical idea of accountability driving the adoption of business planning, professionals still resist the change. Once changes move from theoretical to practical, museum professionals resist the change as they cannot reconcile them with their 'value spheres' or sets of activity governed by values and norms. One of the greatest sources of resistance is that changes to the way professionals measure consequences (museum visits, satisfaction levels) could put pressure on the way museum professionals enact their professional identity of 'preservers and interpreters of heritage.' Measurement is a key component of business planning procedures, however, creating alternatives that are measurable, meaningful and transparent for museum professionals is difficult. Furthermore, adopting the 'wrong' measures could negatively impact the activities of professionals and alter important elements such as occupational identity. Townley uses an institutional lens thus her terms and concepts differ from mine, but the importance of meanings and metrics emerge as themes in her work. For example, though she labels

these moral questions, her study contains the following quote indicating it is not necessarily the change but how that change impacts meaning:

“There is certainly a concern internally about maintaining historic integrity. I mean we are a mission driven organization but we are now having to [be] market-driven. If there is a continuum . . . if there is mission and market , , , people would prefer us closer to mission. We are concerned about historical integrity and the validity of the message, I mean, how far do you go before you start threatening the message? (Division manager, 1996)” (2002, p. 174).

Similarly, metrics also play a role as museum professionals are concerned that adopting the more market-based metrics may impact how they enact key parts of their value-sphere. Given her context, it is not surprising that metrics are central but the concerns echoed by her museum professionals are also in my data. I repeat an earlier quote from Henry as he discusses the outcome of editing changes, “On the plus side we have an earlier deadline and we make it all the time. So mission accomplished right?” My findings build on Townley’s work by isolating meaning and metrics as key mechanisms linking occupational identity and strategic renewal that lead both to inertial and adaptive behaviour. I also provide evidence that the fears of the museum professionals may be becoming a reality at NatNews. By analyzing multiple initiatives I find occupational identity both helps and hinders strategic renewal, a finding less explored in the current literature.

5.2.1 Meaning

The mechanisms of meaning and metrics are central for providing the information necessary for editors and reporters to continue with their daily work. Though my literature review does not include sensemaking research, my findings reveal close ties between what I observe and sensemaking. These scholars focus on understanding how

cognitive resources such as ‘shared meanings’ are a source of adaptive behavior during periods of strategic renewal (Gioia & Chittipeddi, 1991; Maitlis & Sonenshein, 2010). Their research is motivated by trying to understand how shared meaning is constructed with a focus on ‘what’ (event, crisis, strategic change) is being made sense of (Maitlis & Sonenshein, 2010; Weick, 1995). In other words, sensemaking research focuses on the relationship organizational members have with the object or subject of the sensemaking activity in order to understand the meaning itself. The identity of those involved is seen as a key source of shared meaning (Gioia et al., 2000; Reger, Gustafson, Demarie, & Mullane, 1994; Weick, 1995). My analysis does not explore how meaning is made of specific strategic initiatives retroactively, but how occupational members are going about their daily work during periods of strategic renewal. There is natural overlap as the resolution of tensions that I observe is facilitated by the sensemaking efforts of editors and reporters leading to my identification of meaning as a key mechanism. What is interesting is not that meaning is made or even that meaning may change over time, but how strategic renewal shifts the balance in how tensions between beliefs and meanings are reconciled. Isolating the link between meanings and action is based on my move away from conceptualizing occupational identity as an entity or ‘interpretive schema’ that members rely on for interpretation. Instead, I find that engaging in activities under contextual constraints privileges certain enactments of beliefs and meanings over others. For example, my first vignette illustrates how the meaning occupational members associate with ‘influence’ refocuses from influencing through reach to influencing through deep engagement with content. As opposed to portraying this as a retrospective rationalization of behaviors, I suggest tapping into their ‘toolkit’ of ‘strategies of action’

while enacting their gatekeeping belief helps editors and reporters shift their activities to support strategic renewal. My finding also differs from sensemaking studies in organizational identity as this associated meaning of ‘influence’ is contained within the occupational members ‘strategies of action’. I do not suggest that meanings are not changing, but that enacting these beliefs changes which in turn may shift or privilege some meanings over others. Once included in the repertoire, these ways of acting become part of the ‘toolkit’ of occupational members. Thus the presence of shared meanings is less important in my study than acting. The wide variety in how beliefs are enacted as ‘strategies of action’ can help the process of strategic renewal.

My findings also provide further evidence that even when activities remain the same, meanings associated with those activities can change. In her study of institutional change at an Israeli Rape Crisis Center, Zilber (2002) shows that the organizational identity of the center changed over time as it began to rely on professionals with a therapeutic background for more of their staffing needs. Though these new members engaged in the same feminist oriented activities established by the founders of the Center, the meanings became more associated with the emerging therapeutic paradigm. Zilber (2002) ends her work with a cautionary tale of how infusing traditional activities with new meaning can lead to institutional instability. My analysis provides empirical evidence supporting this conclusion. Our approaches differ as Zilber (2002) examines institutions, which she defines as, “Procedures, practices, and their accompanied shared meanings enacted and perceived by members of an organization.” Theoretical difference aside, my findings reveal that occupational identity hinders the process of strategic renewal when the enactment of a belief calls into question the validity of the meanings associated with that

belief. For example, strategic renewal is triggering activity change that compromises the ‘strategies of action’ associated with ‘we are the best’. As these activities change, the meanings associated with ‘we are the best’ also change as both reporters and editors point out shifts in the meaning of ‘quality’. In other words, ‘we are the best’ is no longer associated with error-free, deeply edited content or meanings associated with ‘high quality’ content in Figure 4-2. Shifting meanings does not mean the belief of ‘we are the best’ disappears, as during my study it was actively being enacted. The activity change resulting from strategic renewal, however, challenges meanings leading to my observation that meaning is a mechanism through which occupational identity can hinder strategic renewal.

The role of meaning also features prominently in research on the meaning of work (Rosso, Dekas, & Wrzesniewski, 2010; Wrzesniewski & Dutton, 2001; Wrzesniewski, LoBuglio, Dutton, & Berg, 2013). Though conceptualized at the individual level, this literature provides some theoretical arguments applicable to my findings. Researchers define the ‘meaning of work’ both as an interpretation of what the work signifies as well as to how significant the work is to the person performing it (Rosso et al., 2010). The meaning of work has been linked to several outcomes such as commitment, job satisfaction, etc. (see Rosso et al., 2010 for a complete overview). The work context, self and others are all key factors influencing the meaning of work. In their related conceptual work on job crafting, the process by which individuals change components of their job to meet specific needs regarding meaning at work, Wrzesniewski and Dutton (2001) propose a relationship between the tasks performed, social environment within which these are performed and the meaning of the work. Though their purpose varies

substantially from my work, these authors posit that the meaning of work is altered when an individual changes their activities, their social interactions or both. In other words, activities and social interactions are central to the creation of meaning at work.

The theoretical approach used by Wrzesniewski and Dutton help to explain one of the key nuances behind my findings: who is doing the acting is as important as the activity itself. In particular vignette three, changes to editing, impacts both activities and the social interactions of those activities. In the case of outsourcing editing, the social interactions shift from in-house editors performing the work to ‘anonymous’ outsiders. Changes to editing do not substantially impact the activities of in-house editors, as copyediting was not part of their role (at least the assigning editors featured in this study). Outsourcing editing did, however, dramatically impact the social interactions at work. For example, editors could no longer walk over and discuss copy edit or headline decisions as these communications with EditCo are centralized at NatNews. Changing the editors and reporters’ interactions as well as the nature of the interactions shifts the meaning of the work. The change to social interactions leads to statements such as one made by Henry, “We’ve never met any of them. I mean sometimes I got an email and see a name but I don’t know who this person is. It’s pretty hard to build a rapport with someone you’ve never met.” Henry’s statement suggests that it is not only the activity but social interactions that are important in maintaining meanings of work. Though this definition of the meaning of work is specific about what work signifies to an individual, my findings suggest there is potential to expand this model beyond its current focus on the individual. Conceptually, all three of these factors are related to my work and provide further theoretical validation for my findings.

5.2.2 Metrics

Metrics are also a key mechanism linking occupational identity to strategic renewal. For example, the existence of metrics in the form of number of readers and subscription conversions facilitates the activity change needed by editors to classify more content as subscriber-only. Though subscription conversion is not a traditional success measure, editors and reporters take pride in creating valuable content, thus this metric is not seen as potentially compromising values (Townley, 2002). Readers who convert to subscribers validate the value provided by their actions of becoming subscribers thus this metric provides valuable feedback reinforcing actions (Plowman et al., 2007; Weick, 1979). One reason why feedback metrics may play such a central role is research on change shows that positive feedback reinforces activities that generate this feedback (Dutton & Dukerich, 1991; Ibarra, 1999; Plowman et al., 2007).

My analysis reveals, however, the visibility of feedback metrics also play a role. Examples in the literature on the importance of feedback during renewal such as Plowman et al. (2007) and Dutton and Dukerich (1991) provide examples of visible feedback. For instance, Plowman et al. (2007) provides an explanation of how the presence of both positive and negative feedback creates instability and this can amplify the impact of small changes to activities on the overall system of activities. Dutton and Dukerich (1991) also show that negative feedback to image can trigger change as organizational members seek to rectify the negative image. My study builds on these by showing that the visibility of feedback will impact this adaptive activity. For example, sources offer informal feedback to reporters and editors but this metric is relatively

hidden from view of others. Having less visible feedback, however, does not mean it is of lesser significance to those receiving it.

Feedback metrics are important to maintaining a sense of identity (Swann, 2011).

Though this statement applies to research at the individual level of analysis, as my findings show occupational members are performing activities. Thus to understand why metrics are important, it is useful to examine the general link between feedback metrics and activities. According to self-verification theory, individuals can communicate identity through “identity cues” and actions (Swann, 2011, p. 27). For example, cues such as carrying a spiral pad and pen may signal ‘reporter’ and actions such as publishing an article in a newspaper may signal ‘expert’. According to self-verification theory, individuals will seek feedback that verifies these views. For instance, in my findings I have several quotes from reporters explaining the significance external feedback has for them personally. As Jessica states, “Feedback from your beat is massively, massively important.” Part of validating occupational identity is receiving external feedback on this identity (Ashcraft, 2007). Research in more macro settings supports the link between external feedback and social identity. As raised above, negative feedback regarding an organizational image in Dutton and Dukerich (1991) prompted the Port Authority to take corrective actions to counteract this negativity. Similar to organizational identity, given its public nature, occupational identity is created and maintained externally in the form of an occupational image (Ashcraft, 2007; Kreiner, Ashforth, et al., 2006). At least for the editors and reporters in my study, maintaining the image of ‘expertise’ and ‘gatekeeper’ are important components of their occupational identity and external feedback from sources help to reinforce this. Consequently, self-verification theory coupled with work

on the role of image provides some external validation for my findings around feedback metrics. It also highlights challenges for organizations where identity verifying feedback metrics may not necessarily coincide with visible feedback metrics. One example I raise in my findings is the feedback metric of industry awards. Though this is one measure of quality and influence that is generally accepted, it is very visible. As a result awards may receive more attention than less visible but equally important metrics that reinforce occupational identity.

Feedback metrics are also a mechanism leading to resistance as my example regarding the change to editing suggests. As my discussion in Section 5.2 highlights, one reason for this resistance is similar to the concern articulated by Townley's museum professionals; metrics can alter activities in ways outside acceptable 'strategies of action'. Henry's lament on the 'benefit' of changing editing highlights this concern. Assessing feedback as 'positive' then depends on who is making this assessment. For example, certain members of NatNews can interpret meeting deadlines and avoiding financial penalty as positive feedback. For others, the self-verifying feedback metrics from sources on quality or expertise is of greater importance, raising an interesting question on the role of metrics. For example, in a similar way to qualitative and informal feedback from readers and sources on quality, subscription conversion metrics can be seen as self-verifying as it also provides one way of evaluating the quality of the content.

Until now, my discussion has focused on grounding my findings in established streams of research which provides a foundation to move the discussion from understanding my findings to exploring how they impact our understanding of strategic renewal.

5.3 Incorporating findings into strategic renewal

The findings outlined in the prior two sections contain several key nuances in our current understanding of strategic renewal. First, as depicted in Figure 2-1, strategic renewal and occupational identity are intimately intertwined via their shared focus and importance on organizational activities. What was unclear at the outset of this study was exactly the nature of this relationship, which I can now begin to answer.

Activities are central to strategic renewal as drivers of economic value via their role in the creation of a product or service (Porter, 1996). Activities are also important repositories for knowledge (Nag et al., 2007), which strategy theorists have long argued is a source of competitive advantage (Kogut & Zander, 1992). Research on occupational identity shows activities are important for maintaining components of an occupational member's identity including expertise (Anteby, 2008) and values (Van Maanen & Barley, 1984). Research on strategic renewal does not account for this multi-faceted conceptualization of activities. My findings reveal the need for strategic renewal research to consider activities as not only sources of economic value and knowledge but also as vehicles for enacting beliefs, values and meanings. Incorporating the importance of who is performing the activity and where it is being performed enhances the explanatory power of activities.

I return to the definition of strategic renewal provided by Albert et al. (2015, p. 213) as “the incremental process through which an organization continuously adapts to the environment and explores opportunities to invoke change in its activity choices and outputs.” In their article, Albert et al. (2015) make several compelling arguments on how

organizations can overcome inertial tendencies in highly interdependent systems to successfully engage in strategic renewal. Their suggested strategies are logical if the challenge of interdependency lies with the economic or practical function of these interdependent activities. My findings show, however, that activities are not only the building blocks of economic value in organizations but are also repositories of meaning triggered by their very enactment. To further complicate matters, there are few 'if-then' rules to draw on at NatNews, a key facet of Albert et al. (2015) arguments. Instead there is a relatively wide array of acceptable actions as the debate among editors regarding how to enforce the matching policy highlights. To take this one step further, though activities create knowledge and economic value the enactment of activities are guided by 'strategies of action' which are flexible and heavily influenced not only by beliefs and values but also the immediate contextual conditions facing those engaged in the activities. These 'strategies of action' are embedded within the activity itself. In other words, changes to activities potentially alter all three of these elements. Strategy researchers need to consider implications beyond the economic value supporting functions of activities. Hence, this finding enhances our understanding of the complexity of strategic renewal and answers the call by a recent special issue on strategic renewal suggesting more work is needed to understand how organizations engage in strategic renewal when their institutional environments are in flux (Floyd et al., 2011). It also highlights the need to bring alternative lenses into research on strategic renewal.

There are important consequences to adopting my proposed view of activities. First, strategy research needs to focus on what activities are being performed, how they are being performed and who is performing them (Balogun & Johnson, 2004; Jarzabkowski

et al., 2015) in order to fully grasp the interdependencies between activities. The strategy-as-practice approach suggests studying intersections between practitioners, practices which include '*traditions, norms and procedures for thinking, acting and using things*' and 'praxis' or activity (Whittington, 2006, p. 619). I do not examine practices per se, but my findings provide evidence that who performs an activity is consequential in strategic renewal as it is intimately linked to the activity itself. For example, outsourcing editing does not change the function of copyediting and headline writing activities. Instead, the internal resistance originates from the impact outsourcing has on the 'strategies of action' the remaining editors and reporters use to enact their belief in 'we are the best'. It also changes the nature of the relationship between elements in the overall process. With this change and the centralizing of the 'first edit' function, editing is becoming more anonymous and performed by generalists as opposed to specialists. The substantial change is not to the function of the activity, but to the other equally important elements. Though I do not have causal connections in my data, the concern expressed by editors and reporters remains. If too much 'good enough' becomes part of activities this will change the activity itself. In other words, who is performing an activity has important consequences not just for the function of the activity but also for how occupational members are enacting their beliefs and values.

The above discussion also reveals a nuance into transferring capabilities within the same organization. There is the assumption that knowledge can be tacit but skills or activities, if codified, are transferrable (Winter, Szulanski, Ringov, & Jensen, 2012; Zollo & Winter, 2002). As a result, transferring capabilities focuses on the difficulty of transferring knowledge or skills (for a review see Argote, 2013). Based on my findings, I

argue that it may also be difficult to codify all elements of activities as some are accessed when enacted as opposed to being embedded within the activity itself. Additionally, the enacting of an activity is closely tied to the context within which it is enacted. As my data shows, how editors and reporters determine thresholds for ‘facts are the foundation’ or ‘we report without fear or favour’ is a delicate balance between acting within the guidelines of their ‘strategies of action’ and operating under their immediate constraints. Warren, an editor, came up with an alternative to creating an analysis of an economic event, as his economic savvy reporters were not available. It is difficult if not impossible to codify the multiple iterations of these activities. Even providing the beliefs as guidelines is insufficient given the variety of ways they are enacted. One core reason is because activities are relational and constructed every time they are enacted (Bechky, 2011). A change to one element impacts the overall activity.

In their study of flute making, Cook and Yannow (1993) find that flute makers from one organization still require additional training even when they perform the same activities at a new organization. “Although each individual possesses’ the know-how needed to do her portion of the work on the flute, she cannot use that knowledge to produce an entire flute on her own, nor could she produce quality work in the style of a particular workshop except in that particular organizational context” (p. 381). Their conclusion is that doing and knowing are cultural and largely tacit thus embedded within the organizational context making activities difficult to replicate. Long, Bowers, Barnett, and White (1998) examine the research performance of academics and find that the current institutional affiliation is more strongly associated with performance than the institution where the same academics received their training. In other words, training at a

specific university is less an indication of research productivity than factors related to the current institution of a researcher. These findings suggest that the context where activities are enacted plays a more fundamental role in performance than training and expertise. My results along with the findings from the above research provide evidence that activities are more complex than repositories of function and knowledge. Contextual conditions are an important factor in enactment and thus central to the activities themselves.

5.4 Limitations

As with all research, this study has several limitations. I chose a single-case study as my primary goal is theory elaboration (Lee et al., 1999). Single-case studies are not unusual and have been used in several influential studies (e.g. Gioia & Chittipeddi, 1991; Plowman et al., 2007; Siggelkow, 2002). One concern is that single case studies may potentially limit the generalizability of findings, however, I do several things to assuage this.

First, I had two clear objectives for selecting an organization: it had to be actively engaging in strategic renewal and it had to have a large population of somewhat homogeneous members of an occupation. NatNews is one of many media organizations, but it is visibly experimenting with strategic initiatives to survive and thrive in the ever-changing media landscape. Examining an organization that is actively experimenting and shifting is necessary to address my research question. Second, I needed to study an organization with a strong occupation embedded within it to make clear linkages. For example, I considered libraries, universities, hospitals and schools. The challenge with

each of these contexts is that none are facing challenges on par with the media industry. Given my constraint of a one-year study, I needed to select an organization where my observations would yield as much data as possible to answer my question. Thus, the first way I combat generalizability is that I do not suggest that NatNews is representative of all organizations. In fact, I selected it based on the appropriateness to address my research question. Or in the words of Siggelkow (2007), choosing NatNews allows me to “gain certain insights that other organizations would not be able to provide.” (p. 20)

Second, I conducted my study over a one-year period. At the time I did not realize how important this would be for my data collection, but it is a design choice I am happy I made. NatNews had just emerged from some collective bargaining talks and points of contention feature strongly in my first interviews. By the time I started my field observations much of this had subsided and it allowed me to broaden my focus quite substantially. The second round of interviews conducted one year after the commencement of my study were more balanced in terms of the discussion. Consequently, this research design choice helps to temper any narrow focus my informants have based on recent events.

Third, I rely equally on interviews and observation notes for my data analysis and findings. I made notes from one day to the next of unanswered questions and tried to follow each thread until I felt I sufficiently understood an issue. Given the time constraints of my informants this was not always possible, but triangulating where possible helps strengthen my findings.

Fourth, I gave two presentations and gathered informal feedback on models of activity systems I created during my observation period. The feedback and dialogue stemming from these was incredibly helpful in verifying some of my observations and highlighting where I needed more information. Additionally, I used the archival documents I gathered to triangulate and provide context for my findings but did not use them as a source for new information.

Fifth and as mentioned in Chapter 3, I have no background in journalism and purposefully limited reviewing research in this field until well into my observational period. I did this to ensure I was truly relying on my case data to arrive at my findings. Only once I had preliminary findings did I begin to read studies conducted in other newsrooms. I am not without bias, and will admit that through this process I became a believer in the importance of media. In spite of this, by limiting my bias at the beginning of the study I was able to gather and analyze my data in a more critical fashion.

Finally, my goal was to uncover general mechanisms applicable to organizations. The fact that I could find some similarities between my findings and other research in very different contexts (e.g museums, transportation company, church) is reassuring. That being said, my findings are most relevant to organizations with an occupation that has a central influence on the identity and culture of the organization (Kreiner et al. 2006) such as those found in creative or craft-based industries.

5.5 Future research directions

Until now, the focus of my analysis has been on understanding how strategic renewal and occupational identity are related through activities. There are several questions that

emerge not only from my findings but also through my data collection process that provide ample opportunity for future research.

First, strategic renewal is about changing both activities and outputs of those activities (Albert et al., 2015). Activities and outputs are linked as outputs stem from activities but it is less clear if the same mechanisms linking occupational identity to strategic renewal via activities hold when we consider outputs. There are strong arguments why they may be similar starting with the function of outputs. Similar to activities, outputs or products/services are created to generate economic value. To put it another way, activities are the engine of 'creating' and outputs are the result of these activities. Based on my above findings, however, it is difficult to accept that outputs have purely an economic function. For example, in this dissertation, editorial content is an output as is a newspaper, website and app. Different work and activities go into creating each of these outputs.

As discussed in Chapter 4, the public nature of editorial content means the product plays an essential role in connecting members of an occupation with external constituents, including consumers of the product. Multiple quotations on the central role of feedback from sources support this statement. What is interesting, however, is this feedback is unrelated to economic value, the 'function' of outputs. Instead, reporters and editors use feedback to self-verify components of their identity such as 'expertise'. Recent work by Elsbach (2009) on creative workers shows how designers of toy cars signal their identity by designing cars reflecting a specific 'signature style'. In other words, "signature objects or artifacts may be an important means of signaling occupational identity." (2009:1064). Furthermore, Elsbach discusses the important role external stakeholders

have in confirming the occupational identity, in this case the specific expertise, in the eyes of the occupational members' themselves. A very preliminary discussion already suggests that thinking of outputs in terms of their function alone is necessary but incomplete as outputs are also a way to capture knowledge and expertise (Bechky, 2003).

Another study challenging the emphasis on outputs as function is the examination of homer (illegally made mementos) making in an aeronautical plant by Anteby (2008). Anteby states, "Craftsmen identity was made up of three components - opposition to unskilled workers, skilled manual work and independence" (2008:207). Anteby shows that the reason plant management tolerates the illegal homer making is management realizes craftsmen, as members of occupations need to enact their identity in order to maintain it and the author posits this is a form of managerial control. In other words, outputs can serve functions outside of economics as well. My data suggest this is also the case at NatNews. If editorial content is purely functional then there is no reason for editors and reporters to resist changes if the function is intact. Thus, implementing a matching policy should be straightforward as it only serves to benefit reporters by reducing their workload and keeping the function of the content intact. My brief analysis is far from complete but highlights the importance of moving away from functional and fit arguments as these fail to capture the complexity of strategic renewal.

Second, there is an opportunity to better understand my finding regarding the transferability of capabilities across the firm. I suggest that what an activity is, how it is being performed and who is performing it is a relational process. I suggest one potential ramification of this is changing one of these elements alters the meaning associated with the activity. Consequently, focusing on the difficulty in transferring knowledge as they

related to capabilities provides necessary but insufficient explanation for why transferring capabilities is difficult. For example, as part of their efforts to generate revenue, NatNews along with many of their industry peers are experimenting with creating various types of advertiser sponsored content. According to a discussion paper published by the Ethics Committee at the Canadian Association of Journalists, the creation of this content is ubiquitous and increasing. Though a full analysis of this particular initiative is outside the scope of this dissertation, I have some evidence that this type of content raises concerns for some reporters and editors. An interesting observation regarding this, however, is creating this type of content requires very few changes to the activities of reporters. Yet reporters express relief when they avoid these types of assignments. My findings regarding the multiple elements of activities shed some insight into this reaction, however a deeper analysis is warranted.

Third, there is an opportunity to focus on the shifting dynamics and relational interactions in the newsroom to yield greater insights into coordinating for strategic renewal. For example, a quotation from Jessica regarding the continued focus on journalism awards as a measure of quality raises some questions. At NatNews there are reporters who focus their efforts on subscriber-only content. The majority of this content is limited in length and does not meet the criteria for most journalism awards. How is quality of this content assessed? How does this impact the way resources are being allocated? How does this affect power dynamics between reporters and/or editors and reporters?

Fourth, another potential area to develop is to map interactions based on the type of constraints (financial, time, space) to yield insights on our understanding of connections

between constraints and work. There are multiple types of constraints in my data but though I noted this in my memos and coding I did not explore the implications of this. There are both beneficial and detrimental aspects of constraints in my data. For example, my analysis suggests it is not necessarily the lack of resources that editors and reporters are grappling with at NatNews, but what the lack of resources is forcing editors and reporters to do. Operating in a resource-constrained environment forces reporters and editors to make trade-offs in foundational beliefs and values thus shifting the meaning associated with enacting these beliefs. Though I do not have any quantifiable metrics, there is anecdotal evidence that strategic renewal challenging beliefs is more costly to implement in terms of time and resources both financial and human. Vignette three describing the changes in editing provides ample evidence that editors were actually re-doing the work NatNews was paying an external firm to do. Not only is this costly financially, but it also impacts the quality of the work, the very thing editors are protecting. There are hidden costs as well and though I did not explore the impact on workload, this quotation provided in opening paragraphs of Chapter 4 is indicative of the issue,

“Here the challenges, of course, I'm busy. My editors are busy. We're in this crazy situation where there's a multiplication of platforms so it requires more resources, but we haven't increased the reporting resources. The primary material, the information, is still provided via the same number, or even a shrinking number of reporters, but you need to hire more people to tend after the mobile platform, the website, a whole bunch of people who are doing functions that didn't exist before because essentially, we're operating two concurrent businesses, a newspaper and a website. We're in that phase where we have to do more with the same resources” (Tammy: Reporter).

On the other hand, constraints also have a positive role in my data. For instance, reporters and editors state one challenge with the digital versus print product is the print product contains space constraints whereas the digital product is infinite. I did not analyze what this means and it is only an observation but I raise it as a potential area for future research. I focus more on the negative aspect of constraints (limiting behaviour) but also see potential for a more holistic examination of the role of constraints.

5.6 Concluding thoughts

At the outset, my goal was to bring together two disparate but vital areas of research. Strategic renewal research addresses a fundamental challenge facing most organizations at some stage in their life cycle. Similarly, occupations are present in many organizations and research in this area has deep roots. In fact, research suggests that the importance and influence of occupations is growing (Barley & Kunda, 2001). In spite of the importance and natural overlap between these fields there are very few studies at the intersection. My dissertation begins to close the gap by providing findings that bring these areas together.

My findings are unexpected. I did not foresee the contradictory nature of beliefs or the important role resolving tensions has in everyday interactions. Furthermore, the observation that beliefs conflict and that these conflicts are generative is not present in the literature on strategic renewal or occupational identity. There is no theoretical reason to assume that conflicting beliefs and tension resolution do not exist at other organizations. Fortunately, the context at NatNews provides a unique opportunity to witness this phenomenon in action as editors and reporters are constantly resolving

tensions in order to get the job done. For this reason alone my use of a single-case study proves to be revelatory (Siggelkow, 2007; Yin, 2003).

As a strategy scholar and educator the most practical finding from this dissertation is around the multiple components of activities. The realization that activities are not only sources of economic value and knowledge, but also vehicles for enacting beliefs, values and meanings is one I will take forward into future research and into the classroom. It is easy to become enamored with the concepts of fit and alignment as it simplifies our frameworks and enhances generalizability. After conducting this research, however, I fully embrace the ‘messiness’ of organizations and strategy and look forward to building on my findings in future research.

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Appendices

Appendix A: Ethics approval



Research Ethics

Use of Human Participants - Initial Ethics Approval Notice

Principal Investigator: Dr. Mary Crossan
File Number:105098
Review Level: Delegated
Protocol Title: Linking Professional Identity and Strategic Renewal
Department & Institution: Richard Ivey School of Business/Ivey School of Business, Western University
Sponsor:
Ethics Approval Date: March 31, 2014 **Expiry Date:** December 31, 2015

Documents Reviewed & Approved & Documents Received for Information:

Document Name	Comments	Version Date
Instruments	Appendix E - Interview Protocol_Experts	2014/03/02
Instruments	Appendix B - Interview Protocol_Journalists	2014/03/02
Instruments	Appendix D - Interview Protocol_Executives	2014/03/02
Recruitment Items	Recruitment Email - Internal	2014/03/02
Recruitment Items	Recruitment Email- External	2014/03/02
Recruitment Items	Appendix A- Participant Recruitment	2014/03/02
Instruments	Appendix C - Interview Protocol_Internal, Non-Journalis	2014/02/28
Revised Western University Protocol	Revised Western Protocol - PDF	2014/03/16
Revised Letter of Information & Consent	Revised LOI-External Experts_Clean Copy	2014/03/16
Revised Letter of Information & Consent	Revised LOI-Internal Observations_Clean Copy	2014/03/16
Revised Letter of Information & Consent	Revised LOI-Internal Interviews_Clean Copy	2014/03/16
Response to Board Recommendations	Explanation of Changes	2014/03/16

This is to notify you that The University of Western Ontario Research Ethics Board for Non-Medical Research Involving Human Subjects (NMREB) which is organized and operates according to the Tri-Council Policy Statement: Ethical Conduct of Research Involving Humans and the applicable laws and regulations of Ontario has granted approval to the above named research study on the approval date noted above.

This approval shall remain valid until the expiry date noted above assuming timely and acceptable responses to the NMREB's periodic requests for surveillance and monitoring information.

Members of the NMREB who are named as investigators in research studies, or declare a conflict of interest, do not participate in discussions related to, nor vote on, such studies when they are presented to the NMREB.

The Chair of the NMREB is Dr. Riley Hinson. The NMREB is registered with the U.S. Department of Health & Human Services under the IRB registration number IRB 00000941.

Ethics Officer to Contact for Further Information

<input checked="" type="checkbox"/> Grace Kelly (grace.kelly@uwo.ca)	<input type="checkbox"/> Vikki Tran (vikki.tran@uwo.ca)	<input type="checkbox"/> Mina Mekhail (mmekhail@uwo.ca)	<input type="checkbox"/> Erika Basile (ebasile@uwo.ca)
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This is an official document. Please retain the original in your files.

Appendix B: Interview protocol - Journalist

Interview Protocol

Format – the interview is designed to be semi-structured and some of the questions below may be omitted if the questions are answered at an earlier stage of our discussion.

Additional probes may be used to clarify content such as: ‘tell me more about x’; ‘can you provide an example’. The order these questions are asked may change depending on the flow of conversation.

Educational Background

1. Tell me about your educational background.
2. Describe your career up until today? Is the NatNews your first employer? Where else have you worked, etc.?

Occupational Identity - Values

3. What inspired you to become a journalist? Was there a specific event or goal that motivated your decision?
4. Do you consider yourself a journalist above all else or is there another profession you identify more strongly with? Why or why not?
5. How would you describe your values as a journalist to someone outside the industry? Inside the industry? What, if anything do you think is a common set of values across all journalists?
6. What, if anything has changed in the world of journalism since you first began?
[may be answered in question 1 but probe on values/priorities, etc.]

Occupational Identity - Work

7. What is your role at NatNews? Describe a typical day or week in your role. How is your time divided between certain tasks?
8. Who do you interact with on a daily basis? What is the purpose of that interaction?
9. Has the actual work you do changed over the course of your career? How? What prompted these changes?

10. What, if anything has changed in terms of how things are done at the NatNews since you began? How have those changes impacted you (if at all)?

Strategic Renewal

11. What are the predominant values of NatNews?
12. Do you think members of the organization use these values to guide behavior?
13. How have these values changed over time?
14. What do you feel the top strategic priorities of the NatNews should be?
15. Describe any current or past changes that have impacted the way you work?
What has the impact been? Did it change over time? Would you describe it as positive or negative – why?
16. Which change (s) did you feel most strongly about? Why?
17. Out of all of the changes happening why did you describe these specific ones?
18. Compare a change you've supported over your career with the NatNews and describe why and how you supported it. How about one you were less enthusiastic about – tell me why this resonated less strongly with you. Did this lack of support or buy-in impact what you did? How?

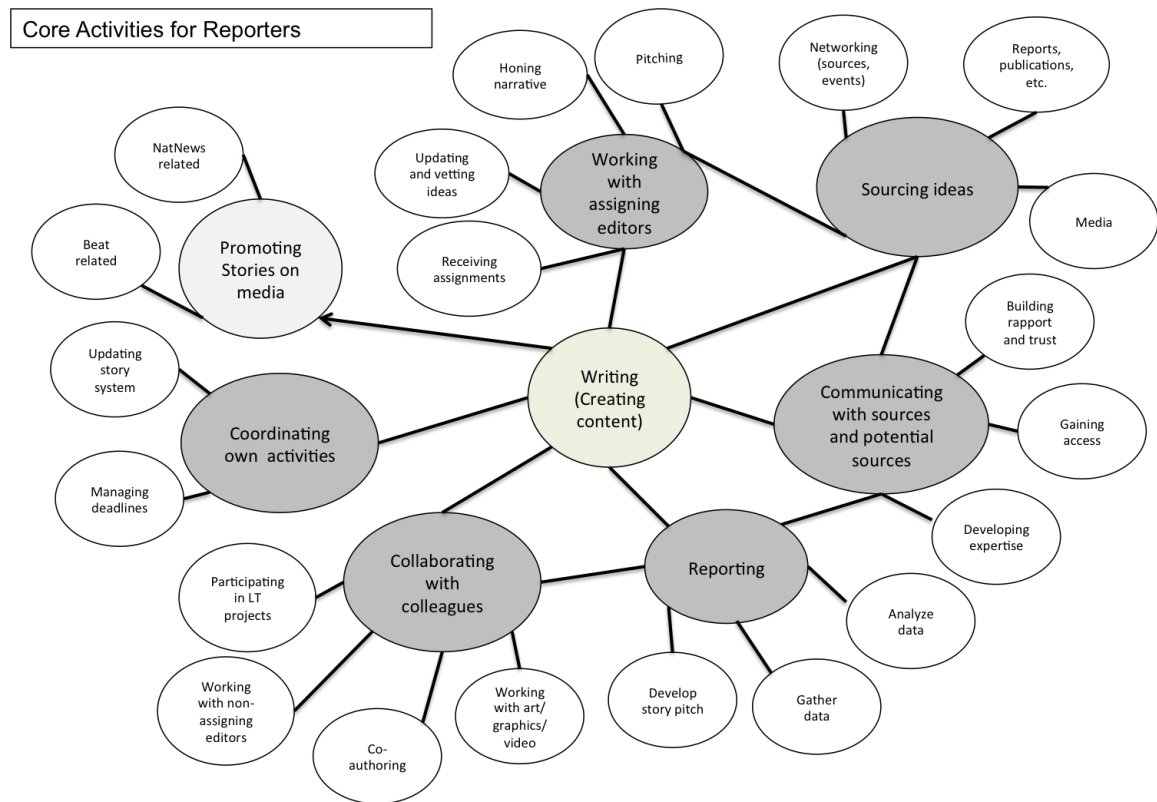
Appendix C: Interview protocol - Executive

1. What is your role at NatNews?
2. How long have you worked in this role? For NatNews?
3. Tell me about your educational background. What did you study at university/college?
4. What do you feel the top strategic priorities of the NatNews should be? How should the organization go about meeting these priorities?
5. What is your involvement in either planning or implementing the strategic changes?
6. Describe some of the strategic initiatives you've been involved in. What do you feel helps and/or hinders the success of strategic changes at NatNews?
7. Walk me through some of the key past and present strategic initiatives. Which ones were/are specifically aimed at addressing the transition to digital?

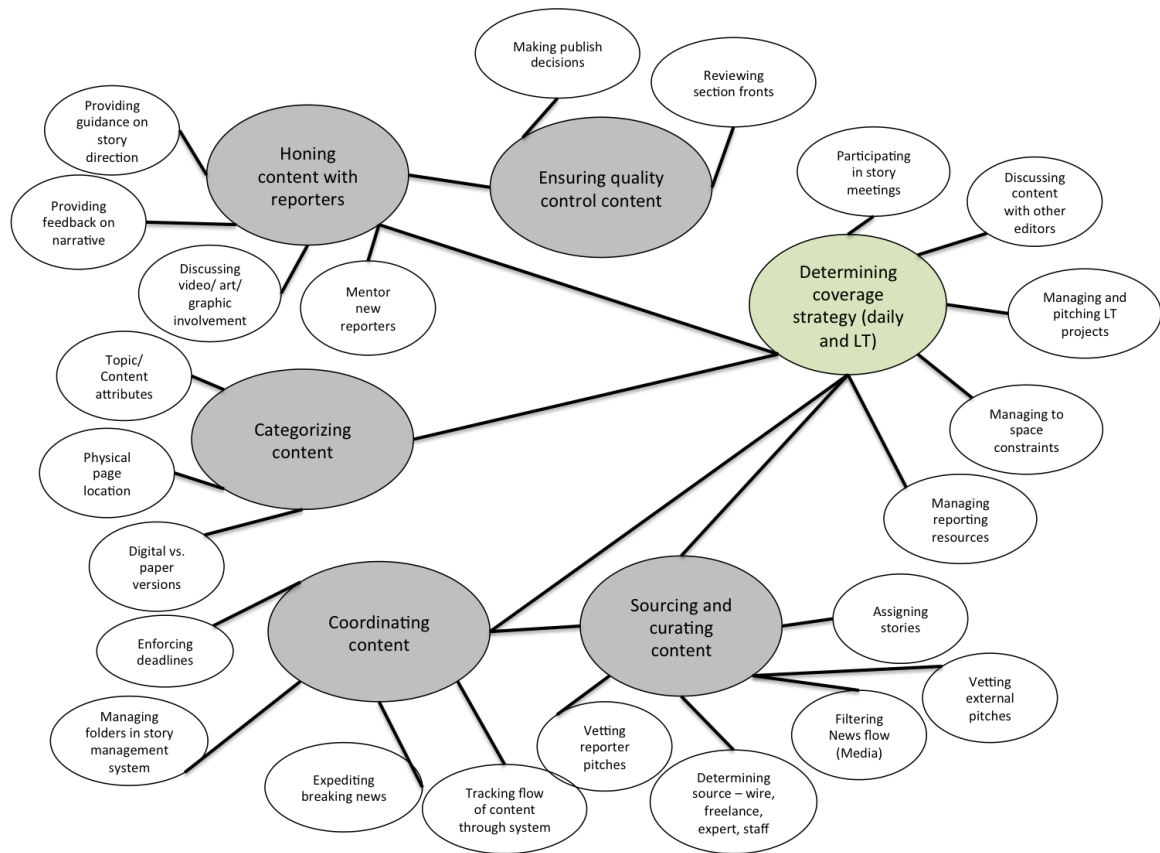
Appendix D: Interview protocol - Non-executive, non-journalist

1. Tell me about your educational background. What did you study at university/college?
2. What is your role at NatNews?
3. How long have you worked in this role? For NatNews?
4. Describe how you work with the journalists? How often do you interact with them?
5. Who else do you interact frequently with at the organization?
6. What do you feel the top strategic priorities of the NatNews should be?
7. Describe any current or past changes that have impacted the way you work with the journalists? What has the impact been? Did it change over time? Would you describe it as positive or negative – why?
8. Compare a change you've supported over your career with the NatNews and describe why and how you supported it. How about one you were less enthusiastic about – tell me why this resonated less strongly with you. Did this lack of support or buy-in impact what you did? How?

Appendix E: Relationship between activities: Reporters



Appendix F: Relationship for activities: Editors



Appendix G: Facts are the foundation: Coding table sample

Sample Meanings	Example from data	Within belief tension	Between belief tension and constraints
Facts are truth.	"I guess truth. There has to be trust between the reader and the newspaper or the radio show or whatever. If you have trust as a journalist with your readers, you're not changing quotes, you're telling them the story as you saw it, as it is, as it was, and that what's going to build your trust. If someone asked you about what journalism is, I would just say it's a trust between the reader. It's telling a story, telling it interestingly, and telling it first, too" (Reporter).	Espoused What reporters see is truth but is also biased by selection	Between: Speed and Best – must tell the story interestingly and quickly
Facts are statements are truthful statements covered by reporters.	"Just the facts, really bare-bone stories. No analysis, a real separation between reporting just facts and analysis, which gets a little closer to opinion., you did opinion pieces, you would never cover a news story" (Digital Editor).	Facts are not opinions	Between: Best – quality means analysis
Facts must be verified by credible sources.	"At this stage it's hard to report out. It needs to be reported but needs to have data. We don't need opinion but facts. Who is [Name]? Do we have some different areas of expertise we can tap into" (Editor)?	Facts must be verified by a credible source	Between: Speed – need to publish
Facts are what we know about events.	"We are all journalists – reporters, editors. We all make decisions about all the things going on that are true and factual in the world today. It's about taking all the facts out there and distilling it down to those we're going to share" (Digital Editor).	Selecting facts introduces bias	Between: Gatekeeper – minimize selection bias
Facts need to be confirmed in the editing process.	"He went on a rant about an error that appeared in the paper, a confusion between a million and a billion that should have been caught by editing. They didn't make the mistake because they don't know the difference, but because they weren't given enough time to do their job properly" (Reporter).	Precision takes time	Constraints: Resources Between: Immediacy

Appendix G: Contd.

Sample Meanings	Example from data	Within belief tension	Between belief tension and constraints
Facts are accurate.	<p>Reporter: What is the correct way to refer to this type of bankruptcy?</p> <p>Editor (Looking up something on his computer): It might be a 'complete bankruptcy.'</p> <p>Editor 2: I think it's closer to an 'all out bankruptcy.'</p> <p>Reporter: So which one do I use?</p>	Accurate language is essential	Between: Best – quality means accuracy
Reporters need to ensure they have the facts.	<p>“A lot of stories now are published with just a single source in them. And, it's sort of like a running story and you add the sources in as you go long. And, maybe in a day or so you got a complete story? But in the meantime, there's been 4 or 5 updates kind of thing” (Editor).</p> <p>“It's the same issue. There are 2 people here right now and a backlog of copy. Do you think the edits will be substantive” (Editor).</p>	Facts are central and should be verified to the best possible extent	Constraints: Resource; Time Between: Best
Facts must be presented in a way that is accurate yet memorable.	<p>“If we don't have people [a photo, a personal story] to attach this to, we won't reach, we won't communicate. There's this element of ... sort of entertainment. Knowing how to pitch things and obviously that can become very, it can become tawdry, you can get bogged down in things and it can become unethical. You can become involved in debates with your editors where they say, “Let's take this, bump it up” and whatever and you're kind of, “Well, that's not really this”. That's not really what the story is or that's misrepresenting it so there is always this tension I think between this very high-minded public trust. The notion that you're this organ of democracy on the one hand and the other hand they need to sell newspapers and of course, in the newspaper business or now a website run based on advertising and subscribers” (Reporter).</p>	<p>Selecting specific facts to highlight may be misleading</p> <p>Informing vs. entertaining vs. enticing</p>	<p>Between: Gatekeeper – minimize selection bias</p> <p>Fear or favour – it is possible to over privilege the reader</p>

Appendix H: We are gatekeepers: Coding table sample

Sample Meanings	Example from data	Within belief tension	Between belief tension and constraints
Gatekeeping is about influence.	“It has to the role of NatNews and it should be the role of anyone who wants to get out of bed in the morning. We need to fix the world – we need to make it better” (Senior Manager).	Espoused	N/A
Uncovering hidden information.	“It’s not sort of sitting on my pedestal informing you of all the things you don’t know kind of thing, but it’s the idea of trying to explain things that might not be readily apparent, in helping people be more informed” (Reporter).	Informing vs. Uncovering	N/A
We must inform the public. We want to make a difference through our reporting.	“We publish a lot of material. We always get criticized for bad news only, or focused on the negative, or focusing on salacious details. It does inform. Sometimes you do things that are a bit more consumerist maybe and drive the bottom line or drive our interests, even if I may not think they’re of the most important value. But I try to spend less time on that, and more on the impact element” (Digital Editor).	Informing the public may not lead to influencing	Between: Best - Balance between content that informs vs. influences
It is our responsibility to entice the audience to read what is important.	“But we think it’s important so instead of dropping it because our audience hasn’t found it the most engaging, we’re going to try to work it harder. Try to get them engaged. It’s interesting our audience will not click on something but there’s a belief that it’s still of value to them. ‘So I come to NatNews because they have a reporter who does really earnest reporting [event]. I may be happy just to read that headline. I may not want to read the story and click on it, but I’m happy NatNews has that there” (Digital Editor).	There is a balance between: informing vs. enticing vs. entertaining	Between: . Readership – ‘need’ vs. ‘should’ read Gatekeeping vs. Facts – what makes a headline ‘accurate’
Reader interests influence gatekeeping.	“The biggest change for me was that part of my job used to be chasing trend stories. Seeing what the digital audience, why the digital audience was consuming, trying to find a NatNews angle into that” (Digital Editor).	Entertaining vs. informing	

Appendix H: Contd.

Sample Meanings	Example from data	Within belief tension	Between belief tension and constraints
<p>Breaking news is an important part of gatekeeping.</p> <p>Expertise facilitates gatekeeping.</p>	<p>“If something really important happened on my beat while I was working on a big piece I would be expected to find the time to put aside..... It’s all communication based and my editor might come and say we need this and I might say I’m busy with []. They’ll say, ‘Yes, we really need you to do it and to put this aside’ or ‘It’s fine and we can give it to someone else’” (Reporter).</p>	<p>Breaking news vs. substantive news</p> <p>Specialist vs. generalist</p>	<p>Constraint: Reporting resources</p> <p>Between: Speed – Expert vs. speed</p>
<p>Creating substantive content is an important part of gatekeeping.</p>	<p>“If you execute the majority of your work to the substantive, deep reads that with it bring it time spent and engagement in an immersive, participatory quality to it, the revenue will follow” (Senior Manager).</p>	<p>Daily informing vs. substantive influencing</p>	<p>Between: Best - Deep analysis vs. broad beat coverage vs. fresh content</p>
<p>Gatekeeping includes promoting.</p>	<p>Editor looking at space available in paper: We can run a short story early in the week then post a video mid-week as a promo.</p> <p>Reporter: OK.</p> <p>Editor: We’ll post the video on Friday so no one can scoop you.</p>	<p>Good text may be insufficient to influence</p>	<p>Between: Best - Balance promoting with protecting</p>
<p>Gatekeeping involves prioritizing resources and coverage.</p>	<p>“It’s about what NatNews should be covering. When the [event A] was happening we sent somebody and there was a shooting in the church – we sent somebody down there for several weeks. And then we also sent somebody to [event B] for the anniversary, and you go why? We buy The New York Times, are we really going to do better than the New York Times on Event B? And the guy that we sent there, [name], was terrific, did a very nice job. But it was no better than what we got from the New York Times” (Editor).</p>	<p>Need to cover vs. want to cover</p>	<p>Constraints: Reporting</p> <p>Between: Best - Where to prioritize internal coverage</p>

Appendix I: Report without fear or favour: Coding table sample

Sample Meanings	Example from data	Within belief tension	Between belief tension and constraints
Reporting is autonomous.	“The idea of a free press is autonomy ... There’s a fundamental idea we are going to do our very, very best to bring this information to you, to tell the story to you in the most responsible way we can, and not allow our reporting or coverage to be influenced by any untoward factor, nor by our own economic interests” (Reporter).	Espoused	Between: Facts/ gatekeeping –removing bias
Reporting should minimize bias.	“In our section, we keep saying, if a reporter covers [industry] then they can’t own stocks for companies in that industry. They can’t cover stories about that industry if they own the stocks as they’d be biased” (Reporter). “It’s the perception. A lot of things in our business is that people use our work and they consume our work in a very subjective fashion. There’s always this big debate about how subjective reporters are but readers, news consumers, are very subjective onto how they want to perceive what you did and what they retain of it and how they decode it too. The least taint, the least shading that you want to do, that is the better. I’m talking in ideal terms” (Reporter).	Minimize bias by reducing conflict of interest	Between: Best – potentially limits leveraging expertise
Reporting should not be influenced by non-editorial factors but this is difficult to avoid.	“One thing we all struggle with is the balance between caring about how your stories perform, readership wise, and succumbing to a culture of click bait. You get more organizations competing for short attention spans and doing it with the shiniest thing. We need to manage it going forward because we can’t ignore it” (Reporter).	Readership needs vs. autonomy	Between: Gatekeeping – Is it important or driving
Advertisers should not influence editorial content.	“We went through this period a few years ago where people weren’t really using their own judgment and the homepage had this like naked yoga video on it. I’m sure you’ve heard about it... For months we had this naked yoga video pulled by popular automation... This was not editorial judgment. It was a clear case of ‘we need page views... That’s promotion [of content] driven by advertising” (Reporter)	Advertising vs. editorial	Constraints: Financial Between: Gatekeeping – Advertising impacts selection and placement
Advertisers indirectly influence editorial content.	“Every year we get a news gathering budget and we spend it and where does that come from? Advertisers” (Senior Manager).		

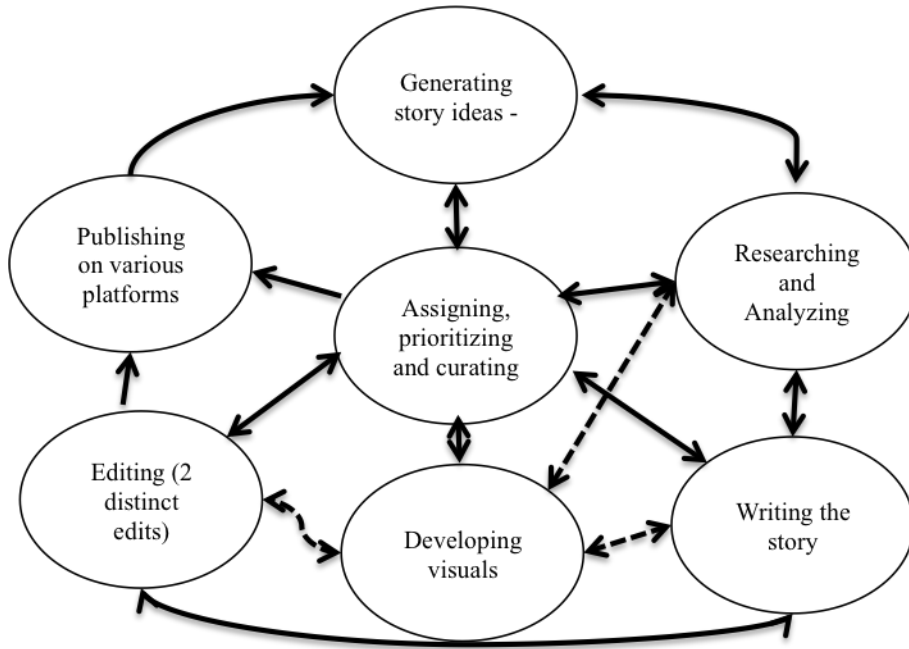
Appendix I: contd.

Sample Meanings	Example from data	Within belief tension	Between belief tension and constraints
Interaction does not mean influence.	<p>“We were covering [event name] and telling them [advertising] we were going to have 3 columns there or daily features her to tell our audience []. They can sell that and we need to make sure we’re positioning it to our advertisers correctly so they don’t come back. We share information a lot more than we used to because selling ads is more difficult and we have to be better. You know there was a way we could talk to each other about what we were doing without it impacting how we make editorial decisions” (Other Editor).</p>	Autonomy through separation	<p>Constraints: Financial Between: Integrity and trust – facilitated by separation</p>
Sources influence editorial content.	<p>“Reporter: I just came from their meeting and not much happened. They are doing x, but [name of wire company] was there so they’ll likely cover that. Editor: It’s up to you. What do you think? Reporter: Well I did briefly chat with [name of CEO], so he knows I was there... Editor: Hmmm. You can write something if you want and we can determine where it goes after.”</p>	Access vs. autonomy	<p>Between: Gatekeeping – need access to sources</p>
Reporting without fear or favour means reporting differently than peers.	<p>“If it’s part of the pack then it’s doing the same as everyone else and I tell you, it’s a rare beast when you have a choice to be lonely, or alone. You choose to be alone as opposed to part of the pack. The majority of journalists are used to going to the pack” (Senior Manager).</p>	Peer and source pressure to report similarly	<p>Between: Gatekeeping – conforming to expectations</p>
Readership needs drive reporting and selecting decisions.	<p>“The visual component impacts how I select stories. For example, a guy who writes code in his basement is far less interesting as a small business when you have to add in photos and video, than somebody who started a chocolate store. It has far more dimensions for readers and they would get chosen over something maybe less visual” (Editor)</p>	Story presentation vs. importance of content	<p>Constraint: Readership needs vs. content importance</p>

Appendix J: Tensions between core beliefs: Speed and 'we are the best'

Tension between	Example from data	Amplify or attenuate belief
Speed versus Facts are the foundation	“It’s not only about being right, but being first, and in an interesting way [as this increases readers]” (Reporter).	Attenuate → Time to triangulate and verify reduced
Speed versus We are gatekeepers	“When a story is happening, you think people would be tired of it, but they actually don’t. When there’s a huge kerfuffle about something like Rob Ford, you could write the most banal thing on earth, and if its on the website people will click on it, because they’re looking for more, more, more, more information. Speed was always important but has become very important. [...]There’s pressure to be fast, but there’s equally pressure to be right, smart, analytical and good” (Reporter).	Attenuate → Producing in depth analysis takes time and resources
Speed versus We are the best	“There’s a, I think there’s a greater tension now between, between speed and completeness. There’s much more willingness now to, to finish something and publish it, without going through the kind of steps that I was more accustomed to in the earlier part of my career” (Editor).	Attenuate → Producing quickly means removing steps
We are the best versus Facts are the foundation	“Fundamentally, if we can't deliver stories that people believe are true, then we don't have a business. That’s probably true for all journalism. I would think people expect more than just you know, 200 words on snappy facts of things that happened yesterday, or tabloid type news. That’s not what they’re expecting from us. They want, the inside look on politics, or they want the, want to know what’s happening in business [these are based on facts]” (Editor).	Amplify → Living up to external and internal expectations strengthens the belief in facts
We are the best versus We are gatekeepers	“One thing about NatNews is it has cache and trust. People started to return my phone calls the day I was hired. Nothing changed - I was still the same reporter. There is something to being associated with the organization. It matters” (Reporter).	Amplify → New and quick access to sources improves coverage
We are the best versus We report without fear or favour	“Its a lot of self-censorship. Because you're not allowed to say certain things. I can't break stories, I knew [name] got fired from [company] 8 months before it went on a press release and at the time I was told, you can't write about that. Why? We were collaborating with [company] on some content” (Reporter).	Attenuate → Preserving access and revenue may trump reporting on news

Appendix K: Editorial process



Appendix L: Importance of metrics: Coding sample

Example from data	Role	Link to Meaning	Attributes of feedback metrics		
			Positive or negative	Public (widely accessible) or private (accessible to only a few)	Qualitative or quantitative
<p>“So my biggest thrill in journalism is seeing the impact of the work that I do and that used to be seeing someone over brunch seeing the pages that I worked on in the news paper. Getting feedback from the audience. Now, it's seeing the audience's engagement online, metrics and comments, and seeing our work being shared positively or negatively. But it's that impact that has</p>	Digital Editor	<p>Influence - target</p> <p>Quality</p>	<p>Positive: Shows consumption (quant metrics and visual)</p> <p>Negative: May disagree with content (comments)</p>	<p>Public: Broad access to metrics</p> <p>Private: Must be present to witness consumption</p>	<p>Quant: On-line engagement, # of shares</p> <p>Qual: Visual confirm, comments</p>

really been the draw for me.”					
“It used to be about optimization, so making sure we hit our traffic targets. It’s shifted. So not necessarily going for the mass market audience, but making sure that the audience we have consumes as deeply, spends lots of time with us, because our goal is to get them to subscribe.”	Digital Editor	Influence - target	Positive: Consuming deeply leads to subscriptions	Public: Broad access to metrics	Quant: Time spent and frequency
“We were chasing the biggest audience. We were failing. Because those, getting people into, just to click on our content, wasn’t going to drive them into what we really wanted them to do, which was subscribe and engage and make it part of their hour by hour life.”	Digital Editor	Influence - Reach	Negative: Reach not converting subscribers	Public: Broad access to metrics	Quant: Number of clicks vs. subscription conversions Qual: Incorporate into daily life and decisions
“The reality in metrics we have are tremendously powerful, addictive to a degree, and we’ve kicked our habit a little bit of responding strictly to what the audience is doing and to being a bit more journalistically mature about what we do. There’s no clue in the paper, you hope that they’ve read it, you get good feedback in letters, you know over time, like they do surveys were they actually sit down and ask the readers, did you read that story?”	Digital Editor	Quality Autonomy	Positive: Digital consumption provides opportunity for feedback	Private: Focus groups, emails, surveys Public: Broad access to metrics	Quant: Track number of clicks, time spent, frequency Qual: Paper feedback is infrequent outside of solicited feedback or letters to editor
“We’ll put them both	Digital	Influence	Positive:	Public: Broad	Quant: Number

<p>on the website, and we'll see one story with the audience, and one go dead. We'll look and we'll say [] story got 20,000 tweets in an hour, yours got 2,000, next time, will you do it in this way? That's the only way we've convinced people. They want the audience and if it works for the audience, they're into it.”</p>	<p>Editor</p>	<p>Autonomy</p>	<p>Changing writing style can drive readership</p> <p>Negative: Writing style can impact readership</p>	<p>access to metrics</p>	<p>of readers</p> <p>Qual: Style of writing</p>
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Curriculum Vitae

Krista L. Pettit

Education

PhD (General Management and Strategy)

Ivey Business School, Western University, London, Ontario 2011 – 2016 (planned)

Master of Business Administration

Ivey Business School, University of Western Ontario, London, Ontario 2002-2004

- Dean's Honor List: 2002-2004
- Executive Director: The LEADER Project

Bachelor of Arts, Japanese Language and Literature

University of Alberta, Edmonton, Alberta 1991-1995

Publications

Pettit, K (2014) "Innovative Public Health in Alberta: Scalability Challenge" Ivey Case #9B13M067 and Teaching Note #8B13M067 under the supervision of Professor Anne Snowdon

Pettit, K, Crossan, M, Vera, D (Forthcoming). Organizational learning and knowledge: A Critical Review. In A. Langley and H. Tsoukas (Eds.), Sage Handbook of Process Organization Studies, Thousand Oaks, CA: Sage Publications, Inc

Preparing for Submission:

Bapuji, H, Hora, M, Pettit, K, Crossan, M " More is not always better: How Volume of Failure Experience Affects Organizational Learning " (Revising for resubmission)

Conference Presentations (Refereed)

Pettit, K; Crossan, M. (2016) "Bringing meaning in: Exploring the relationship between strategic renewal and occupational identity", 76th Academy of Management (AOM) Annual

Conference, Anaheim, CA. *Selected for Best Paper Proceedings. Runner up: Best Division Paper*

Pettit, K (2015) “Being and doing: Exploring the relationship between resource reconfiguration and professional identity”, 31st EGOS (European Group of Organization Studies) Colloquium, Athens, Greece

Pettit, K (2015) “Being and doing: Exploring the relationship between strategic renewal and professional identity”, Ontario – Quebec Qualitative Methods Workshop Round-table presentation, Montreal, Canada.

Pettit, K (2013) “Collective psychological ownership: An important latent contextual factor in organizational learning, knowledge transfer and change” 29th EGOS Colloquium, Montreal, Canada

Awards, Distinctions and Fellowships

C.B. (Bud) Johnston Ontario Graduate Scholarship, Ivey Business School, Western University 2014-15

Ontario Graduate Scholarship, Province of Ontario, Canada, 2014-15

Strategic Research Foundation Dissertation Scholarship. Strategic Management Society, Runner-Up, 2014-2015

Plan for Excellence Doctoral Fellowship, 2011-2015

Mical Equities Limited MBA Bursary, 2003

Plan for Excellence MBA Award, 2002

Alexander Rutherford Scholarship, 1991

Teaching Experience

Lecturer

Strategy, Fourth Year Core Course (Management and Organization Studies - Undergraduate): Brescia University College, Western University, Fall 2014 (Evaluation = 7/7), *Dean's Honor Roll of Teaching 2014-2015*

Strategy, Core Course (Honors Business Administration- Undergraduate): Ivey Business School, Western University, Winter 2015 (Evaluation= 5/7),

Strategy, Core Course (Honors Business Administration- Undergraduate): Ivey Business School, Western University, Winter 2016 (Evaluation= 6.5/7)

Academic Service

Reviewer – Academy of Management Conference, 2013, 2015, 2016

Ombudsperson, PhD Association, Ivey Business School, 2014 - present

President, PhD Association, Ivey Business School, 2013 - 2014

VP External, PhD Association, Ivey Business School, 2012 – 2013

Facilities Director, PhD Association, Ivey Business School, 2011- 2013

Professional Experience

- Client Services Director: PriceMetrix, Toronto, Canada (2004-2011)
- Operations Manager: Commerce One Japan, Tokyo, Japan (2000 – 2001)
- Sales and Facilities Manager: Servcorp Japan, Tokyo, Japan (1999-2000)
- Translator: Fuji Bank, Tokyo, Japan (1998-1999)