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Reorganization: An Exploration of Public Workplace Outsourcing, A Strategic Plan

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This is to certify that the doctoral study by

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has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

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Walden University
2025

Abstract

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Professional Administrative Study Submitted in Partial Fulfillment

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Abstract

An education agency experienced a decline in loan originations from 2013 to 2023, creating fiscal challenges that threatened service sustainability. This created a need for operational strategies to stabilize funding and preserve resources. The problem was significant to the organization and the community's ability to obtain equitable educational opportunities. The practice-focused question asked: What are the perspectives of staff and management concerning the agency's strategies to downsize and realign for sustainability? The purpose of this qualitative case study was to explore staff and management perspectives on downsizing and outsourcing as strategies to maintain operations. The study was informed by concepts of strategic downsizing and outsourcing in public administration. Survey responses were collected from persons across the organization and analyzed using Braun and Clarke's six-phase thematic analysis process, involving iterative coding, pattern recognition, and theme development to capture organizational perspectives. Findings indicated areas of concern regarding employee well-being, external relations, organizational culture, and efficiency in management practices. Recommendations included initiatives to strengthen workforce health, build community partnerships, and improve operational effectiveness; and were integrated into a strategic plan that addressed identified challenges and provided a framework for sustaining service quality. The implications for public administration practice include offering decision makers a structured framework to address fiscal constraints while maintaining service quality; and they support positive social change by safeguarding equitable access to educational opportunities and promoting community resilience.

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Dedication

First and foremost, I dedicate this work to God. It is through His grace, strength, and unwavering guidance that I have been able to persevere and complete this academic journey. In moments of doubt and fatigue, it was faith that sustained me.

To my incredible wife, your love, patience, and steadfast support have been my anchor. Your encouragement lifted me in moments of discouragement, and your belief in me never wavered. This accomplishment is as much yours as it is mine.

To Dr. Regier, thank you for your wisdom, mentorship, and for serving as the chair member of my committee with integrity and compassion. Your insights challenged me to think deeply and grow academically, and your support throughout this process has left a lasting impact.

To my family and friends, your belief in my potential, your words of encouragement, and your understanding during the many late nights and long hours made this possible. Thank you for walking this road with me.

This dissertation reflects the many people who poured into my life. I am deeply grateful.

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To my wife, your love, patience, and relentless encouragement gave me the strength to keep writing, even when I didn't want or believe I could. You never gave up on me, and for that, I am eternally thankful. Your partnership was my foundation during this journey.

To my committee, colleagues, and friends who offered insight, support, and the occasional push when needed, thank you for standing by me.

Each of you played a vital role in helping me reach this milestone. I am sincerely grateful.

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Section 1: Introduction to the Study

Post-secondary education, also known as tertiary education, includes universities, colleges, trade, and vocational schools all over America and internationally. Post-secondary education comprises any level pursued beyond high school, including certification, undergraduate, and graduate credentials. Alaska, the 49th state admitted to the union in 1959, has a rich history of education, including post-secondary education.

My client was an Alaska education agency that provides education planning, tools, resources, and financial aid. In this chapter, I describe the problem they were experiencing with decreased loan origination, organizational outsourcing, and downsizing. I then provide an outline of the research problem, the purpose of the professional administrative study (PAS), and the research question that frames the work that would be explored. Then, I discuss the nature and significance of the study and the potential implications for positive social change.

Introduction to the Client Organization

The education agency (a pseudonym) was my client. In most states, post-secondary institutions of higher learning seek multiple layers of approval before offering programmatic courses. All post-secondary educational providers must work with the education agency or be approved by the education agency; the purpose of the education agency is to ensure minimum standards are set out in law. State approval, such as the education agency, signifies that the institution has satisfied the minimum requirements established by the state; it does not mean the institution has achieved or maintained accreditation.

Created by the state legislature, the education agency's founding purpose was to centralize higher education planning and administer financial aid programs. A little over a decade later, the state legislature established a mechanism to fund the agency's programs and activities through alternatives. This change in legislation directly reflected declining oil prices and revenues as the state could no longer guarantee funding of the state's scholarship programs established in 1968 (ACPE, n.d.b). Like many state approving agencies, the education agency is overseen by a body established by law. The education agency's primary location is in Juneau, Alaska, with satellite offices in Anchorage. The education agency employs 48 staff, 37 in Juneau and 11 in Anchorage. Of these 48 employees, 34 are non-managerial staff, nine are managerial staff, and five are senior management. Education Agency staff carried out the directives of senior management pertaining to educational planning tools and resources, advocacy, support for postsecondary participation in Alaska, financial aid and career training, and educational consumer protection.

Background of the Problem

Over the past decade, loan origination has significantly decreased, causing a financial challenge that requires corrective action for the agency to remain sustainable in the changing educational environment. According to the Almanac (n.d.a), the class of 2019 saw a 15.5% decline in undergraduate students in comparison to 2011, the equivalent of nearly 11,000 fewer students (pg. 13). Graduate programs saw sharper declines equating to 19.3%, or nearly 1,100 fewer students than the peak student enrollment of new students in 2012 (ACPE, n.d.a). The education agency faced a clear

and existential crisis to remain strategically positioned with the changing educational climate in Alaska, exacerbated at the national level, senior leaders were desperate to build a pathway forward that allows them to continue to fulfill their promise to Alaskans pursuing educational pathways.

Problem Statement

Therefore, the problem is that the education agency was challenged to implement a cost reduction initiative to reduce personnel while outsourcing work functions and positions, but they had no strategic plan in place to meet this objective and remain a sustainable option for public service.

Purpose of the Study

The purpose of this qualitative study was to explore and identify the perspectives of the education agency staff and management regarding organizational downsizing and outsourcing, and to develop a strategic plan for its restructure and future sustainability.

Research Question

The research question for this study was as follows: What are the perspectives of staff and management concerning the education agency strategies that might be considered to meet its directive to downsize and realign the organization for future growth and sustainability?

Nature of the Administrative Study

This PAS was an exploratory qualitative case study that analyzed the client organization's organizational outsourcing and downsizing phenomenon. A qualitative case study is a research design that explores a phenomenon within its context using

several different data sources to ensure that the issue is explored through various lenses, allowing for multiple facets of the phenomenon to be considered (Baxter & Jack, 2008; Yin, 2018). Each data source, such as documentation, archival records, and interviews strengthens the data's credibility by allowing the researcher to create a comparison to qualitative approaches through the collection and integration of data to create a holistic understanding of the phenomenon (Baxter & Jack, 2008; Creswell, 1998; Patton, 1990; Yin, 2003). Qualitative research uses a process of naturalistic inquiry to seek an in-depth understanding of social phenomena within their natural environment, using multiple systems of inquiry to study human phenomena (Bowen, 2008). The client deliverable was a detailed strategic plan with findings from the study's analysis.

Significance

This study helped the education agency make strategic improvements and necessary adjustments to improve the agency's ability to remain sustainable and a viable option for the public. While there are many research programs existing and in progress that assess and provide a descriptive strategic plan for public agencies, to my knowledge, my research was the only work in progress or completed that assesses the pathway forward for positive social change at the education agency.

Significance to Practice

As the education agency struggles to advance loan origination while downsizing and outsourcing to restructure to be fiscally sustainable, this study had the potential to provide new or modifications to existing policy recommendations to advance the client

organization's mission. Potential findings might improve agency operations, increase services, and make public agencies more efficient and accessible.

Significance to Social Change

There were several potential implications for positive social change should the Board be able to adapt and restabilize successfully. First, Alaskan residents would have had a more affordable option to pursue postsecondary education through the partner agency. Existing interest and loan terms offered by the partner agency were very competitive and, in many cases, significantly more affordable than federal loan terms, allowing greater access to educational attainment, especially for underserved and minority populations. Secondly, as the state looks at continuing to expand educational requirements in the workplace, greater access to obtain the necessary skills or trade would be paramount to increase the publics likelihood of finding gainful employment, developing a positive social identity, contributing more as productive citizens, and maintaining stable family homes (Serriere & Mitra, 2011; U.S. Dept. of Education, 2020).

Summary and Transition

In this section, I presented and supported the position that the education agency, a provider of education planning, tools, resources, and financial aid in Alaska, requires guidance regarding the problem they are experiencing with decreased loan origination. With a focus on organizational outsourcing and downsizing, this PAS aimed to study the perspectives and experiences of staff and senior management to build a strategic plan with findings from the study's analysis. Before conducting any research, I created a well-

organized conceptual framework and thoroughly examined the background of the problem. Section 2 includes a presentation of this framework and its relevance, while explaining my role as a student researcher.

Section 2: Conceptual Approach and Background

Introduction

The problem is that the education agency was challenged to implement a cost reduction initiative to reduce personnel while outsourcing work functions and positions, but they had no strategic plan in place to meet this objective and remain a sustainable option for public service. The purpose of this qualitative study was to explore and identify the perspectives of education agency staff and management regarding organizational downsizing and outsourcing, and to develop a strategic plan for its restructure and future sustainability. The research question for the study asked what strategies the education agency should consider meeting its directive to downsize and realign the organization for future growth and sustainability. In this section, I built my conceptual framework to seek answers to the research question. Next, I discuss the relevance of my research to potential public organizations, and finally, I describe my role as a student researcher.

Conceptual Framework (Concepts, Models, and Theories)

The conceptual framework for my study was built into two parts: the client deliverable and the key concepts that frame the content of the study. Key concepts are introduced through substantiated assumptions, expectations, and beliefs associated with organizational downsizing and outsourcing in public administration. The framework acknowledges how organizational downsizing and outsourcing have been a pervasive mechanism of modern employment practices, and the shift in rational planning into strategic plans. However, the study also introduces limitations of ineffective

organizational downsizing and outsourcing as it pertains to the cost reduction and performance information that influences strategic planning as a framework to inform the basis of the research. The concept of survivors is relevant to this study, whereby surviving participants in an organization that has downsized provide unique employee perceptions and may advance the strategic plan more appropriately.

Deliverable to the Client

The intended deliverable of the study was to complete and provide a strategic plan that addresses the learned perspectives of the education agency staff and leaders about organizational downsizing and outsourcing. Due to decreased loan origination and annual budgetary losses from a changing educational landscape with decreased institutional enrollments, the client was struggling to remain sustainable. These deficits have caused the organization to look at ways to reduce its workforce size to meet budgeting constraints, including outsourcing public work to private organizations to meet downsizing directives. The organization did not have an appropriate scholarly-based strategic plan to solve its problem while restructuring the organization to meet future business needs.

Strategic planning was selected as the deliverable approach based on its ability to remain flexible based on organizational need, structure, and various internal and external factors, compared to other deliverables that may be more fixed. The term strategy dates back to 490 BC, derived from the ancient Greek strategos (Blackerby, 1994; Obój, 2014). Strategus, or in ancient Greek strategos, was the title of the commander of a Greek army, what we might call a general in modern times, functioning as a state officer. At the time

of their appointment, strategi's were elected to represent each of the 10 tribal units in the army, which formed a council; the council of strategi soon superseded the polemarch for commander of the army and the command of taxes (Obój, 2014; Wyrozebski, 2015). By the 5th century, strategi exercised political influence, including a heavy involvement in foreign affairs, assembly agenda maters, influence of treaties though it required ratification by the Ecclesia, and in some areas became supreme magistrates; this methodology of civil governors, strategi's, appeared in Egypt, and continued under Roman rule until the 4th century AD (Obój, 2014; Wyrozebski, 2015).

Advancing several hundred years later, formal planning courses first offered in 1909 led to the establishment of the first professional planning organization (American City Planning Institute) in 1917, with the first graduate program offered in 1923 (Mathew et al., 2020). The concept of planning led the Harvard Business School to develop one of the first strategic planning methodologies for businesses by modeling the program on purposes and policies affecting a business (Blackerby, 1994). Initially, formal planning was more exclusively accepted in consulting firms generating long-range planning documents, though the practice expanded after the Great Depression as a need for planning was required to support city and government development (Birch, 1980; Mathew et al., 2020). Throughout the 1950s and 1960s, formal planning shifted focus from public and city development toward industry growth, industrial conglomerates, and risk management (Blackerby, 1994; Mathew et al., 2020).

Throughout the 1950s and 1960s, theoretical framework emerged pertaining planning. The rational planning framework introduced by Edward Banfield in 1955 and

comprehensive planning introduced in 1956 by Martin Meyerson identified generic steps in planning and articulation of organizational planning (Banfield, 1959; Mathew et al., 2020). By the 1970s, attention shifted to the corporate environment, which focused more on growth; strategic considerations that shifted how scholars described long-range plans, they now identified these plans and coined them as strategic plans. Today, the focus is on developing strategic partnerships and generating advantages that reduce costs and bolster organizational performance.

Strategic planning components vary based on organizational need, structure, and internal and external factors. There is a level of semantics between agencies on what key components exist within a strategic plan; some have three, others have five to seven, whereas others have 12 or more. For the purpose of this study, strategic plans were comprised of five key components which include gathering internal (company) and external (micro and macro factors outside the organization) stakeholder information, organizational analysis (PEST and/or SWOT), development of strategic framework (mission, vision, values, etc.), implementation of developed plan, and regularly scheduled review periods (Beiko et al., 2018; Johnsen, 2016; Lindstrom, 2000; Porter, 1980). The deliverable is located in this study's Appendix, and my client organization and its affiliates will receive copies of the completed report.

Key Concepts in the Study

Two key concepts are organizational downsizing and outsourcing, which are modern post-20th-century employment practices. Thus, understanding these concepts can

be used to infer something about cost reduction and performance information that may influence an organization's strategic plan.

Downsizing

The conceptual domain of organizational downsizing and outsourcing, a pervasive mechanism of modern employment practices, is vast with a wide range of differences in use and application with conflicting research on the effectiveness of achieving the desired goal of cost reduction (Cascio, 2009; Day et al., 2012; McKinley et al., 1995). Downsizing related to the reduction of personnel, and outsourcing, defined as replacing internal goods or services through contracting outside the organization, has notably contributed to major approaches in executing modern developed organizational strategic planning. Reviews of research on downsizing suggest employee perceptions, better known as survivors of organizational downsizing, are a key component and a critical source of determining performance information (Appelbaum et al., 1997; Armstrong-Stassen & Schlosser, 2008; Frone & Blais, 2020; Tsai & Yen, 2020). If properly planned, communicated, and managed, downsizing can have positive outcomes, as seen in Armstrong-Stassen and Schlosser's 2008 study on Canadian federal government managers; whereas, the opposite affects can be characterized in Appelbaum et al.'s 1997 study of the aftermath of downsizing in corporate structures that fail to account for these areas of criterion for job survival.

A 1994 survey report indicated that more than 80% of Fortune 500 companies had downsized in the past 5 years with 100% commenting that they would be implementing some fashion of downsizing in the proceeding 5 years, with virtually every sector

impacted; these survey results indicated that more than half of the firms that downsized saw productivity deteriorate (Appelbaum et al., 1994; Cameron, 1994). Further, another survey conducted between 1986 and 1991 found that only 46% saw reduced expenses, 32% saw increased profits, and only 22% saw increased productivity (Appelbaum et al., 1994; Cameron, 1994). Other studies and published articles, like that of the Wall Street Journal, indicate that less than 50% of larger companies saw increased profits two years after restructuring (Markowich, 1994).

Noer found 12 different types of negative feelings and concerns presented in his work: *Healing the Wounds: Overcoming the Trauma of Layoffs and Revitalizing Downsizing Organizations* (pg. 90–3); these include:

1. Job insecurity
2. Unfairness
3. Depression, anxiety, fatigue
4. Reduced risk-taking and motivation
5. Distrust and betrayal
6. Lack of reciprocal commitment
7. Dissatisfaction with planning and communication
8. Dissatisfaction with the layoff process
9. Lack of strategic direction
10. Lack of management credibility
11. Short-term profit orientation
12. Sense of permanent change

During this time post-downsizing, it was found that many survivors felt tremendous guilt and contemplation of whether these layoffs were justified or should have been laid off instead (Applebaum et al., 1997; Noer, 1993). In most cases, many organizations have implemented survivor support plans. However, most failed to have effective plans that carried beyond the short term and instead focused on skill building rather than counseling or helping career-oriented individuals to adapt to the new organizational environment. Fast forward to IBM's or Kodak's late 1990s downsizing, which cost both organizations billions of dollars when downsizing their organization and restructuring, with tens of thousands of involuntary and voluntary casualties who walked away because of the lack of preparation or strategic thought in these changes (Appelbaum et al., 1997). Employees must feel the downsizing process is just and fair and that the methods used are appropriate (Rickey, 1992).

Outsourcing

As organizations entered the Industrial Revolution, companies sought new ways to increase market profits and assets. For most of the 20th century, many businesses consisted of large, industrial companies. The 1950s and 1960s brought with them the desire to diversify, but they faced bloated management structures as they entered the 1970s and 1980s, bringing a newly developed strategy focused on outsourcing (Mullin, 1996; SCRC, 2006). As organizations began to feel the pressure of lost profits and unstable markets, organizations worked to increase their flexibility and expand creativity that focused more on their core business. As organizations began implementing outsourcing into their business strategies, external suppliers revolutionized the business

industry, followed closely by outsourcing support services (Mullin, 1996; SCRC, 2006; Williams, 1996). These new cost-saving measures began producing results necessary to run the company more efficiently and leanly. Companies began to seek other areas unrelated to their core business that could be outsourced to continue implementing cost-saving measures in key areas of operations to improve financial outcomes.

Outsourcing better known as the replacement of internal goods or services through external contracting, also known as facilities management, is a strategy that allows an organization to contract out primary functions of their service or business to increase their competitive advantage via lower costs or some other differentiation of a competitor (Baraldi et al., 2014; DOVAL, 2016; Handfield, 2006; Prajapati et al., 2020). Post 1970, organizations began implementing outsourcing into their business strategies, which revolutionized the business industry, followed closely by outsourcing support services (Mullin, 1996; SCRC, 2006; Williams, 1996). Today, outsourcing and organizational downsizing are widespread and familiar to read about in the paper, in the news, or online.

Relevance to Public Organizations

Organizations throughout America and the world utilized outsourcing, organizational downsizing, and strategic planning. According to Prajapati et al. (2020), many organizations have survived significant difficulties within the past century, such as an uncertain economy, globalization, and frequent technological changes; resources play a critical part in the strategic decision-making consideration of supply and demand of products or services (para. 1-2). The education agency was no exception; as the demand

to pay for education decreased, the need to outsource the services that supply the remaining population increased. The services and products (offerings) the Board provides continued to adapt and deteriorate with each passing year.

A common theme found in the literature used to help improve cost reduction efforts for organizations, public or private, reference the implementation or continuation of a strategic plan as it is found to have a significant, positive impact across international settings (Akinyele & Fasogbon, 2010; George et al., 2019). This study's deliverables were unique given the education agency's unique structure and situation. It helped fill a gap in existing scientific knowledge with never-explored criteria surrounding a topic that has been extensively studied over the past forty years.

Organization Background and Context

In the state of Alaska, the client agency acted as an agency for higher learning. State approval, such as that of the education agency, signifies that the institution has satisfied the minimum requirements established by the state. Created by the state of Alaska Legislature, the education agency's founding purpose was to centralize higher education planning and administer financial aid programs. As of 2021, the agency's Mission states:

> The client agency supports access to and success in post-secondary education and career training after high school. Funded by the supporting agency, the agency provides:
>
> 1. Education planning tools and resources
> 2. Financial aid for college and career training

3. Advocacy and support for postsecondary participation in Alaska
4. Education consumer protection through institutional authorization
5. Research and analysis on Alaska's postsecondary education and financial aid programs

(Almanac, 2021)

According to the Alaska Higher Education Almanac (2021), the class of 2019 saw a 15.5% decline in undergraduate students and a 19.3% decline in graduate students in comparison to 2011 and 2012, respectively (pg. 13). Loan origination is what funds the partner agency and education agency programs, staff, and organization. The organization was pursuing outsourcing public work to private organizations due to annual budgetary losses and downsizing directives. The administrative study addresses the gap in practice with a developed strategic plan that addresses the key concepts of downsizing and outsourcing.

Role of the DPA Student Researcher

For the past seven years, I had maintained full-time employment as an administrator at a local College. That College operates under the approval and licensure of the education agency. As the campus administrator, I have a professional relationship with the client organization. Further, as of March 2018, I was appointed and have since served as a board member on the fourteen-member body that oversees the education agency as established by law. I was motivated to achieve my interest in completing my Doctorate in Public Administration at Walden University.

My second motivation as a volunteer is to aid an agency with a knowledge gap that could benefit from a scholarly research study to improve its organizational functionality, public contribution, and furthering positive social change through educational access within the Alaskan community. It was important for me to remain cognizant throughout the studies research of the role I have and previously held with the College, Board, and my position within the Community. The following subsections describe my student researcher role and perceived biases and conflicts of interest.

Student-researcher Role

As a student researcher, I took direction and advice from the agency's district attorney's office, the Executive Director at the education agency, and my doctoral committee. I managed my role as a student researcher separately from my role with the Board and as an administrator at a local College (see Appendix A for the signed client agreement). My initial conversation with Executive Director Efird outlined that future communication would be planned and communicated before executing any interactions with staff or senior leaders when collecting their responses. For this PAS, I intended to complete personal interviews with senior leaders and conduct a staff survey to collect necessary information. Details of these interactions would be described in Section three. No third-party assistance would be required to reach staff and senior leaders; I intended to personally perform all interviews, including the distribution, collection, and analysis of staff surveys.

Perceived Biases and Conflicting Interests

As a board member, I have direct and indirect influence over many decisions at the education agency, where the Executive Director, Senior staff, and staff are employed. Most actions require full board participation and a majority vote; however, I maintain a very amenable and professional relationship with the Executive Director and her staff. I made these circumstances visible to maintain the integrity of this study and acknowledge that I made every conscious effort in my role as a student researcher to refrain from attempting to control or alter the organization, its affiliates, staff, or members.

The Board and the ethics attorneys had implemented controls to mitigate potential risks. Based on these checks and balances, I was unaware of any potential conflicts regarding the PAS thus far.

Summary

This study was completed during a changing societal landscape surrounding free educational attainment and public administration. The Board was founded during a time when education was celebrated. There had been an increased focus on educational institutions to focus more closely on financial and academic outcomes in a broad and arbitrary methodology that fits societal changing norms, rather than institutional and historic standards. While there is still a tremendous focus on credible educational attainment, there has been a shift in priorities, focusing more on decreasing student financial burden and pursuing pathways that exclude education than examining the effects of these new requirements on institutions and helping them make the transition. For the purpose of this study, the approach remained focused on strategic planning and

the key concepts of organizational downsizing and outsourcing as existing methods of cost reduction efforts implemented at the education agency.

Section 3: Data Collection Process and Analysis

Introduction

The problem is that the education agency was challenged to implement a cost reduction initiative to reduce personnel while outsourcing work functions and positions, but they had no strategic plan in place to meet this objective and remain a sustainable option for public service. This qualitative study aimed to explore and identify the perspectives of the education agency staff and management regarding organizational downsizing and outsourcing; and to develop a strategic plan for its restructure and future sustainability. Large percentage changes in undergraduate and graduate enrollment in 2019 and over the past 10 years indicate that loan origination continues to decrease, and the decrease in funding threatens the sustainability of the partner agency and education agency programs, staff, and organization to remain in operation to serve the public. The Board was pursuing outsourcing and downsizing directives to meet the cost reduction efforts necessary to remain fiscally responsible. This administrative study addressed the gap in practice with a developed strategic plan that addressed the key concepts of downsizing and outsourcing. Key areas of Section 3 include instrumentation, protections, and analysis.

Practice-focused Questions

The central research question for this study is as follows: What are strategies the education agency should consider in order to meet its directive to downsize and realign the organization for future growth and sustainability? The research question appropriately

aligns with the purpose of this administrative study, as it aimed to fill gaps in information under the five key components of a strategic plan to create a client deliverable.

Sources of Evidence

The primary evidence generated by this PAS was surveying and interviewing education agency staff and management. The interview and survey questions used for this study are in Appendix B. They provided data for this study through a responsive interviewing approach based on the "conversational partnership formed between researcher and participant" (Hunter, 2013).

Surveys

All client staff (non-managerial) were issued a survey with the same open-ended questions. The survey was created using Google Forms (Google Forms), a free survey software that allows users to create and edit surveys online while collaborating with others. I selected Google Forms as a commonly used product that is widely and easily accessible by other researchers and the public. The survey contained the same heading, introduction, disclosures, open-ended questions, and any Walden University requirements for all respondents.

Interviews

Management members were to complete their interview via Microsoft Teams (Microsoft Teams). To arrange and complete the interviews, I requested management contact information from the Executive Director to arrange times to meet and review the line of questioning. All interviews consisted of the same introduction, disclosures, in-depth questioning, and any required Walden University requirements for all respondents.

With consent from the interviewees, I intended to record the interview to be more present and allow greater flexibility to transcribe later and place responses accordingly. If consent was given, I intended to utilize the Microsoft Teams record function.

As the client deliverable is a strategic plan, understanding staff and management perspectives at the education agency was important to develop the five key components of strategic planning to address existing gaps in their procedures. Open-ended staff surveys and in-depth managerial interviews provided invaluable stakeholder data that would improve the quality and applicability of the deliverables, while addressing the research question. Non-managerial staff and management were asked broad, open-ended, and expansive questions to decrease the potential of influencing or limiting respondent feedback. The sections below go into greater detail about how this is achieved.

Participants

Participants included non-managerial staff, managerial staff, and senior managers in Anchorage or Juneau, Alaska. All participants should be of legal working age in the state of Alaska. Participants were selected for surveys or interviews based on their employment classification/designation (non-managerial vs. managerial). There are three types of identifiers with randomly generated numeric values, which include (a) non-managerial staff, (b) management, and (c) senior management.

Surveys of non-managerial staff were selected through the simple random sampling approach by pulling every third participant from the eligible pool of thirty-four non-managerial staff listed, provided by the Executive Director. Due to the small population size, with 34 staff members being sampled, I sought a representative sample

of members in hopes that scores and the variation between members sampled would mirror the population (Levitt, 2021).

Interviewee information about managerial staff was classified with the same identifier types, with randomly generated numerical values to maintain anonymity. Management and Senior management were selected by their employment classification; all individuals were requested to complete an interview. Due to the small size of the population being sampled, with a combined total of fourteen managerial or senior management members being sampled from the executive directors' provided list, I sought a representative sample of members in hopes that scores and the variation between members sampled would mirror the population (Levitt, 2021).

Procedures

Procedures are provided in the following subsections categorized as interviews and surveys, as they would be executed differently with separate procedures.

Interviews (Management)

Management staff received an email notification 1 week before the interview period; this communication served as notice of the upcoming times available for an interview to be conducted, introducing them to the study, and clearly communicating the purpose as part of the invitation to participate. I used my Walden email to invite participants. I introduced myself and provided an overview of the problem, purpose, research question, and an attached informed consent release request. Upon receiving a completed response from a participant who selects "continue" or "accepts" a team's

interview, I emailed each participant to set up a Microsoft Teams interview using Microsoft's Teams license.

At the time of the interview, I read an overview of the study's purpose and background, followed by a complete list of instructions. I asked questions and recorded interviewee responses during the interview using a semi-structured technique. I recorded the interview using the Microsoft Teams recording tool. Recordings of the interviews have been saved to an encrypted folder on a removable hard drive during the study and then secured in a safety box thereafter. Upon reviewing recorded materials, there might be a need to revisit with an interviewed participant to clarify potential responses or information provided. In such cases, it would be communicated during the instruction phase of the interview that a follow-up interview may be required to validate interviewee responses.

Surveys (Non-Managerial & Managerial)

To distribute the survey, I intended to utilize a list of existing, actively employed staff provided by the executive director and her executive assistant for recruitment. All non-managerial staff, managerial staff, and senior management were asked to participate in the study's survey, and managerial and senior management were asked to complete an interview. No other criteria were considered for interviewee selection, excluding senior designations for interview purposes. I electronically issued the survey on the same day and time. Respondents were given the same time frame to complete the survey, 2 weeks (14 days). Non-managerial and managerial staff received an email notification 1-week before the survey's release, this communication served as notice of the upcoming survey,

introducing them to the study, and clearly communicating the purpose as part of the invitation to participate. I used my Walden email to invite participants. I introduced myself and provided an overview of the problem, purpose, research question, and an attached informed consent release request. Upon participants selecting “continue” or “accept” to the survey link, participants were automatically directed to Google Forms. All participants received the exact instructions, information, questions, style, and form. I collected completed surveys through the Google Forms application. Survey participants were only permitted to submit their responses a single time; no additional data collection events occurred for survey participants. Data collected from Google Forms and transferred into an Excel spreadsheet to be evaluated and recorded. Recordings were saved to an encrypted folder on a removable hard drive during the study and secured in a safety box thereafter. Should the initial attempt have resulted in too few participants, a second attempt would have been made exclusively with those who had yet to take the survey. Upon completing the survey, participants received a post-survey debrief procedural breakdown, including participant confidentiality and study participation, concluding with their exit.

Instrumentation

The following data collection instruments and sources used are outlined in Table 1.

Table 1

Collection Instruments and Sources

Data Collection Instrument	Source	Purpose
Microsoft Teams	Published	Recorded Interviews (audio and video)
Google Forms	Researcher Produced using Published template	Survey Implementation and Collection
Interview Protocol & Checklist	Researcher Published	Interview Structure and Support
External Hard Drive	Published	Data storage

There are many published data collection instruments for survey collection (Survey Monkey, Google Forms, NiceReply, GetFeedback, etc.), however, as survey questions are unique and specific to the study, they had to be individually tailored at the ability of the researcher (Creswell (2003, 2007); Gall & Borg, 2003; McNamara, 2009). While Google Forms is a published instrument, the questions, design, and scope are researcher-developed.

Microsoft Teams was developed and released in the first quarter of 2017 by Microsoft, a world leader in technology, data, and online services (Microsoft, 2016). Teams is used commonly in schools, colleges, places of employment, and cross-culturally, and internationally (Microsoft, 2016). This method of interview collection is appropriate given the barriers of distance between participants and the researcher. Additionally, all participants are familiar with and have access to the instrument.

The researcher developed the Interview Protocol and Checklist. A semi-structured technique or standardized, open-ended interview is considered a more flexible version of interviewing as it allows for in-depth probing and expansion on interviewees' responses (Akinyele & Fasogbon, 2010; Berg, 2007; McNamara, 2009). A checklist was used in conjunction with the interview. The advantage is that it allows an interviewer to remain

within the study's parameters while exploring interviewee responses (Berg, 2007, p. 39). Based on previous research, this is standard practice and procedure and is appropriately relevant to the study.

Protections (Ethical Procedures)

Many layers of protection exist throughout the PAS to ensure ethical protection of participants; these include the following areas: IRB board approval at Walden University; ethics approval from the education agency's attorneys; and notice of right to participate, consent, and withdrawal

All individuals were informed of the purpose of the study, all individuals would be of legal working age in the state of Alaska, and all participants would be made aware that participation was voluntary and that they could withdraw their consent at any time prior to analysis, where all identifying contact information would be removed.

For the purpose of data integrity, all data was retained for a period of five years in compliance with Walden University data retention policies. Data was defined as all materials collected, obtained, or analyzed in the pursuit of study completion from the client agency and any and all surveys, interviews, notes, recordings, transcripts, or acquired materials. All data was stored on a password-protected external hard drive.

Strategies for Recruitment. I utilized the curated list of potential surveyed/interviewees prepared by the executive director for recruitment. I ensured the target population is suitable and reasonable for my survey and interview purposes. No other criteria for selection would exist, except their employment designation (non-manager vs. manager).

Consent and Privacy

Consent and privacy of study participants were strictly monitored, and steps were taken to secure and protect collected data. I intended to communicate in writing (email) and verbally to all invited participants that their participation was voluntary and that they may opt out at any time. Invited participants were informed that even after agreeing to participate, they may withdraw from the study at any time for any reason without any prejudice or adverse actions or effects associated with their withdrawal from the study. Participants' personal identifiers were removed, and a unique identifier was assigned to strengthen anonymity and participant confidence. All participants' personal identifiable information was removed/deleted from the final data collection. During this study, I did not offer any incentives, promises, or conditions for participation. To maintain Walden University standards for informed consent, I utilized the Informed Consent form provided by the University to closely align the scope with the study's intent.

Client Organization Approval

My client has agreed to this study; please see the Service Order Agreement in Appendix A.

Walden IRB Approval

This study has obtained IRB approval. Approval number: 06-07-23-1017356 Expiration date: 06-06-2024

Analysis and Synthesis

I applied an inductive approach to analyze and interpret data collected from the study. The objective of utilizing an inductive approach is to examine information areas in

relation to the studies' deliverable categories. This approach allowed me to systematically break down a large amount of text from surveys and interviews into organized and concise results. This section describes my analysis system, procedures, and measures to ensure data integrity.

Analysis Systems

I utilized a thematic analysis (TA) approach, a widely utilized method in qualitative research to identify and code patterns, themes, or various data sets (Braun & Clarke, 2022; Elliott et al., 1999; Yardley, 2015). I selected this type of independent analysis as it is separate from the theoretical framework and allows me, as the researcher, the flexibility to apply any paradigm to the analysis. The following steps outline how I intended to utilize the system for analysis.

Analysis Step One: I included each interview's survey results and transcriptions with detailed raw narrative dialogues. Assuming enough surveys and interviews are collected, I identified each interviewee by name and survey collection results by randomly generated labels in their respective transcription. Upon completion of this step, I provided an opportunity to the respective survey participants to review, clarify any misunderstandings, and make necessary changes. Pending no changes, I verified there were enough participants to maintain a high level of credibility with the collected data.

Analysis Step Two: Interviews were collected into one document, whereas surveys were collected into a separate document in order to keep the tools and respective results separate. Prior to deleting any identifiable copies, I secured all the Step One documents onto a password-protected thumb drive as referenced earlier, which were kept

in a home safe until the minimum 5-year requirement expires in accordance with Walden University policy and procedures. Upon completing this storage copy, I deleted all copies from my computer devices, and I asked that all participants also delete or securely store their copies.

Analysis Procedures (Coding)

Codes were organized thematically with the use of a codebook or coding frame created by me. The following steps outline how I intended to code.

Analysis Coding Procedure Step One: Generate an entailed codebook within the master Microsoft Word System, supported by the matrix example shown in Figure 1.

Figure 1

Codebook Coding Matrix

Codes	Themes	Sub-themes	Explanations/Narrative:
Ex: Sustainability	Outsourcing	Job security	I am concerned about future growth and sustainability. Is there a future here, I'm not sure.

Analysis Coding Procedure Step Two: This step entailed more detailed coding, summarization, and recording. I intended to code narratives, emotional language, and other key characteristics using techniques that assimilate targeted and grouped phrases that correspond to a specific theme associated with the codebook. I also noted unexpected or supportive themes while incorporating those ideas into the content.

Analysis Coding Procedure Step Three: The final step encompassed compiling, organizing, and visualization of the categories and themes in a fashion that meets the

study's desired outcome to provide deliverables to all associated parties (Walden, Client, etc.). I presented these detailed findings and client deliverables in Sections 4 and 5.

Data Integrity

In this section, I explain what measures I intended to take to ensure the integrity of collected evidence, including approaches to managing outliers and missing information regarding credibility, transferability, dependability, and confirmability as supported by Maxwell (2012) and Creswell (2003, 2007).

Credibility

I found the following strategies appropriate to establish credibility. First, I acquired informed consent from surveys and interviewees to be good-faith data providers. Additionally, I applied source triangulation by using different data providers and the same data collection method (i.e., surveys and interviews). As referenced earlier in the study, this process entailed surveying staff and interviewing management at the client over different points in time while compiling their various perspectives. The source triangulation was further supported when each interviewee was asked to review and validate the accuracy of their raw narrative transcriptions. Further, reflexivity practices were implemented to increase credibility and confirmability as described in the subsection below.

Transferability

As the education agency is a unique entity within the public sector, in Alaska, results were tailored to be generalizable for similar-sized organizations within Alaska and similar types outside of Alaska. Because of this, generalizability restrictions were further

expanded on in Section 4. Survey and interview participants comprised a diverse and experienced group ranging from new hires to individuals with thirty-plus years with the organization. Gathered results were tailored to be transferable.

Dependability

I intended to ensure dependability by utilizing an outside researcher to conduct an inquiry audit regarding the general data integrity. Additionally, by separating survey collection and interviewee pools, triangulation further supported and enhanced the validity and credibility of the findings. Each data collection and synthesis phase was accessible, and all results were recorded. Further, I intended to fully outline and explain every step and process with participants, the client, and my committee before implementation, and during each phase of the study, once beyond the proposal phase.

Confirmability

According to Mortari (2015), reflexivity is conceived to be an important process with the aim of improving ethical standards pertaining research and researchers placing themselves and their efforts under scrutiny while acknowledging ethical dilemmas within the research process (pg. 2). Reflexivity includes reflection, perspectives, limits of reflection, and mindfulness (Mortari, 2015). I utilized a reflexivity approach to ethical stances towards this research study to ensure confirmability.

Summary

In this section, I provided details on the analytical framework for Section 2 and my outline for how I plan to answer the research question, including gathering sources of

evidence, procedures, and analysis and synthesis. Section 4 reviewed the study's results and introduces the findings collected.

Section 4: Results and Recommendations

Introduction

The purpose of the research study was to explore and identify the perspectives of the education agency staff and management regarding organizational downsizing and outsourcing, and to develop a strategic plan for its restructuring and future sustainability. The education agency was challenged to implement cost reduction initiatives to reduce personnel, while outsourcing work functions and positions without a strategic plan to meet this objective and remain sustainable. This PAS and the strategic plan in Appendix C fulfilled this study's purpose and answered the research question: What are the perspectives of staff and management concerning the education agency strategies that might be considered to meet its directive to downsize and realign the organization for future growth and sustainability?

In this section, I described how data was collected, including details about participant demographics. Additionally, I reviewed the processes of data analysis and how themes emerged from the data. Findings covered my evaluation and recommendations resulting from the data analysis and synthesis of evidence collected, along with possible implications resulting from the findings for the client and the broader community. The following section, deliverables and recommendations, includes recommended solutions that may address the problem, and how the results from the study were used to produce the deliverables for the client in the Executive Summary of the Study, in the Appendix. Referenced in section three, I describe the implementation of and/or adjustment to credibility, transferability, dependability, and confirmability as

evidence of trustworthiness. Finally, I review the strengths and limitations of the study, summarizing key points in section four.

As described in prior sections, I intended to interview and survey staff and management at the education agency to obtain their perspectives regarding organizational downsizing and outsourcing to provide a developed strategic plan to assist in guiding the education agency through its restructuring and planning for future sustainability. During the IRB review process, it was necessary to remove interviews to protect anonymity and remove potential for bias from my working relationship with the education agency staff and management in my capacity as a board member. Due to concerns for anonymity, age, gender, culture, and other identifiable demographics were not obtainable. I did receive approval to proceed with surveying all actively employed staff and management. This study's deliverables are unique, given the education agency's unique structure and situation. It helps fill a gap in existing scientific knowledge with never-explored criteria surrounding a topic that has been extensively studied over the past 40 years.

At the time of gathering survey data for this study, during July 2023, the education agency staff and management were approximately a year into their reorganization and downsizing initiatives. A significant push to complete an outsourcing initiative was completed, and staff were working on troubleshooting some of the transitional aspects that failed or needed repair. Due to these time constraints and the workload, the staff's time to commit to completing the survey was limited. These organizational conditions may have influenced participants' experience and may influence the interpretation of the study results.

Data Collection

I submitted my recruitment invitation to the the education agency staff to participate in the study on July 3rd, 2023, and it closed on July 24th, 2023, sometime after 5pm. The invitation was sent to 45 staff members, this includes 32 non-managerial staff, eight managerial staff, and five senior managers (including the executive director). I chose to invite all staff members, regardless of classification, as long as they were 18 years of age or older and were actively employed at the education agency as previously indicated in earlier sections. The recruitment invitation was sent by Walden student email to all staff and included an invitation to participate in the study with access to the survey link to review the consent form. Staff who were interested in continuing with participation in the study were given instructions to click "continue" in order to provide consent and proceed with the survey. While I had previously planned to use Google Forms to have participants complete the survey, it was not compatible with the formatting and length requirements needed to survey participants appropriately. I selected Formsite (Formsite) as a suitable alternative while following the same parameters described earlier under section three. Each survey consisted of the same heading, introduction, disclosures, open-ended questions, and any Walden University requirements for all respondents. A total of 24 staff members consented to participate in the study and completed the survey.

Table 2

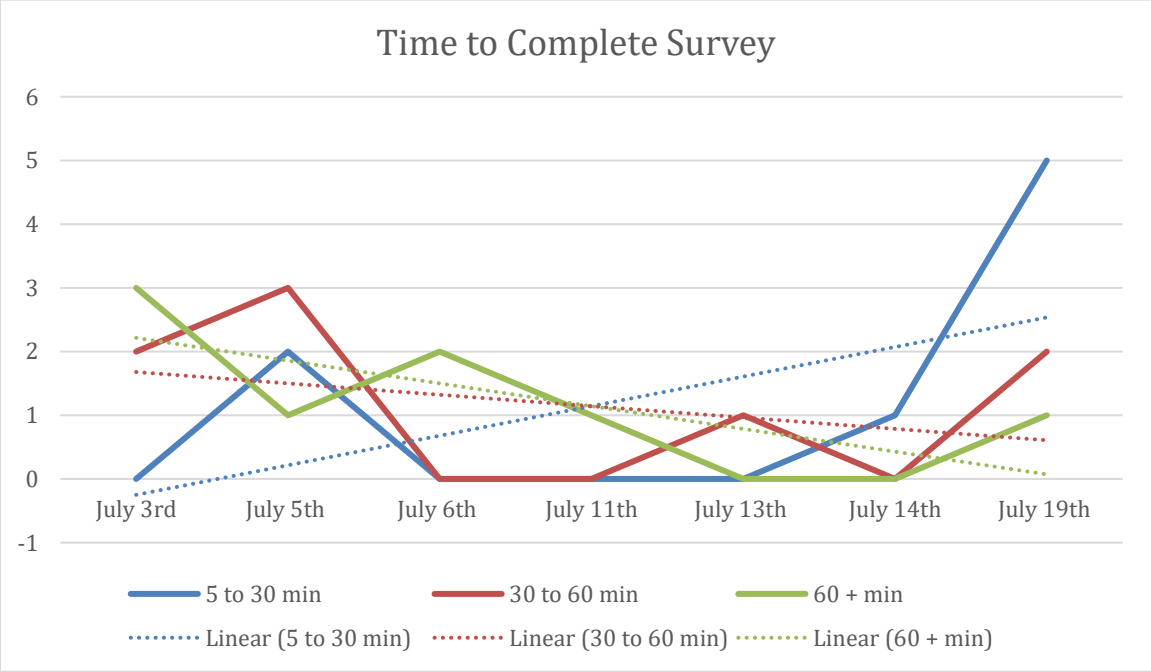
Recruitment Efforts

Staff Title	Number invited	% of staff population
Non-Managerial	32	71%
Managerial	8	18%
Senior Manager	5	11%
Number of staff who consented to participate in the study.	24	53%
Percentage of the staff that participated in the study.		

Participants had unlimited time access to complete their survey once opened, until it closed on July 24th, 2023. Participants completed surveys between 00:07:10 and 02:32:05, the average completion time being 01:56:55. All surveys collected were submitted by participants on one of only seven days in July during the survey collection period in 2023.

Figure 2

Number of Participants to Complete Survey by Time

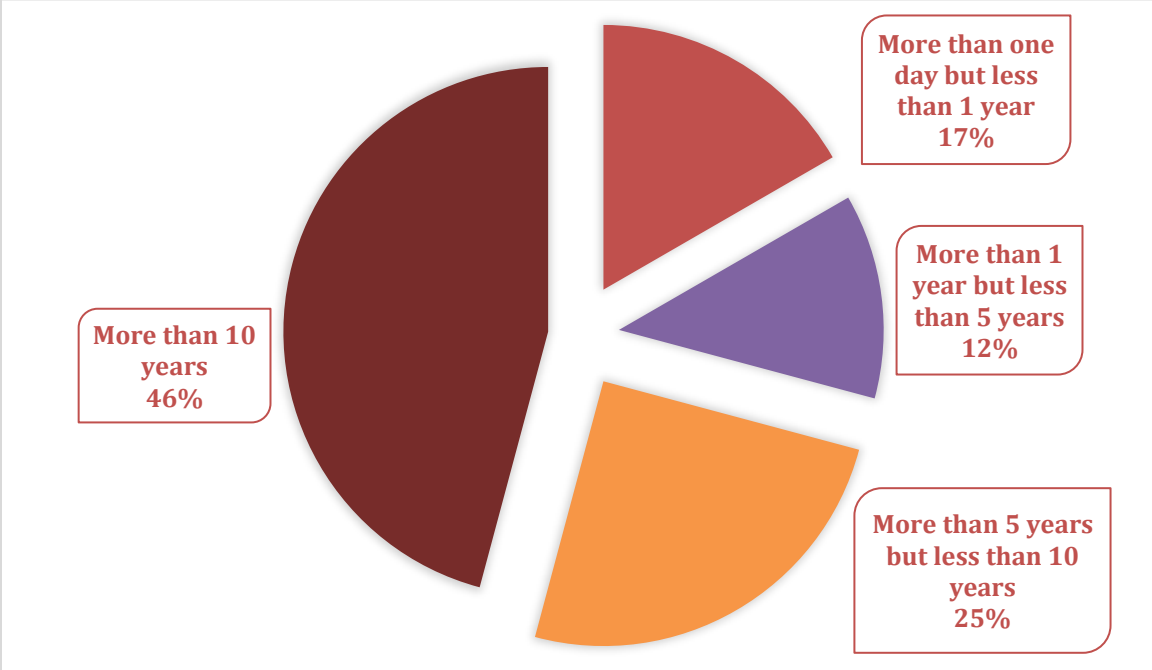


It was worth noting that on July 19th, 2023, I communicated with the Executive Director that I would close the survey on July 24th, 2023. Some of the July 19th survey submissions may have been influenced by the Director reminding staff that I would close the survey in 5 days if they wished to participate. Participants who completed the survey before July 11th spent considerably more time completing the survey than those who submitted later. Surveys completed on July 19th had the most participants complete the survey in 30 minutes or less.

Due to anonymity, age, gender, culture, and other identifiable demographics were not obtainable. However, I surveyed participants about their time of service at the education agency, offering one of four options ranging from less than a year to more than 10 years, to protect participants from providing specific identifiable information. Of the 24 participants, 11 indicated being employed for 10 or more years, six indicated being employed more than 5 years but less than 10 years, three indicated being employed more than a year but less than 5 years, and four indicated being employed more than one day but less than a year.

Figure 3

Respondents' Length of Service



All 24 participants received the same recruitment invitation to participate, the same letter of consent, and the same level of access to the survey. Data were downloaded and collected as an Excel spreadsheet from Formsite, which was stored on a secure flash drive. During the collection period between July 3rd and July 24th, an unusual circumstance occurred during the data collection process. There were two incomplete survey submissions. Due to anonymity, and having received no communication from participants, it is unknown whether these participants had technical difficulties, chose to revoke their participation, or any other circumstances preventing them from completing the survey. Additionally, while each complete submission, including the incomplete surveys, came from unique, individual IP addresses, it is unknown if the two incomplete

surveys were later completed by participants at a home, remote location, or another address than their workstation. Participants were not required or instructed to take the survey at any specific location; it was entirely up to the participant where they completed the survey.

Data Analysis

According to Braun and Clarke (2006), there are two primary means of identifying patterns from data in thematic analysis (TA), inductive and deductive; inductive applies a bottom-up approach that focuses on themes being strongly linked to the data, whereas the deductive applies a top-down approach (pg. 83). I elected to select inductive over deductive as I wanted the autonomy of processing the codes and categories without a pre-existing coding frame, or my own analytic preconceptions. Respondent data in this study were analyzed using an inductive TA step-by-step guide (referred to as phases) as described by Braun and Clarke (2006 and 2022) in Table 3.

Table 3

Phases of Thematic Analysis

Phase		Description of the process
1.	Familiarize yourself with your data:	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.
2.	Generating initial codes:	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.
3.	Searching for themes	Collating codes into potential themes, gathering all data relevant to each potential theme.
4.	Reviewing themes:	Checking if the themes work in relation to the coded extracts (level 1) and the entire data set (level 2), generating a thematic 'map' of the analysis.
5.	Defining and naming themes:	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.
6.	Producing the report:	The final opportunity for analysis. Selection of vivid, compelling examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.

Note. From "Using thematic analysis in psychology," by V. Braun and V. Clarke, 2006, *Qualitative Research in Psychology*, *3*(2), 87. https://doi.org/10.1191/1478088706qp063oa

Phase One

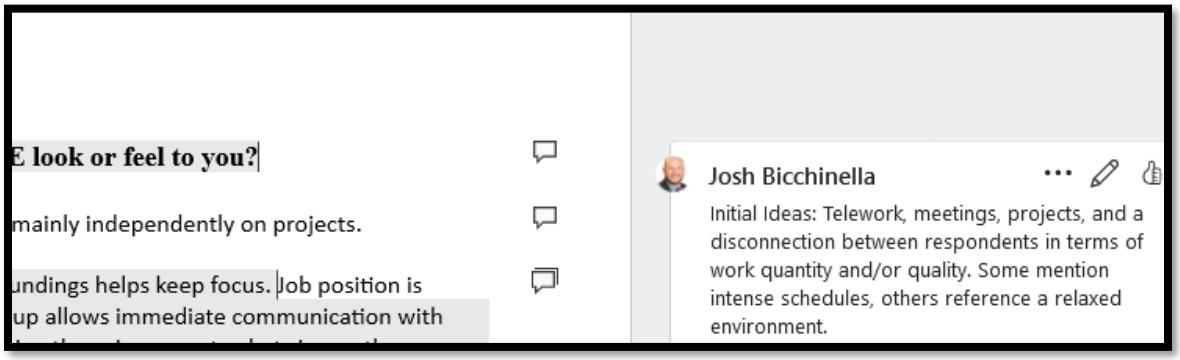
In phase one of the analysis, I began by copying and formatting the downloaded respondent surveys from Formsite (Excel) to another format (Word), improving the visual appearance of the data. Rather than viewing all questions and answers in a large table data set, questions were paired with appropriate answers into individual pages of readable data for coding and analysis. At this stage in the analysis, respondents were given a pseudonym (ex, Respondent A, Respondent B) to ensure data extracts correlated to the appropriate respondent to maintain data integrity.

During the initial read, I focused on familiarizing myself with the data. Reading through everything was time-consuming, but necessary to understand all its aspects. I began making notes for each section of questions with my initial ideas, utilizing the

comment feature in Word to organize and track my thoughts (see Figure 4) and re-reading answers as needed.

Figure 4

Initial Ideas in Respondent Data

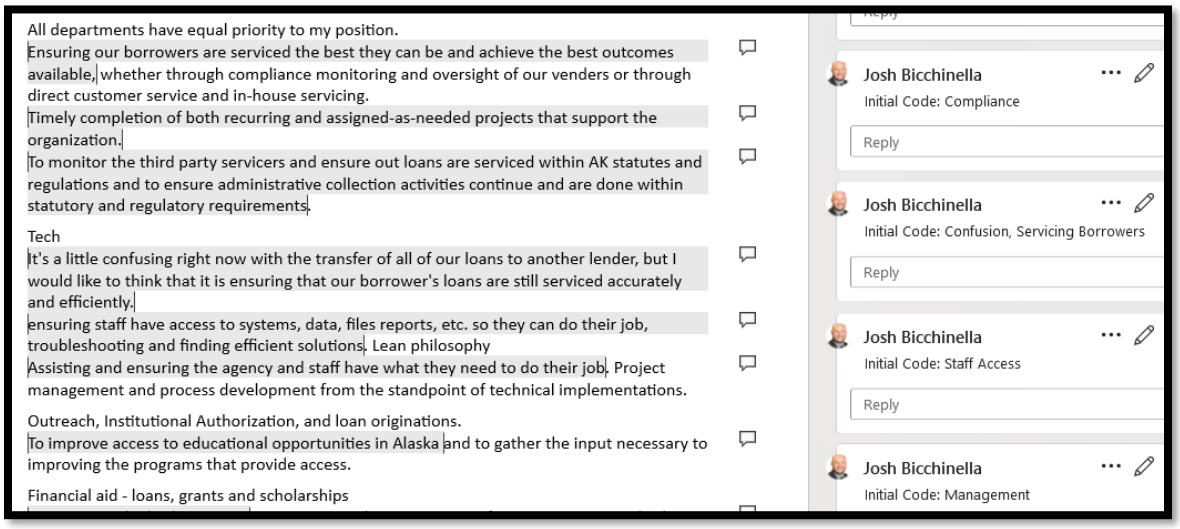


Phase Two

During phase two of the analysis, I revisited my notes and initial ideas surrounding the data acquired in Phase one of reading and familiarization. Upon completing my review, I began producing initial codes from the data extracts (see Figure 5).

Figure 5

Respondent Data During Initial Coding Phase



I followed Braun and Clarke's approach (2006) in identifying codes at a semantic level, which explores explicit or surface-level meanings, rather than an interpretive level, which looks beyond what a respondent has said or written regarding underlying ideas and assumptions. Several coding types or strategies are used in qualitative research (e.g., Saldaña, 2014). I used a descriptive coding method to encapsulate general ideas and concepts. These codes represent interesting or unique respondent answers that I used later to assess the data meaningfully concerning the overall research question.

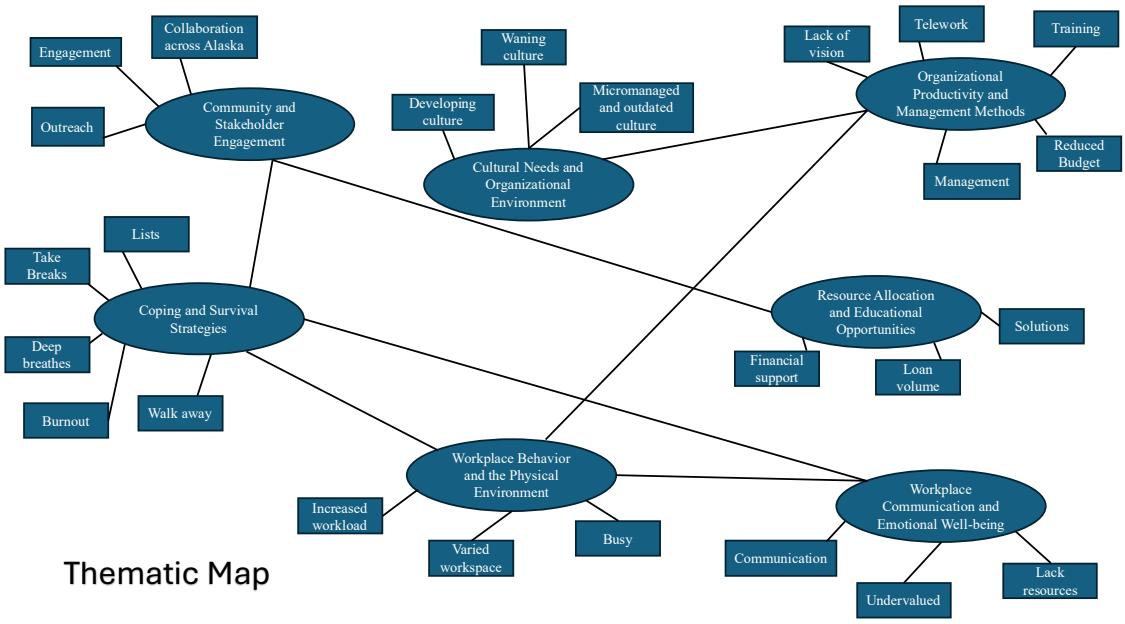
Phase Three

After completing phase two, I began phase three by categorizing data and collating codes into potential themes. During this step, I utilized the initial codes and ideas to begin collating relationships between codes and initial category development to organize and better visualize code data. After categorizing the near 200+ codes into 18

initial categories, themes began to form, and categories began to condense and change where they overlapped or when similarities were found. This phase in the process was lengthy, as some codes fit under multiple categories or themes, whereas others did not seem to fit anywhere. A thematic map of this early stage of the analysis can be seen in Figure 6.

Figure 6

Initial Thematic Map, Showing Seven Main Themes



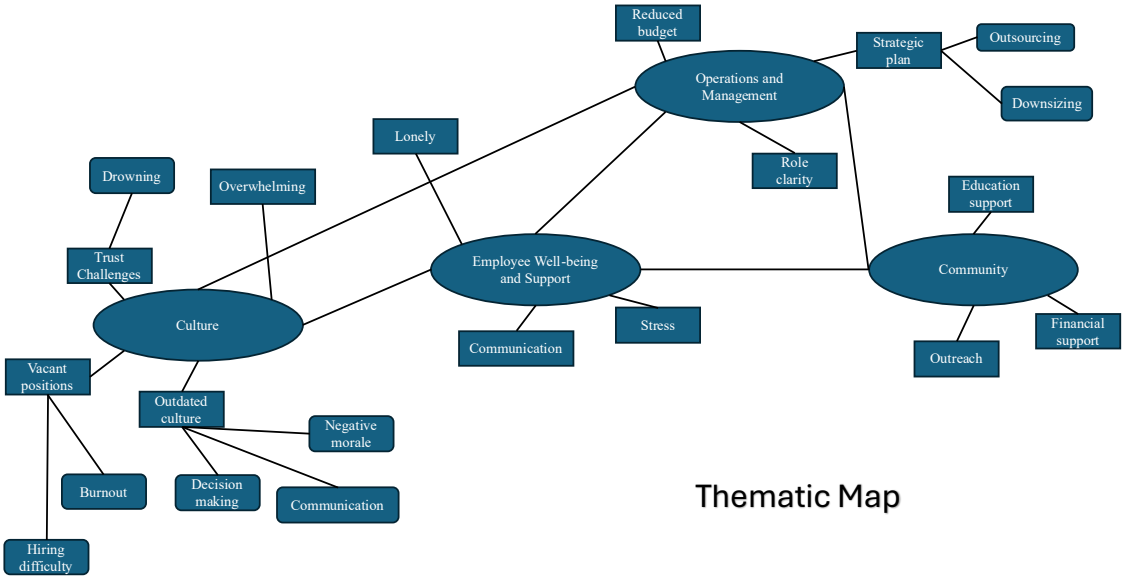
Phase Four

Initially, as referenced in phase three, I had 18 unique categories of coded data that led to my initial seven themes. I began phase four by refining those initial themes, which involved two levels of review and refinement. During level one, I revisited and read all the collated data extracts for each relevant theme and evaluated if they appeared to form a reasonable and rational pattern. Several codes were shifted to other themes or

removed entirely if they did not fit into one of the remaining themes. During the level one review, I reworked my initial seven themes, adjusting and altering data into four remaining overreaching main themes. At this point in the analysis, I created a revised thematic map showing the four themes from the data (see Figure 7). Next, I began a similar process of reviewing the credibility and strength of these four individual themes against the entire data set. Once more, I began by re-reading the data set to determine if the themes align with the data set, and second, to code any new data that might have been missed at the earlier stage. Further thematic map adjustments are made at the beginning of phase five.

Figure 7

Developed Thematic Map, Four Main Themes

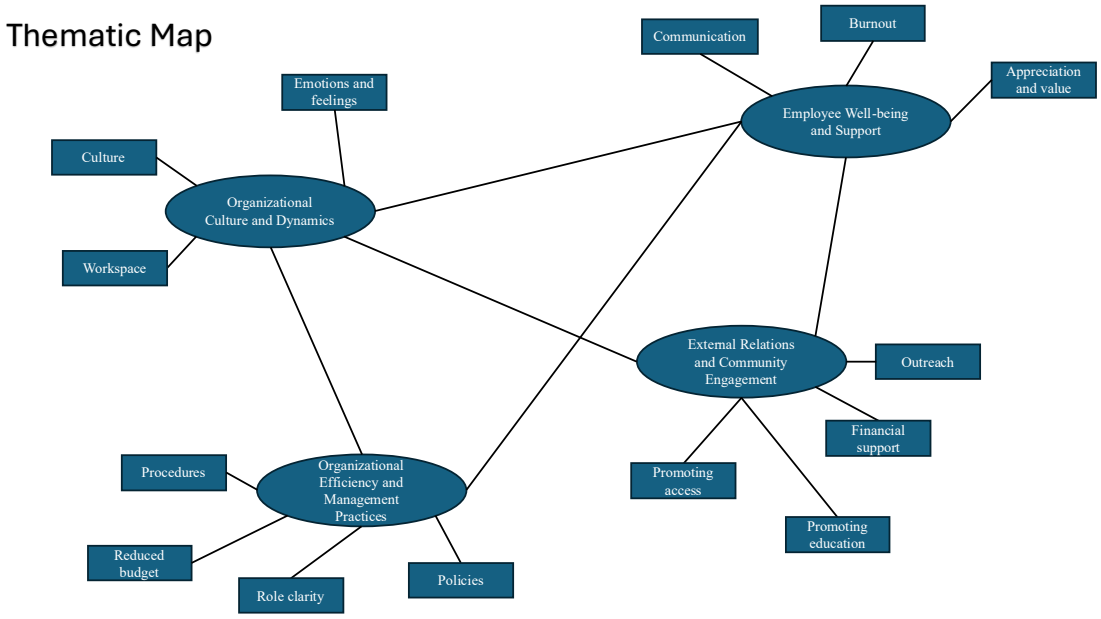


Phase Five

This phase involved the ongoing analysis of each theme, developing the overall story that the analysis tells. During this phase, I further defined and refined the themes that were presented and generated a final thematic map (see Figure 8).

Figure 8

Final Thematic Map, Four Overarching Main Themes



This process included reviewing the data extracts connected to each theme, organizing them into coherent and consistent accounts that support the analytic narrative. Each theme (in this case, four themes) required a detailed analysis of what the data was showing, supported by the extracted data, and how it fits into the broader overall story about the research question. The final chart of codes, categories, and themes described throughout phases one through five is shown in Table 4, below, and Appendix D.

Table 4

Codes, Categories/patterns, and Themes

Code	Categories/Patterns	Themes
Burnout, Stress, Lonely, Supportive team members, Positive relationship, Love, Very supportive relationships, Appreciation and value, Flexible hours, Work-home life balance, Take breaks, Time management, Exercise, Music, Visuals, Communication with supervisor, Communication, Current staff feedback, Positive manager, Challenged and defensive relationships, Friendly co-workers.	Employee Experience	Employee Well-being and Support
Collaboration across Alaska, Communication, Outreach, Community organizations, Engagement, Families, Legislative policymakers, Promoting education, Education support, Financial support, Promoting access, Educational financial resources, Financial compliance	Access and Promotion	External Relations and Community Engagement
Work space, Culture, Decreased productivity, Tenured employees, Rewarding, Alaskan demographics, Competitors, Education Value, Pay, Accept and navigate, Coffee, Communication, Communication with supervisor, Decreased productivity, Deep breathes, Exercise, Emotions or feelings, Lists, Music, Work-home life balance, Walk away, Visuals, Take breaks, Time management, Prioritize tasks, Scheduling, Lack resources, Relax, Reprioritize as needed, Burnout, Cheap labor, Conflicted contributions, Coverage, Difficult, Dismissive, Drowning, Eliminating positions, Hiring difficulty, Increased responsibilities, Increased workload, Instability, Juggling work, Vacant positions, Trust challenges, Lack of upward mobility/progression, Missed opportunities, Negative morale, Overwhelming, Process inconvenience, State connection, Staffing, Reduced budget.	Environment	Organizational Culture and Dynamics
Role clarity, Role evolution, Role uncertainty, Task management, delegation, Policies, Procedures, Compliance, Decision making, Strategic plans, Organizational connection, Reduced budget, Financial support, Lack resources, Financial aid, Funding, Access to existing draft, Staff access, Relevant, Resources, Retention, Reduced budget, Valuable products, Update	Operations, Management, and Leadership	Organizational Efficiency and Management Practices

Phase Six

Phase six involved the final analysis and write-up of the report. The purpose of this phase was to create a compelling and convincing argument to the reader of the merit and validity of the analysis. This report includes data extracts embedded into the analytic narrative to help share the data beyond regurgitating the description of what was collected; it helps to make a compelling argument in relation to the research question. Findings from this thematic analysis are outlined in the section following discrepant cases.

Discrepant Cases

Although survey respondents shared a range of both positive and negative experiences, I found no responses to be inconsistent or contradictory to the emerging themes. As this is the case, no discrepant cases were identified in the data.

Findings

What follows is a detailed narrative of the gathered findings. The primary research question, which examines the perspectives of staff and management concerning the education agency strategies that might be considered to meet its directive to downsize and realign the organization for future growth and sustainability, is addressed by identifying various themes and supporting data extracts. Data extracts, or "quotes," have been taken from the larger collection of survey submissions to support the four overarching themes discussed below. As referenced in earlier sections, all respondents were employed with the education agency at the time of the study, were at least 18 years of age, and consented to participate in this study voluntarily.

Theme 1: Employee Well-being and Support

Employee well-being is a state of comfort, health, and a sense of happiness about one's work. This state is influenced by various workplace factors such as relationships with peers or larger business decisions that impact them and their work (pay, coworkers, job-related satisfactions) and nonwork satisfactions such as social or family life, spirituality, and lastly general health (mental/psychological such as stress, frustration, anxiety, and general physical health) (Nielsen, 2024). When asked to describe their working relationship, several respondents indicated having a positive relationship with

their peers and/or management. Respondent A mentioned, “I have excellent relationships with peers and management.” Similarly, Respondent G mentioned, “Positive, everyone is willing to listen and resolve issues regardless of position title.

Many respondents described feeling comfortable speaking with peers or management about concerns, feeling respected, and that low stress levels allowed for more productivity. For example, Respondent R noted that their relationships were “low stress and very productive.” When asked if respondents felt appreciated and valued in their current role and position, a large majority indicated or communicated a strong sense of appreciation and value in their roles. Respondent H stated, “Yes, appreciation is shown gratuitously.” Respondent L indicated, “Yes, I feel respected and that my voice is heard and listened to.” Most respondents referenced receiving or hearing frequent office kudos, a mention of thanks, or thankfulness from supervisors or senior leaders, and support in their position or efforts within the organization. There is specific mention of the Executive Director and support for their “new” efforts in several aspects of the organization, ranging from employee well-being to organizational directives.

However, not all respondents replied positively; some negative responses were identified and interpreted as indifferent or hostile. For example, Respondent F mentioned “for the most part, it is good,” a similar answer to other respondents, showing potential indifference to the question or their peer/manager. Respondent H noted that “certain senior management members/peers can be abrasive and overbearing at times, making working relationships strained.” Another respondent, Respondent B, similarly stated, “There are some outliers, specifically some peers in other departments that, due to them

having had my position previously, have a tendency to look over my shoulder and act like a supervisor towards me when we are equals and attempt to micromanage me."

Additionally, while teleworking is mentioned positively several times throughout the collected data, responses associated with employee well-being suggest it may strain some of the relationships. Respondent X described, "since we started teleworking, these relationships are not as strong as they once were and are lacking with new staff members." Another respondent, Respondent E, mentioned, "the pandemic has certainly changed this dynamic with more teleworking and not as much face time and time in the office together."

Some respondents indicated feeling undervalued, underpaid, not being appropriately compensated, and in one instance, valued out of necessity. Respondent R described, "I feel appreciated but undervalued and underpaid. Cost of living and inflation have compounded over the years, and our salaries and benefits are no longer competitive, nor do they keep up." Similarly, Respondent A noted that they "feel undervalued. Due to understaffing, I am wearing multiple hats, but do not feel I am being compensated adequately for my responsibilities." Respondent T mentioned "due to years of attrition/outsourcing, every staff member is needed and valued" a view this researcher found somewhat forceful.

Minimal reference to nonwork satisfactions is found in the respondent data. Respondent W and P referenced not bringing work home and separating personal and professional time from one another. Of those that reference nonwork satisfaction areas, there seems to be clear boundaries between work and home life.

General health, the area surrounding mental, psychological (stress, anxiety, fear, etc.), and general physical health are found frequently in respondents' answers across the collected data. Primarily, respondents communicated positively, though negative cases exist. Respondents had various responses when asked about what a typical day at the education agency looks or feels like. Many reference teleworking from home, daily or weekly meetings, or projects (92% of respondents indicated they meet at least weekly, sometimes more). However, several respondents referenced conflicting responses associated with a feeling or emotion tied to their workday. Respondent G mentions "teleworking is relaxing, and full control of surroundings helps keep focus", whereas Respondent P states "boring, we all work at home. I miss the daily interactions with other people." Another response by Respondent X states "busy," whereas Respondent J mentions "pretty relaxed." Given the various response differences for this area, it is possible that the time or date at which the respondent took the survey impacted their feedback based on the workday, project, or timeline they may have been facing.

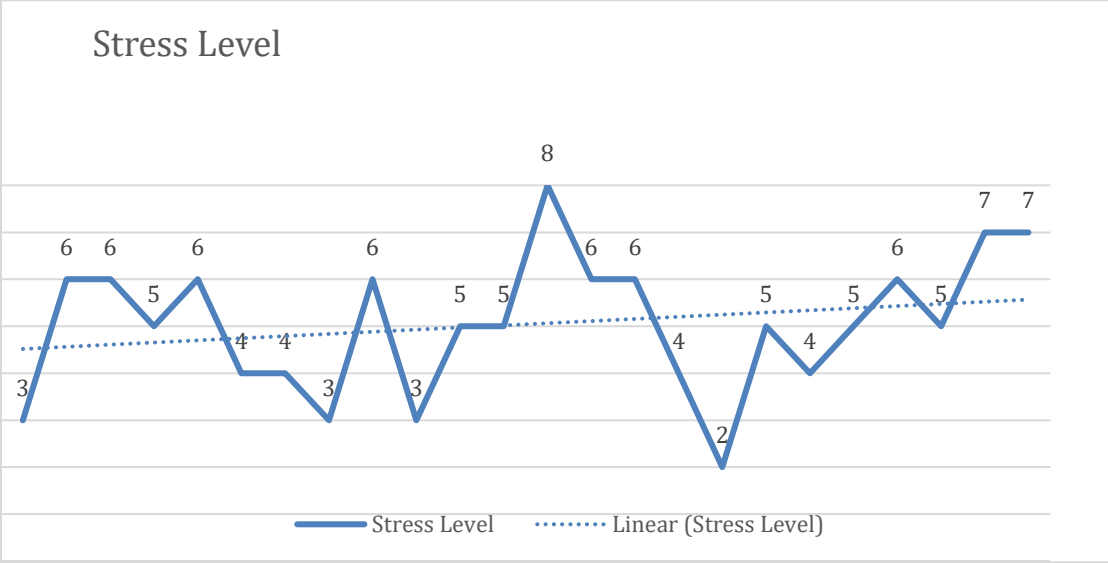
Similarly, when asked about managing stressful situations, responses varied greatly amongst respondents. Respondent Q stated, "not stressed," while others referenced making lists, taking a walk, taking deep breaths, applying other coping strategies to manage stress and anxiety in their work better, or working with others. Many respondents indicated that stress comes and goes based on the projects or workload associated with the time of year, stating they openly discuss these concerns or stresses with their supervisor. Respondent N described "being organized and prioritizing is key. I try to take things one day at a time. A comfortable work environment is helpful, and

taking small breaks to clear my head is always good." Respondent B states "less and less people are left to do more and more work, with everyone now having had to do double and triple responsibilities causing more stress and burnout," when asked about attrition, outsourcing, or downsizing. A majority of respondents mention being "affected," feeling "sad" or "sadness," others "angry," Respondent L notes "yes, sad and angry, stressed, makes roles and responsibilities hard to understand when tasks get divided out." 83% of respondents indicated that they knew someone who had exited the organization due to attrition, outsourcing, or downsizing, and that it had affected them negatively.

While a large majority of respondents mainly answered positively when referencing Employee well-being, a large percentage of respondents felt they do not directly impact decision-making within the organization, 42% answered no. Furthermore, when asked on a scale from 1-8 what they would rate their work in terms of less or more stress, with eight being the highest, respondents averaged a score of 5, as shown in Figure 9. 42% of respondents indicated having a stress level of 6 or higher.

Figure 9

Question: On a scale of 1 to 8, with 8 being the highest, what would you rate your work in terms of less or more stress?



Theme 2: External Relations and Community Engagement

Another theme from the data was that access and engagement appeared to be synonymous with outreach and financial support. Respondent N notes "to promote access to postsecondary education and to provide students the tools and resources to achieve higher education," as the organization's top priority. Respondents repeatedly connected access and education with the organization's outreach or communication efforts with internal and external stakeholders and financial supports (i.e., financial aid, student loans, private loans, funding, grants, etc.) Even though the organization is connecting with community/organizational stakeholders, and reaching out to schools, organizations, and community members/leaders, respondents communicated it was a top departmental priority, organizational priority, and one of the biggest concerns the organization is facing

and is underutilizing. For example, Respondent O mentioned "our stakeholders across Alaska" as the most significant asset the organization is underutilizing. Similarly, Respondent U mentioned "partners/stakeholders," Respondent I stated, "direct person-to-person outreach to rural communities, which requires travel." Primary stakeholders identified by respondents are shown in Table 5.

Table 5

Primary Stakeholders

Students	State of Alaska
Alaskan citizens	Families
Potential students	Schools
School districts	Postsecondary institutions
Education providers	Legislature
Education policymakers	Industry/Workforce
Job training centers	

Closely connected to outreach is financial support. Respondents referenced loans, financial support, student loans, financial access, financial aid, cost, funding, servicing borrowers, grants, scholarships, costs, and a few additional variations to suggest an organizational need to help those interested in accessing and pursuing education in Alaska. Financial terms are referenced dozens of times throughout the respondent feedback. When asked what the biggest concern the education agency faces, respondents provided various answers ranging from internal practices and procedures to an unclear vision of services. However, the most frequently referenced area of concern surrounded financial support. Respondent C noted, "the education agency's biggest concern is informing Alaskans about higher education opportunities and how to prepare for and pay for them." Other Respondents described similar concerns with loan volume, budget games with the Governors office and state legislators, finding students through outreach

to help with student loans, and as Respondent X mentions “connecting with our target customers (AK students) to provide our loans and inform them about APS requirements before they graduate from high school.” Respondents in another survey section mentioned “financial aid- loans, grants, and scholarships” as their department’s top priority. Other respondents described the importance of financial compliance and meeting state, federal, and regulatory board requirements.

Respondents spoke frequently about promoting access and education, and in several instances, the two together throughout the survey data were often connected to outreach and/or financial support. Given the vast size of Alaska (almost three times the size of Texas), connecting with others, especially in remote places (as referenced by respondents), can be difficult. Even with technological advancements and growing cellular and Wi-Fi expansion, many towns, cities, and rural communities do not yet have adequate access to these resources. Respondent I described “direct person-to-person outreach to rural communities, which requires travel,” as one of the most significant assets being underutilized in the organization today. Additionally, primary promotion methods have changed rapidly in the past few years with the growth of social media and other micro/macro methods surrounding promotion. Respondent G indicated “providing relevant information to stakeholders, educators, and potential customers about the education agency’s products/services, and educational materials to inform about the benefits/current state of higher education in Alaska,” as their department’s top priority. Respondents frequently referenced a desire to promote towards “Alaskans,” “students,” “families,” and other groups on having access to and the importance to postsecondary

education through various means, including the education agency. Additionally, respondents mentioned the importance of promoting education due to changes in our social structures and the current political climate. Respondent G described what they felt was the organization's most significant concern: "the structure of education itself (and in turn higher education). Education across the country has degraded, and the value of higher education is not what it used to be for many disciplines. With unchecked rises in the cost to students, the education agency's produce may become less and less relevant."

Theme 3: Organizational Culture and Dynamics

Organizational culture and dynamics are closely related to an organization's performance. Organizational dynamics help a company strengthen relationships internally and externally, whereas culture establishes and shares the organization's shared beliefs, norms, and values. Respondents spoke about conflicting cultural and organizational dynamic differences in the workplace. Many positive responses identified the culture as "productive" or "helpful and positive." However, negative examples were present. Three respondents mentioned a struggling culture; Respondent A described it as "once vibrant, now waning, but kept alive by veteran employees." Another respondent, P, felt the organization is "floundering for connection." Respondent O stated the organization is "holding on to the past with a need to leap forward." When asked how they would describe the culture, they responded, "I am not sure how to answer this question."

The organization's workspace reflects both culture and dynamics. Is it productive? Are outcomes positive? Do people enjoy the space? Do they want to come to

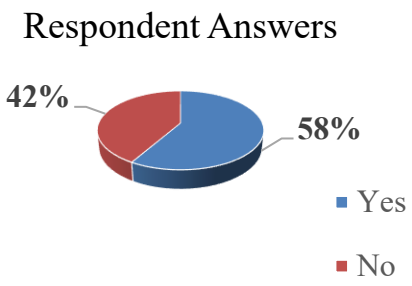
work? A lot can be gathered from individuals about their space. Respondents described their workspace in various ways; some responded very technically, others emotionally, and some in as few as one or two words. Respondent Q responded “ok,” and Respondent H stated, “it’s fine,” when asked about their workspace. Interestingly, many respondents positively reference teleworking while also referencing missing office interactions. Though not all comments about telework appear favorable, Respondent P mentioned, “it’s a very lonely corner in our house.” Another, Respondent B mentioned “small, lol. My primary workspace is a desk in my living room. My workspace in the office is now a 3 ft wide cubby with barely enough space for my monitors, no space for my drawers, and not really enough leg room.” In this case, the respondent seems to reference telework negatively, sarcastically, and similarly, the office. Others mentioned the ongoing movements of the organization during downsizing being difficult and “distracting” while the construction and the move are being completed. Respondent F mentions, “My cubicle is nice. However, there is a lot of construction going on all around us, and it is very distracting and causes some issues while working in an office.” Interestingly, Respondent T was the only one to refer workspace being connected to how they defined downsizing mentioning “adjust staffing/workspace to optimum level to effectively/efficiently carryout agencies responsibilities/mission.”

Respondents frequently referenced their emotions or feelings when answering survey questions about the organization. Over 20 times, respondents used the word “feel” followed by an emotion to describe their emotions in multiple areas of the collected data. The word feel was used to describe something negative in eight of the twenty-four

instances. One negative response came from a respondent when asked if they knew someone who had exited the organization due to attrition, outsourcing, or downsizing, and how it affected them. Respondent N firmly stated, “Yes, it has been difficult and challenging in many ways. The workload and stress levels are at an all-time high. At times, I feel a sense of drowning and burnout.” Another case came when respondents were asked if they felt appreciated or valued in their role or position. Respondent A mentioned, “I feel undervalued. Due to understaffing, I am wearing multiple hats, but don’t feel I’m being compensated adequately for my responsibilities.” The remaining sixteen instances were found positive or indifferent, such as when Respondent S noted, “The education agency feels like an extended family, the leadership is great.” Figure 11 shows respondents ' responses on whether or not they felt they had a direct impact on decision-making.

Figure 10

Question: Do you feel you directly impact decision-making?



Theme 4: Organizational Efficiency and Management Practices

The final theme identified encompasses how the organization runs and operates under existing management practices. Respondents spoke at length about procedures, role

clarity challenges, and policies affecting their work while operating with a reduced budget. Respondent F spoke about "not having accurate procedures on how to complete tasks for new staff, older staff who have been here for years and years not allowing things to change (having the, it has always been this way mentality) and getting documents out in a timely manner if you have to wait for them to be reviewed." Other processes, such as loan servicing, the strategic plan, and communication, are also affected. Respondent M mentioned, "I do feel that conversations sometimes take less time and clear up more confusion quicker than Teams chats," referencing talking in person, versus remotely, a challenge sometimes faced when teleworking. Respondent M also mentioned a good deal of confusion with the strategic plan at the education agency stating "it resulted in a fair bit of confusion for me regarding my direction and concerns about overlap." Another respondent references confusion around loan transfers, stating "it's a little confusing right now with the transfer of all of our loans to another lender," a product of the outsourcing and downsizing initiatives in place, without a strategic plan.

Respondents referenced their role a total of 22 times in the collected data. At the same time, many referenced their role and work positively or negatively. When asked if they had a clear understanding of their role and direct impact on the organization, Respondent H stated, "not particularly," and Respondent P mentioned, "not really, as I said before, we are still attempting to determine job duties at this time." Others went on to mention how their roles are constantly changing, and that they have to seek out their supervisor when unsure of tasks or responsibilities. One respondent went as far as to connect staff positions/roles in their definition of downsizing, stating "staff reductions

due to either attrition or position/role elimination." A further look into the survey data shows negative responses regarding strategic plans associated with employee/staff roles. Respondent N mentions, "Yes, the education agency has a strategic plan, and all employees played a role in the early development,". In contrast, other respondents, like Respondent F, mention "no, or at least I am not aware of one. It is kind of frustrating not knowing what is going on a lot of the time, so sure it could benefit from having one." Confusion and contradiction are found regularly throughout the respondent data surrounding organizational efficiency and management practices.

Several times, a restrictive and reduced budget has been mentioned as affecting the policies and procedures respondents seem to struggle with. Respondent H noted "outdated practices and policies" as one of the biggest concerns with the organization. Respondent R referenced the budget issues, describing "budget games with the Governor and legislature limiting our ability to function as a agency" as its most significant concern. These areas appear to be affecting management practices, ranging from workspace, location, policy, procedures, and planning, to name a few, in association with the organization's outsourcing and downsizing initiatives. One respondent referenced its effect on the entire organization, with staff choosing to leave. Respondent E said, "There have been a number of staff who have retired or chosen to leave due to the stress over the past few years of a high workload with outsourcing. This has affected the entire organization, causing increased workloads and difficulty hiring while trying to manage a reduced budget."

Interpretation of the Findings

This study aimed to explore and identify the perspectives of the education agency staff and management regarding organizational downsizing and outsourcing; and to develop a strategic plan for its restructure and future sustainability. Following a thorough data review, themes include: Employee Well-being and Support, External Relations and Community Engagement, Organizational Culture and Dynamics, and Organizational Efficiency and Management Practices. The research question used to guide this qualitative research study was:

RQ: What are the perspectives of staff and management concerning the education agency strategies that might be considered to meet its directive to downsize and realign the organization for future growth and sustainability?

Evidence from the survey data suggests that employee well-being and support have been negatively affected by downsizing, with many respondents indicating that attrition and outsourcing have significantly increased their stress and workload. For instance, several respondents (83%) reported feeling overwhelmed, with one commenting "I feel a sense of drowning and burnout," while another shared "My unit shrunk from four staff to one (me)… I have assumed the duties of the three exited staff." These responses reflect widespread concerns about increased pressure and the strain on the remaining staff.

Further survey data highlights the importance of external relations, outreach, and community engagement. Respondents referenced eleven unique groups of individuals/organizations in the community referenced in Figure 10, where respondents

communicate a need for improved communication, interaction, and connectedness. For example, one respondent commented, "We have multiple connections to K-12 schools, but do not do enough outreach at these levels to promote postsecondary education." In contrast, another respondent commented on the need to "build collaborations across the whole state." The organization could benefit from this feedback by gathering internal and external stakeholder information to help identify and align the organization's approach to marketing, social media, and communication with community stakeholders.

Further survey data revealed how respondents perceived the organizational culture and dynamics at the education agency, with some describing it as "collaborative, supportive, and rewarding," while others mentioned it as "floundering for connection." These diverse perceptions suggest that a disconnect within the organization may hinder cohesive teamwork and morale. Some employees felt that the frequent changes associated with or resulting from downsizing and the lack of clarity around procedures and policies have contributed to an overall sense of confusion and disengagement.

When asked about how well respondents understood the mission and vision of the education agency, respondents rated their comprehension relatively high, with averages of 6.33 out of 8 for the mission and 6.66 out of 8 for the vision. However, negative responses were evident, with 17% of respondents indicating the organization was not fulfilling its mission. In comparison, 83% of respondents reported attending many meetings that were not productive or helpful, further highlighting the misalignment between the organization's strategic goals and daily operations.

These areas of misalignment between the organizational culture and strategic framework underscore the need for further review and adjustment of the organization's mission, vision, and values. This strategic realignment should aim to create more transparent communication around these fundamental areas to ensure they are better understood and embraced by all employees. Additionally, by addressing some of the role clarity and organizational policy confusion, the organization can help alleviate the confusion and stress experienced by staff to foster a more cohesive and aligned culture.

Many respondents reported a lack of clarity surrounding policies and procedures, and confusion at various levels regarding the organization's strategic direction, particularly regarding the post-outsourcing operation. The need for a coherent strategic plan is evident from the survey data, which indicates that the education agency may benefit from a review of its strategic framework, including an explicit redefinition of its mission and vision based on respondent feedback. Establishing clear, concise communication about the organization's goals, strategies, and vision for the future would improve employee morale and help align the efforts across departments, improving organizational efficiency and reducing ambiguity.

The organization has struggled to properly execute downsizing initiatives in a manner that respondents could respond positively to (Appelbaum et al., 1997; Armstrong-Stassen & Schlosser, 2008; Frone & Blais, 2020; Tsai & Yen, 2020;). Several references to negative feelings and concerns with organizational practices found on occupational survivors could be further explored under David Noer's work in Healing the Wounds: Overcoming the Trauma of Layoffs and Revitalizing Downsizing Organizations

(pg. 90-3), surrounding job insecurity, unfairness, anxiety, and dissatisfaction described through surface level emotions and feelings. Should further analysis of this study take a deductive approach with a latent level of analysis, additional layers of non-surface level codes and themes could be found more congruent with Noer's and other researchers' work.

Deliverables and Recommendations

This professional administrative research study aimed to collect and analyze comprehensive data from staff, managers, and senior managers at the education agency to deliver an executive summary or strategic plan that addresses the learned perspectives concerning organizational downsizing and outsourcing. As referenced earlier in section two, five components of a strategic plan were addressed including: gathering internal (company) and external (micro and macro factors outside the organization) stakeholder information, organizational analysis (PEST and/or SWOT), development of strategic framework (mission, vision, values, etc.), implementation of developed plan, and regularly scheduled review periods. The deliverable titled Executive Summary is under Appendix C.

By implementing appropriate solutions, the organization could address the problem and help itself by decreasing unnecessary spending. However, the organizational leadership must take responsibility for implementing practical solutions to save the business valuable time and money. Based on the insights derived from respondent data regarding the organization's current policies, procedures, and initiatives related to outsourcing and downsizing, the following recommended solutions have been crafted to

address the issues identified by the client organization. The Executive Summary in Appendix C expands on these potential solutions in greater detail.

Recommended Solutions

Gather Stakeholder Information

First, it is recommended that senior managers understand the perspectives and expectations of employees, their teams, and external stakeholders such as customers, suppliers, and competitors. Recommended methods include surveys, interviews, and/or focus groups. This provided valuable insight and understanding into the various perceptions of the agency and areas potentially not being considered for improvement or implementation.

Conduct an Organizational Analysis

Second, the organization should complete a SWOT, PEST, or both analyses to visually represent the organization's position (strengths, weaknesses, opportunities, and threats or political, economic, social, and technological).

Revise or Develop the Strategic Framework

Third, the organization needs to redefine or better communicate the organization's mission, vision, and values based on respondent feedback. There are clear areas of confusion, misunderstanding, and misalignment. This aims to define the organization's fundamental purpose, outline long-term goals, provide guiding principles of ethical standards, and organize and establish the organizational culture.

Implement the Developed Plan

Fourth, by establishing and implementing a developed plan, senior leaders can guide strategic initiatives and implement change management when appropriate or necessary. Strategic initiatives include action plans, resource allocation, timelines, and responsibility assignments. When needed, senior leaders would utilize change management practices to ensure the communication strategy keeps stakeholders engaged and informed, equipping staff through training programs, monitoring progress, and adjusting as needed.

Schedule Regular Review Periods

Lastly, the organization could benefit from scheduling regular review periods with performance metrics, review process, and adaptation and refinement practices. Key Performance Indicators (KPIs) allow an organization to assess and evaluate key areas of operation, such as financial initiatives, operational goals, and strategies. The review process would benefit from tracking and incorporating stakeholder feedback into continuous improvement processes while assessing progress and recalibrating strategies as needed. Adaptation and refinement give the organization some agility to pivot and adjust as the environment changes, allowing for continuous improvement while refining strategies based on performance data and stakeholder feedback.

By crafting, implementing, and reviewing a developed plan, the organization can implement a cost reduction initiative while maintaining goals and initiatives to ensure organizational growth and future sustainability.

Recommendations for Future Research

The research findings suggest that more investigation is needed to explore the phenomenon of organizational outsourcing and downsizing. This research study was conducted with an inductive approach and a semantic theme with a public organization that works with higher education in Alaska. Future research on outsourcing and downsizing from external states, agencies, and organizations may be beneficial in supporting or altering best practices and support services for the education agency staff. This study focused solely on the experiences of the education agency staff and management. Future research focusing on other public agencies associated with higher education outsourcing and downsizing in Alaska may bring a more comprehensive understanding of the population's experiences.

In addition, the study focuses exclusively on staff perceptions. Future research might include stakeholder data from students, families, schools, or other agencies associated with the effects of outsourcing and downsizing on the agency. Many respondents spoke openly about concerns about access to and promotion of higher education resources for Alaskan students and their families. Future studies that seek to identify or explore access to support services within these areas could be beneficial in addressing some of these concerns.

Evidence of Trustworthiness

As mentioned in Chapter 3, four measures (criteria) were established to maintain the integrity and evidence of trustworthiness: credibility, transferability, dependability, and confirmability as supported by Maxwell (2012) and Creswell (2003, 2007). What

follows is a description of how I used these criteria to ensure the integrity of the collected evidence in this study.

Credibility

Initially, I planned to conduct surveys and interviews to gather data for source triangulation. However, as mentioned earlier in section four, only survey data was approved by the IRB to pursue for collection due to anonymity concerns. To ensure credibility, I utilized reflective journaling. I outlined my thoughts, ideas, and feelings alongside my coding process to make my biases explicit as I evaluated and conducted my data analysis (Ortlipp, 2008). This was further supported by the intense data analysis procedures I applied and followed to ensure a semantic, inductive approach to analysis was applied. Further, reflexivity practices were implemented to increase credibility and confirmability as described in the subsection below.

Transferability

According to Lincoln & Guba (1985), a study's transferability and fittingness are a function of similarity between contexts or settings with other participants (pp. 40-43 & 123-124). Elo et. al, (2014) goes on to further support that in order to gather credible data, different sampling methods may be necessary in new or differing studies (para. 13). I provided an exhaustive description of the data collection and analysis along with the study's findings, including a representative sample of staff, in alignment with this process. As referenced in section 3, results have been generalized to allow transferability to similar-sized organizations, and types in and outside of Alaska. Some limitations/restrictions to generalizability are unavoidable. For example, some data

specifically references Alaska, and Alaskan(s) specific to the state. However, transferability is still possible should a similarity between contexts or settings occur (ex, Alaska and Russia are both in the Arctic). When generalizing the findings of this study, the setting, participants, and unique experiences shared should be considered. Surveyed respondents comprised a diverse and experienced group of actively employed staff ranging from new hires to individuals with ten-plus years' experience with the organization. The gathered themes, data collection, and analysis structure may provide insights to other agencies and organizations. The transferability of the study may be limited because of the sample size, demographics, and/or location.

Dependability

Initially, I intended to utilize an outside researcher to conduct an inquiry audit to ensure the interview and transcribed data dependability. However, as multiple data sets, including the collection of interviews, were not possible, I utilized an audit trail to ensure dependability. Each phase of the data collection and analysis methods used to collect, analyze, and interpret data was dependable. Every step, process, and procedure with participants/respondents, the client, and each phase of analysis are outlined in great detail. This includes recruitment invitations, consent forms, a letter of cooperation, an outline of survey questions, and secured data storage.

Confirmability

Confirmability establishes that the interpretations and findings of the study are based on the participants' data and reduces researcher bias. According to Lincoln & Guba (1985), an audit trail (as referenced above) helps an inquiry auditor establish

confirmability (pg. 318). Additionally, reflexivity and/or a reflexive journal can be important in improving ethical standards about research and researchers placing themselves and their efforts under scrutiny while acknowledging ethical dilemmas within the research process (Lincoln & Guba, 1985; Mortari, 2015). I used reflective journaling and an audit trail throughout the study to identify and protect data from my biases. During initial coding and later phases of the analysis, I recorded my thoughts, opinions, and feelings and why I made certain decisions. I also utilized a reflexivity approach throughout the process to ensure ethical stances towards this research study and confirmability.

Strengths and Limitations of the Study

This study had several strengths, particularly in the depth of analysis and use of qualitative collection methods. Survey data allowed for a comprehensive understanding of staff perceptions, while the thematic analysis provided insight into the organizational dynamics at the education agency. However, there were also limitations to consider. First, subjectivity inherent in qualitative research could lead to differing interpretations of data. While I made every effort to ensure transparency in the data collection and analysis through an audit trail and reflective journaling, another researcher might interpret the same data differently. This was a common challenge in qualitative research, as Braun and Clarke (2006) noted. However, I have worked to minimize bias through rigorous documentation of my thought process and analysis steps.

Another limitation of the study is the role of the researcher. I have worked with the client organization for years and was the Vice-Chair of the Board. Researcher bias,

which refers to my perspectives and opinions, can occur if left unchecked and inadvertently influence the results of the study. I believe I have addressed this by utilizing reflective journaling, completing an audit trail, and actively thinking about and being aware of my personal bias and how it may affect the results of my study.

Qualitative data analysis in this study involved coding. As described in earlier sections, the coding process was a timely and lengthy process, which Braun and Clarke (2006) referenced as an unending process due to the complexity and subjectivity of dealing with ambiguous and contradicting data (pp. 79-86). Researchers can code, recode, and repeat the process unendingly, finding new or adjusted themes based on perception, understanding, comprehension, context, and other factors. In the case of this study, I feel I have adequately coded the collected data so that other researchers could interpret and understand my conclusions with the subjective nature of qualitative research.

Another potential limitation of the study surrounds non-respondent and respondent participation in the study. The Hawthorne effect described how an individual's behavior can change when they perceive that they may be treated differently from others (Hanna, 2023). While participation in the study was anonymous, participants may have been placed in uncomfortable positions this researcher is unaware of if asked by others in the organization if they participated, or if confronted by a senior manager. It is my hope that no one was subject to this type of effect. I believe my recruitment invitation and consent forms addressed the voluntary nature of the study, risks and

benefits of being in the study, and provided reassurance of their privacy and assurances to their position being protected whether they participated or not.

Finally, generalizability and replicability are additional weaknesses/limitations of the study. Qualitative research focuses on in-depth and rich analysis with thick descriptions of data. While context and setting similarities might be transferable, they may not be generalizable to a larger population of agencies or organizations. Qualitative research depends on context, specific case studies, and variables that make repeating the study difficult, even impossible to recreate in the same setting/variables. Additionally, each researcher's interpretation may differ because of the abovementioned subjectivity. While this does not mean that one researcher or the other is necessarily bad, it is a weakness of qualitative research in terms of being able to replicate.

Summary

In this section, I presented results and recommendations using themes gathered from a thematic analysis of respondents' survey data, providing insight into the outsourcing and downsizing phenomenon at the education agency. I reviewed the six phases of my data analysis process, supported by Braun and Clarke (2006 and 2022). Findings included four main themes: employee well-being and support, external relations and community engagement, organizational culture and dynamics, and organizational efficiency and management practices. The themes and data extracts from respondents serve as a helpful guide to how the organization and others can develop strategies for cost-saving initiatives with a developed strategic plan. An interpretation of findings led to the client deliverable and recommended solutions for the organization and future

research. Evidence of trustworthiness is reviewed, including four key areas of credibility, transferability, dependability, and confirmability, followed by the strengths and limitations of the study. Section five addressed the dissemination plan to the client and participants of the study, a review of applicability to how the outcomes and deliverables apply to a broader audience, impact for social change, and conclusions.

Section 5: Dissemination Plan and Conclusion

Dissemination Plan

Once approved to do so by my committee, I planned to disseminate an executive summary of my findings/report to the leaders of the client organization (i.e., the Executive Director) and participants originally asked to participate in the study (i.e., the staff list received earlier in the study). The executive summary included key findings, recommendations, and forecasted outcomes surrounding the client organization's problem, which this study addresses.

Applicability to a Broader Audience

While the purpose of this study was focused on the education agency the insights uncovered about the challenges and potential solutions related to outsourcing and downsizing were a widely relevant and highly sought-after topic of public and private organizations facing similar challenges. By applying our findings, organizations could have improved their approach to restricting and enhancing engagement in their workforce and possibly ensure that cost-saving measures do not compromise the quality of services to their organization's long-term health and stability. For instance, a municipal government facing pressures to downsize, outsource, or disband may benefit from the insights gained in our study. By applying the best practices outlined in the executive summary for managing outsourcing and downsizing transitions that focus on employee engagement, and other focused solutions, agencies could have minimized negative impacts on the local workforce, benefiting that community and potentially others.

Impact on Social Change

This study's solutions to outsourcing and downsizing in public agencies held significant potential for positive social change, particularly in the areas that affect organizational decisions on employee well-being and community needs/outcomes. Often, public agencies play a critical role in providing needed and essential services, and when affected by downsizing or outsourcing, which often leads to job loss, reduced services, or instability within an organization, it can exacerbate disparities in access to vital resources, information, and services, especially for vulnerable populations. The study contributes to mitigating negative consequences for workers and communities by identifying solutions for managing these challenges. Given this organization's unique position, implementing and adopting a successful strategic plan could have benefited Alaskan residents, the employment workforce, families, and other public agencies. With a sustainable organization built to grow, Alaskan residents could have more affordable options to pursue postsecondary education in the future. Additionally, as the workforce demands continue to change, having the continued support of the education agency to provide access to necessary skills or trade opportunities are essential for Alaskans finding gainful employment, developing a positive social identity, and contributing to maintaining a stable family (Serriere & Mitra, 2011; U.S. Dept. of Education, 2020). Helping organizations adopt thoughtful, transparent, and equitable strategies helps reduce job insecurities and improves quality employment opportunities that support broader social determinants of health, such as economic stability and education. Ultimately, the findings could promote a healthier workforce, strengthen community resilience, and reduce

inequalities while aligning with efforts to address root causes of disparities and create more equitable and sustainable social systems.

Conclusion

Organizational downsizing and outsourcing, a pervasive mechanism of modern post-20th century employment practices, are two key concepts that organizations may explore to affect a wide range of differences in both use and application with the desired goal of cost reduction within an organization public or private (Cascio, 2009; Day et al., 2012; McKinley et al., 1995). The education agency faced challenges in implementing cost reduction initiatives to reduce personnel while outsourcing work functions and positions without a strategic plan to meet its objective to remain sustainable for public service. This study aimed to explore and identify the various perspectives of the education agency staff and management regarding these two key concepts (downsizing and outsourcing) and develop a strategic plan for its restructuring and future sustainability. Findings from staff and management perspectives were found in Section 4, which resulted in four key themes based on my use of Braun and Clarke's (2006) inductive thematic analysis. These four themes include employee well-being and support; external relations and community engagement; organizational culture and dynamics; and organizational efficiency and management practices, which are the groundwork for my client deliverable. The executive summary (i.e., client deliverable) outlined in Appendix C summarized my recommendations and potential solutions to address the client organization's concerns associated with outsourcing and downsizing to realign the organization for future growth and sustainability.

When reviewing the literature surrounding this topic, a common theme was found to help improve cost reduction efforts for organizations whether public or private, in each scenario, a reference to the implementation and/or continuation of a strategic plan was found to have a significant and positive impact across international settings (Akinyele & Fasogbon, 2010; George et al., 2019). These strategic plans vary based on organizational need, internal/external factors, and structural differences. While strategic plans could have had any number of components based on these factors, I focused this study on five key components commonly found amongst various examples which included stakeholder information, organizational analysis, strategic framework development, implementation of a developed plan, and regularly scheduled review periods (Beiko et al., 2018; Johnsen, 2016; Lindstrom, 2000; Porter, 1980). These areas are touched on further in Section 4 when visiting deliverables and recommendations.

There were many limitations to this exploratory qualitative case study. First, as qualitative research requires researchers to interpret subjectively, another researcher may examine the text and find or identify different concepts or themes from my own. Second, I have worked with this agency in a close capacity for many years, and researcher bias may have inadvertently influenced the study results. However, I believe I have adequately addressed those concerns utilizing reflective journaling while completing an audit trail. Another limitation referenced in Section 4 is the coding process, which is a lengthy process that can be repeated with an unending process of finding new or adjusted themes based on several factors (Braun & Clarke, 2006). A more concerning limitation of the study involves the Hawthorne effect, which describes how individuals' behavior may

change if they perceive that they may be treated differently from others (Hanna, 2023). While I believe I have done well to provide reassurance of privacy and assurances to their positions being protected, whether they participated or not, it is a potential limitation of the study. The generalizability and ability to replicate this study is also limited as it may not be transferable to larger populations, agencies, or organizations. Finally, each researcher's interpretation may differ because of the abovementioned subjectivity. While this does not necessarily mean that one researcher or the other is wrong; rather, it is a weakness of qualitative research in terms of being able to replicate.

The findings indicated that a majority of respondents (83%) associated attrition, outsourcing, or downsizing negatively, or that it affected them negatively. The study evidenced that respondents felt that workload levels and stress were at an all-time high. The findings also highlighted how respondents felt improvements were needed in external relations, outreach, and engaging groups and people in the community. Respondents largely commented (83%) that meetings were often or not beneficial to the organization, and there were also negative responses on whether it was fulfilling its mission, with 17% indicating that it was not. Evidence from the respondent feedback suggests a need for support in clarifying policies and procedures, roles, budget, and the use or development of an organizational plan. As my research was not focused on trauma or findings on survivors, should further analysis of this study take a deductive approach with latent level of analysis, it is possible additional layers of non-surface level codes and themes may be found more congruent with insecurities, fairness, anxiety, dissatisfaction, and other areas surrounding surface level emotions and feelings. Based on respondent

participation and findings, it would seem that any cost reduction initiative would struggle to be successfully implemented given the current culture and organizational dynamics. Research findings suggest that more investigation is needed to explore the phenomenon of organizational outsourcing and downsizing. This study was viewed through a qualitative inductive approach and semantic theme, where other approaches may contribute additional information or outcomes to further the research data and findings. Additional research on outsourcing and downsizing from other agencies and organizations could also benefit the client organization, whereas this study focused solely on the experiences of the education agency staff and management. Future research on other agencies associated with higher education could bring a more comprehensive understanding of the population's true experiences.

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Appendix A: Service Order Agreement

Walden University: Service Order Agreement

Project Proposal- Professional Administrative Study (PAS)

This Project Proposal has been drafted by Joshua Bicchinella for the Client Education Agency and is dated 3/23/2023.

Scope of Work

- The PAS is a supervised work of independent scholarship demonstrating the student's ability to apply the knowledge, skills, and techniques learned in courses to solve the needs or problems in the field of public administration, public-sector organizations, and nonprofit organizations. The goal of the PAS is for the student to provide meaningful and unique contributions in the practice of public administration while at the same time helping the client organization solve problems.

  The PAS will result in a formal manuscript designed and written to address the problem in public administration practice. The PAS involves the student completing an applied research study that addresses an actual problem or planning situation. The PAS will take the format of a consulting report with the minimum following sections:
  1. Abstract
  2. Situation or Introduction to the Problem
  3. Conceptual Approach and Background
  4. Data Collection Process and Analysis
  5. Evaluation and Recommendations

Work Phase	Estimated Time Required
Interactions: 1. Researcher will work with Executive Director on Identifies topic or problem. 2. Researcher will prepare a Prospectus. 3. Researcher will prepare a Proposal. 4. Execution and Completion o The research will use electronic surveys to question staff and management. o Instrumentation collection tools include Formsite for surveys. o The organization agrees to provide supporting organizational data that is publicly available, including information pertaining to strategic planning(s), and published meeting minutes.	6-10 months
Outcomes/Deliverables: • Share professional study with the Client Education Agency • Create positive social change	Upon completion of study
Additional Services Provided if Requested: • None, unless agreed to in writing and approved by the Committee Chair and members.	N/A
Total	6-10 months

Services Summary: A complete consulting report with formal recommendations.	**Estimated Length of Engagement:** 6-10 months

Terms of confidentiality and compliance:
In all reports (including drafts shared with peers and faculty members), the student is required to maintain confidentiality by removing names and key pieces of information that might disclose an Institution's/individual's identity or inappropriately divulge proprietary details. If the Institution itself wishes to publicize the findings of this project, that is the Institution's judgment call.
The student will publish the case study in ProQuest as a doctoral capstone (with site and participant identifiers withheld). The case study will be based upon surveys with non-vulnerable adults on the topic of the Institution's business operations, review of public records, and review of internal records/documents related to the Institution's operations that the Institution deems appropriate for sharing with the student. The doctoral student will not use these data for any purpose other than the project outlined in this agreement.
The doctoral student is responsible for understanding and complying with all of the Institution's policies and regulatory requirements.

Ethical Conduct in this Consulting Relationship
The Code of Conduct in the Walden University 2016-2017 Student Handbook and the ethical requirements for IRB compliance.
Also, students are required to uphold professional principles in fulfilling their roles as consultants and coaches to client organizations. Beyond the confidentiality requirements outlined above, three principles are key to ensuring ethical conduct in consulting relationships.

Principle 1: Protect the integrity of Walden University

- Not representing conflicting or competing interests or positioning themselves such that their interest may be in conflict or may be perceived to be in conflict with the purposes and values of Walden University
- Not intentionally communicating false or misleading information that may compromise the integrity of Walden University and of the consulting capstone experience

Principle 2: Exhibit professional conduct at all times

- Respecting the climate, culture, values, and regulatory requirements of client organizations and client workforce members

Principle 3: Protect the promise of confidentiality

- Not using or adapting client organization's data and information after the capstone experience, unless the information has been publically shared by the client
- Not conducting telephone conferences with the client organization in public places where information may be overheard

This Project Proposal has been approved by Executive Director:

_____
SIGNATURE

Appendix B: List of Survey Questions

In your own words, what is the education agency's top priority?
How long have you been employed at the education agency?
What does a typical day at the education agency look or feel to you?
What is your departments top priority?
On a scale of 1 to 8, with 8 being the highest, how connected are you to the mission of the education agency?
On a scale of 1 to 8, with 8 being the highest, how well would you say you understand the vision of the education agency?
What is the biggest concern the education agency is faced with in your own words or phrases?
What is the biggest asset the education agency is underutilizing?
How would you describe your working relationship with peers or management members?
Do you feel appreciated and valued in your role and position, why or why not?
On a scale of 1 to 8, with 8 being the highest, what would you rate your work in terms of less or more stress?
How do you manage stressful situations, how do you cope?
Do you know someone who has exited the organization due to attrition, outsourcing, or downsizing over the past few years and if so, how has that affected you?
Is cost reduction a priority at the education agency?
Is the education agency fulfilling its mission?
Do you feel you have a clear understanding of your role and direct impact to the organization?
How do you define outsourcing?
How do you define downsizing?
Who are the primary stakeholders of the education agency?
How would you describe your workspace, what's it like?
In ten words or less, how would you describe the education agency's culture in your own words?
Do you feel you directly impact decision making?
How often does your department or team meet?
Does the education agency have a current strategic plan? If so, does everyone have access to this plan and if not, should it have one?

Appendix C: Client Deliverable

Research Report
Oct. 2024

STRATEGIC PLAN

Reorganization: An exploration of public workplace outsourcing, a strategic plan.

Joshua Bicchinella
Doctoral Candidate, Doctor of Public Administration

Executive Summary

Overview

As a postsecondary institution that works to authorize, educate, and fund, it's important to ensure adult learners have educational experiences that allow them financial and educational access with an agency that is sustainable. This study is based on data collected from surveying staff and management at the Client Education Agency, comprising of 24 staff members (53% of staff). This study sought to answer the following research question: *What are the perspectives of staff and management concerning the Client Education Agency's strategies that might be considered to meet its directive to downsize and realign the organization for future growth and sustainability?*

Overall, collected perspectives from staff and management revealed that there are several areas surrounding employee well-being and support, external and community relations, organizational culture and dynamics, and organizational efficiency and management practices that require attention to realign the organization to be sustainable in the future.

For these reasons, the institution may be missing out on valuable opportunities that could lead to cost-saving strategies or funding opportunities that could help the institution meet its directive to downsize and outsource to realign the organization for future growth and sustainability.

Key findings are outlined below, followed by recommendations and potential solutions, and conclusion.

Key Findings:

- Theme One (T1): Employee Well-being and Support
  - While the overall tone of respondent feedback is generally positive, ***there are several instances of dissatisfaction***, feeling unappreciated or undervalued, reporting higher levels of stress (42% report a level of 6/8 or higher).
- Theme Two (T2): External Relations and Community Engagement
  - ***A lack of connection with stakeholders across Alaska causes institution to underutilize resources and partners to increase financial support, access, and funding/aid to borrowers across the state*** resulting in a net loss of educational opportunities, growth, and prosperity.
- Theme Three (T3): Organizational Culture and Dynamics
  - ***42% of respondents feel they have no impact on decision making*** within the organization and a smaller percentage of respondents suggested the culture is "floundering for connection."
- Theme Four (T4): Organizational Efficiency and Management Practices
  - Several respondents spoke about procedures, role clarity challenges, and policies affecting their ability to conduct work while operating with a reduced budget. ***There are several discrepancies that present organizational deficiencies*** and existing management practices that require adjustment to realign the organizations trajectory.

*When asked if they had a clear understanding of their role and direct impact to the organization, Respondent H stated: "**not particularly.**'*

Methodology

Using an exploratory qualitative research methodology; a case study was conducted voluntarily utilizing staff and management surveys. The study applied an inductive approach and semantic theme with the public organization. All staff and management members of the age of 18 throughout the organization were invited to participate in the research study. The study focused solely on the experiences of the organization staff and management. Twenty-Four individuals volunteered to complete the survey. Each survey was conducted using Form Site electronically, and each individual provided consent to participate in the research study before completing the survey. As the consent form indicates, all of the participants, sometimes referred to as respondents, will remain anonymous, and any identifying information will be redacted from any published reports.

Analysis

The information gathered from the survey process has been analyzed using a thematic analysis, a widely utilized method in qualitative research to identify and code patterns, themes, and data sets (Braun & Clarke, 2022; Elliott et al., 1999; and Yardley, 2015). This form of analysis was chosen based on its widely accepted methodology and ability to apply independent analysis separate from the theoretical framework while allowing me as the researcher the flexibility to apply any paradigm to the analysis.

Figure A
Recruitment Efforts

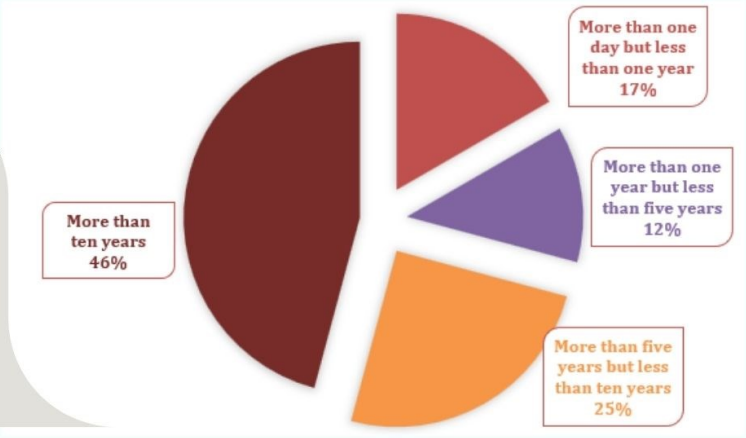
Staff Title	Number Invited	% of Staff Population
Non-Managerial	32	71%
Managerial	8	18%
Senior Manager	5	11%

*While 45 participants were invited to participate in the study, **24 participants or 53% of the organization consented** to participate.*

Figure B
Respondents Length of Service

*Average length of service based on survey respondents/ participants: **Approximately 8.06 years***

**Based on weighted average*



A need for a Strategic Plan:

By developing, implementing, and regularly reviewing a developed and comprehensive strategic plan, the Client Education Agency can better position itself to address the challenges it's facing with outsourcing and downsizing, reduced funding, and drive long-term organizational growth and sustainability initiatives (Akinyele, & Fasogbon, 2010; George, Walker, & Monster, 2019). A comprehensive plan should include stakeholder engagement, rigorous organizational analysis, a clear organizational mission and vision, robust implementation processes, and regular performance reviews to ensure the institution can navigate the complexities of the market while maintaining a focus on its core goals.

Stakeholder Information:

While there are many types of stakeholders that need to be involved to ensure the strategic plan is comprehensive and reflective of the entire organization's needs, it's essential to gather and analyze these perspectives from both internal and external stakeholders. Below are a few external stakeholders gathered from the study that respondents felt needed to be involved in the process.

Figure C
Primary Stakeholders

Students	State of Alaska
Alaskan citizens	Families
Potential students	Schools
School districts	Postsecondary institutions
Education providers	Legislature
Education policymakers	Industry/Workforce
Job training centers	

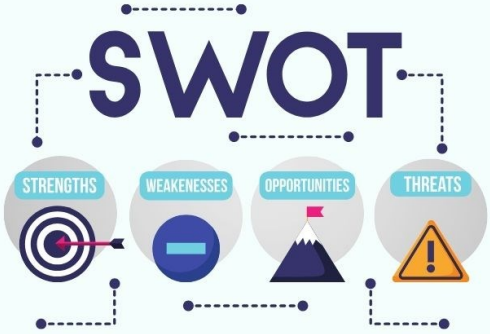
Proposed Solution

The organization should pursue inquiring through survey, interviews, or other methods to identify appropriate internal and external stakeholders for insights into policies, procedures, and challenges that are affecting financial difficulties of students, access, and educational needs.

Engaging these stakeholders regularly will enable the organization to better understand their needs, which in turn will help guide decision-making and future initiatives.

**The institution should remain culturally sensitive to stakeholder expectations and demands. Some respondents referenced a need for travel to provide direct person to person outreach in some rural and native communities.*

Organizational Analysis (SWOT and PEST)



A thorough organizational analysis is essential to assess the internal and external factors that could be affecting an organizations strategic decisions. This can be achieved through both a SWOT analysis and PEST analysis.

* A SWOT analysis reviews an organizations strengths, weaknesses, opportunities, and threats (SW-Internal, OT-external).
* A PEST analysis reviews an organizations political, economic, social, and technological activities that may affect the operation of the institution.

Proposed Solution

The organization should conduct both a SWOT and PEST analysis to provide a clear understanding of where the organization stands while highlighting key areas that require strategic attention. This type of data-driven approach will help support more informed decision-making and help senior managers highlight strategic opportunities and risks *(Porter, 1980; Kaplan, R. S., & Norton, D. P., 1995; Lindstrom, 2000; Beiko, et al. 2018).*

Strategic Framework

Given feedback from respondents, the organization should evaluate the strategic framework and mission fulfillment of the agency. There are clear areas of confusion, misunderstanding, and misalignment amongst participants. Strategic frameworks are meant to define an organization's fundamental purpose. These outlines often contain the organizations long-term goals and provides guiding principles of ethical standards to help organize and establish the culture of the organization. While the organization currently has a mission, it lacks an organizational vision and clear values as there is disagreement amongst respondents regarding the existence of a strategic plan and the mission, vision, and values of the organization left unclear.

Strategic Framework continued ...

Strategic frameworks are a crucial component of any successful strategic plan. According to Hinton, (2022), the mission statement is the "foundation" of any strategic plan (pg. 31). Mission statements have changed over the years, with more modern examples stripped down to provide a very simple, basic, and concise statement of purpose with values and vision statements being separated from the mission (Hinton, 2022).

Further, the organizations vision statement and values statement go on to better explain what the organization stands for, and a clear description of organizations strategic position and future goals and interests for a specified period of time (ex: 3 years, 5 years, 10 years). All three are necessary to comprise an effective, efficient, and comprehensive strategic framework within to execute the strategic plan.

Proposed Solution

According to Balter, Meredith, Powell, & Arnold (2022), who assessed the challenge of assessing mission fulfillment in a high-level accreditation and College situation, trends were identified that found the organization failed to appropriately measure mission fulfillment within the strategic framework (pg. 1). Similar to the client organization in this study, there are several instances of confusion and failure to appropriately measure the fulfillment of the mission as it exists currently. It is suggested that the organization establish a committee or work in collaboration with the oversight board to redefine or better communicate the organizations mission, vision, and values.

Implementation of Developed Plan

Successfully implementing a strategic plan is critical and often challenging, especially with the initial development and implementation. Even well-crafted and developed plans can fail if not executed correctly, the process must be focused on achieving strategic and organizational objectives. Structure, systems, and the organizations culture need to align in order to have successful execution. Furthermore, implementation requires clear organizational communication, and shared access and understanding at all levels of the organization to ensure individual and team actions/goals align with the greater more broad strategic goals Kaplan & Norton, (2019). A robust implementation plan and process must be in place to ensure new strategies have an opportunity within the organizational culture to allow these to be successful without staff impeding success.

Proposed Solution

By establishing and developing a strategic plan, leaders have the opportunity to better guide strategic initiatives, while assessing and implementing change with greater and more defined purpose. Upon implementing the developed strategic plan, leaders can outline action plans, resource allocation, length of time for the plan to be in effect, and various responsibilities and the organizational framework. With an established plan, senior leaders can better utilize change management practices to pivot and adjust various organizational strategies to more efficiently communicate to the organization and stakeholders to keep everyone engaged and informed while equipping staff with necessary training, programs, and monitoring as needed. It is proposed that the organization develop and implement a published strategic plan for a time frame of 3-5 years.

Regular Review Periods

Review periods allow organizations to adapt to changing environments, measure progress and performance, align with organizational goals, better manage risk, and encourage continuous improvement. Review periods help hold leadership and teams accountable while establishing a clear framework for assessing individual and team contributions to the organization's overall success. A regular strategy review will allow the organization to realign its approach based on stakeholder feedback. By continuously improving and aligning with both internal and external conditions, the overall strength of the organization improves and greatly increases its likelihood for long-term success while remaining accountable to the executive team and strategic goals of the organization. Further, a periodic review of the organization can uncover potential risks or ineffective objectives/goals whether internal, or external allowing the organization to be proactive to mitigate them. Whether it's competition, customer preference, or technological advancements, the business environment can and does change rapidly. Regular reviews help ensure the organizations strategy remains relevant and competitive.

Proposed Solution

Establish regular review periods for management and staff to review performance metrics, objectives and goal progress, and adaptation and refinement practices. All levels of the organization should develop and have Key Performance Indicators (KPI's) commonly used to allow an organization access to quickly assess and evaluate key areas within the organization such as finance, operations, and strategic initiatives to evaluate progress. The review periods should include assessing any implemented stakeholder feedback while assessing organizational objectives and goal progress, recalibrating or refining as needed. It is recommended the organization establish quarterly review periods and adjust as needed.

Conclusion

One of the most interesting and challenging outcomes from the study's surveys was the openness and vulnerability of the participants. Each participant openly communicated their perspectives, opinions, concerns, and beliefs associated with the organization and its mission, vision, and values associated with outsourcing, downsizing, and strategic planning. While their positions varied in length of service from less than a year to more than ten years, they all provided essential information that can help guide and lead this organization to effectively develop and implement a strategic plan. Finally, the organization should consider investing time and resources in further evaluating staff and stakeholder perspectives before pursuing the other recommended solutions.

The proposed recommendations to help guide the client organization forward are outlined below:

- Gather and evaluate stakeholder information (internal/external)
- Conduct a SWOT and PEST organizational analysis to evaluate and give a visual representation of the organizations position
- Revise or develop the strategic framework to include a clear and publicly accessible mission, vision, and value statement
- Implement a developed strategic plan to help manage and monitor organizational progress and adjust as needed
- Schedule regular review periods to evaluate progress to make informed changes or adjustments rather than waiting for prolonged periods of time

By taking the time to create, develop, and implement an effective strategic plan, the organization increases its likelihood that it will succeed and achieve their desired outcomes (Porter, 1980; Kaplan, R. S., & Norton, D. P., 1995; Lindstrom, 2000; Beiko, et al. 2018).

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Appendix D: Codes and Themes

Code	Categories/Patterns	Themes
Burnout, Stress, Lonely, Supportive team members, Positive relationship, Love, Very supportive relationships, Appreciation and value, Flexible hours, Work-home life balance, Take breaks, Time management, Exercise, Music, Visuals, Communication with supervisor, Communication, Current staff feedback, Positive manager, Challenged and defensive relationships, Friendly co-workers	Employee Experience	Employee Well-being and Support
Collaboration across Alaska, Communication, Outreach, Community organizations, Engagement, Families, Legislative policymakers, Promoting education, Education support, Financial support, Promoting access, Educational financial resources, Financial compliance	Access and Promotion	External Relations and Community Engagement
Work space, Culture, Decreased productivity, Tenured employees, Rewarding, Alaskan demographics, Competitors, Education Value, Pay, Accept and navigate, Coffee, Communication, Communication with supervisor, Decreased productivity, Deep breathes, Exercise, Emotions or feelings, Lists, Music, Work-home life balance, Walk away, Visuals, Take breaks, Time management, Prioritize tasks, Scheduling, Lack resources, Relax, Reprioritize as needed, Burnout, Cheap labor, Conflicted contributions, Coverage, Difficult, Dismissive, Drowning, Eliminating positions, Hiring difficulty, Increased responsibilities, Increased workload, Instability, Juggling work, Vacant positions, Trust challenges, Lack of upward mobility/progression, Missed opportunities, Negative morale, Overwhelming, Process inconvenience, State connection, Staffing, Reduced budget	Environment	Organizational Culture and Dynamics
Role clarity, Role evolution, Role uncertainty, Task management, delegation, Policies, Procedures, Compliance, Decision making, Strategic plans, Organizational connection, Reduced budget, Financial support, Lack resources, Financial aid, Funding, Access to existing draft, Staff access, Relevant, Resources, Retention, Reduced budget, Valuable products, Update	Operations, Management and Leadership	Organizational Efficiency and Management Practices