

Charitable organisations and ambidexterity: implications for charity sector leaders

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**Charitable Organisations and Ambidexterity:
Implications for Charity Sector Leaders**

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Charitable Organisations and Ambidexterity: Implications for Charity Sector Leaders

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Abstract:

Purpose – This article is an outcome of professional doctoral research into charitable organisations and ambidexterity. It offers a new contribution to the organisational literature on charity and organisational ambidexterity, through determining key components of organisational ambidextrous design in the delivery of social mission.

Design/methodology/approach - The research was conducted using a mono method, in the form of 14 semi-structured interviews with executive members of UK based charities in the disability, health, or social care arena. Analysis took place through a reflexive thematic analysis process.

Findings – Findings culminated in eight key components for the application of organisational ambidexterity in charity.

Practical implications – The article points to clear evidence of organisational ambidexterity represented in multi-dimensional structural models, culture, systems and strategy, which has resulted in a model of components for ambidextrous working relevant to the charity sector.

Theoretical implications - The research advances prior debates, relating to charities and organisational ambidexterity respectively, and develops previous associated research on organisational ambidexterity and public enterprise. In doing so, it proposes a new framework model of eight components for ambidextrous working in charity.

Research implications and opportunities– Findings are based on a small purposive research sample and are embryonic, meaning that there is opportunity for this field of study to evolve and mature over time.

Social implications – Research within this article provides awareness and new knowledge for charity sector leaders and managers in the achievement of social mission.

Originality/value – To the best of the author's knowledge, this article represents the first scholarly research conducted into organisational ambidexterity applied to private charities in the UK.

Keywords – Charity, NPO, organisational ambidexterity, dynamic capability.

Paper type – Research Paper

Introduction:

The survival and sustainability of charities has been a long-term challenge for the sector (Clifford, 2017). Traditionally, charities have endeavoured to execute their philanthropic cause, often working within unpredictable and volatile external funding markets to achieve sustainability over time. Inevitably, this has led to competing demands between balancing social mission and money in charity survival (Henderson

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3 and Lambert, 2018), and the “need to recognise competitive realities and the
4 competencies required for success” (Bennett, 2016, p. 333). Indeed, charities are
5 faced with the dual requirements to sustain in the short term and to innovate to achieve
6 social mission in the long term. They therefore have a complex challenge to deliver a
7 clear organisational strategy that plans to manage the demands on delivery on present
8 social purpose, and predict the innovation required to sustain that or its future chosen
9 mission. In spite of this duality of focus and requirement, there appears to be very
10 little published consideration of social mission and strategy through this twin track lens
11 (Sinha, 2015).
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15 Organisational theory referring to the challenge of balancing the contending
16 requirements of efficiency and flexibility dates to the 1960’s (Thompson, 1967) and
17 proposes that different types of organisations are associated with different strategies
18 and environmental conditions (O’Reilly and Tushman, 2013). The term ‘organisational
19 ambidexterity’ was coined by Duncan in 1976, as a means of framing the simultaneous
20 requirement to achieve efficiency in the present and innovation in the future. March
21 (1991) developed the concept further introducing the twin requirements of exploitation
22 and exploration. The dichotomy of these requirements heavily resonates with the
23 challenges faced within the charity sector however this research found no prior
24 scholarly research which considers the survival and sustainability of private charitable
25 organisations through the lens of organisational ambidexterity. Whilst limited research
26 has taken place applying organisational ambidexterity within public state run, not for
27 profit enterprises (Bryson *et al.*, 2008; Cannaerts *et al.*, 2016; Cannaerts *et al.*, 2019;
28 Palm and Lilja, 2017; Peng, 2019), no prior research is found relating to independently
29 registered not for profit charities. This leaves a significant gap in the academic
30 literature, which takes into consideration the private charity sector. There is also an
31 absence of practical and applied theoretically informed guidance for charity sector
32 leaders, which enables ambidextrous leadership, design and delivery within charitable
33 organisations.
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38 The research discussed within this article seeks to address this gap, by examining the
39 organisational concept ‘organisational ambidexterity’ in the context of private
40 charitable organisations. In doing so it offers significant new contribution to the
41 organisational literature on charity and organisational ambidexterity, as well as new
42 knowledge to charity sector leaders through determining key components of
43 organisational ambidextrous design in the delivery of social mission organisations.
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47 The rest of this article is organised into four main sections beginning with a review of
48 the literature which takes into consideration, individual and combined perspectives on
49 the topics of organisational ambidexterity and charity/social mission. Secondly, the
50 methodological approach and considerations taken within the research design. This is
51 followed by a third section on the findings drawn from the thematic and sub thematic
52 framework developed through the analysis and interpretation of semi structured
53 interviews with charity sector executive leaders. The fourth and final section concludes
54 with implications for charity leaders. A new component model for organisational
55 ambidexterity in charitable organisations is presented. Implications for theory,
56 limitations of the research, and the implications and opportunities for future research
57 are discussed.
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Review of Literature:

Organisational Ambidexterity in context:

The concept of organisational ambidexterity has received considerable and growing attention in the field of leadership and management over the last twenty years. With origins in organisation theory where the trade-off between efficiency and flexibility were originally debated (Thompson, 1967), the term ambidextrous organisation was originally introduced by Duncan (1976), as a way of describing the dual structures needed within organisations to manage activities with varying capacity and time requirements (Birkinshaw and Gupta, 2013). It was some 15 years later when March (1991), published his paper 'Exploration and Exploitation in Organisational Learning' that the focus and functionality of the dual structures became defined. He identified; "exploration includes things captured by terms such as search, variation, risk taking, experimentation, play, flexibility, discovery, innovation. Exploitation includes such things as refinement, choice, production, efficiency, selection, implementation, and execution" (March, 1991, p. 71). Furthermore, the requirement for balance in the dual functions and the complexity of doing so, was highlighted as fundamental to enabling organisational survival in the short-term and sustainability in the long-term.

Primarily, researchers and writers have sought to understand the complex relationship between exploration and exploitation (Andriopoulos and Lewis, 2009; Judge and Blocker, 2008; Koryak *et al.*, 2018; O'Reilly and Tushman, 2008; Peng, 2019; Posch and Garaus, 2019; Raisch and Birkinshaw, 2008; Turner and Lee-Kelley, 2013), drawing on the paradoxes to explain risks in failing to maintain the right balance at the right time and the tensions and opportunities inherent in its ongoing management. In his recent and unique article on organisational ambidexterity in the public not-for-profit sector, Peng (2019) suggests that organisations may look to implement organisational ambidexterity for reconciliatory, mutually beneficial, and balanced solutions as a mechanism to resolve inherent differences in their design. At the same time, Peng (2019) highlights the potential for ambidextrous resolution to be the cause of organisational tension "because of the duality in terms of the resource allocation, change rhythm, decision process, structural design, and management culture" (Peng, 2019, p. 253), all of which may differentiate the dual elements of the organisation.

Resulting from previous research, three key types of organisational ambidexterity have emerged to explain how ambidexterity can be designed structurally and contextually within an organisation. These will be offered in summary, prior to consideration of capability in their application, a theme which dominates the literature.

Firstly, sequential (temporal) ambidexterity where the functions of exploration and exploitation are managed separately and consecutively over time (O'Reilly and Tushman, 2008, 2013; Peng, 2019; Sinha, 2015). This school of thought identifies the impact of changeable external market factors and advancements in technology as predicating the requirement for organisations to adapt accordingly. As noted by key scholars in this field, O'Reilly and Tushman (2008), this type of ambidexterity is "feasible" (O'Reilly and Tushman, 2008, p.193), however may rely on slower paced predictable market factors and an organisation being able to choose its given response.

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3 Secondly, structural (simultaneous) ambidexterity is based on the premise that
4 exploitative functions and explorative functions occur concomitantly in separate
5 organisational departments or units (Asif, 2017; Gibson and Birkinshaw, 2004; O'Reilly
6 and Tushman, 2008, 2013; Raisch and Birkinshaw, 2008). Significant to this type of
7 ambidexterity and worthy of further investigation is the premise determined by O'Reilly
8 and Tushman, (2008) that each sub-unit works to a "common strategic intent, an
9 overarching set of values and targeted linking mechanisms" (O'Reilly and Tushman,
10 2008, p. 193) and in doing so use "different competencies, incentives, systems,
11 processes and cultures – each internally aligned" (O'Reilly and Tushman, 2008, p.
12 193). The structural model shifts traditional thinking in relation to differentiations in
13 ambidextrous functions towards one of multi-functional cohabitation and duality.
14 Hence, mutually reinforcing, and interconnected departments working towards
15 maintaining stability and progressing change.
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20 Third to emerge as a form of organisational ambidexterity in academic discourse is
21 contextual ambidexterity. This progresses the initial thinking from within sequential and
22 structural forms based on organisational and strategic design to one of multi-level
23 integration (Gibson and Birkinshaw, 2004; Sinha, 2015; Swart *et al.*, 2019). Key to
24 this approach is the identification of behavioural capability at the business unit level
25 and the role of 'human capital' (March, 1991; Turner *et al.*, 2013) in the effective
26 execution of ambidextrous practice. In contrast to structural ambidexterity with
27 separated units, the premise of contextual ambidexterity is that the joint requirement
28 of exploitation and exploration is integrated in practice across multiple organisational
29 units and levels.
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33 The principal emerging theme from the literature on the concept of organisational
34 ambidexterity in all its forms, is the basis upon which, the required organisational
35 capability to deliver effective ambidexterity can be determined. Organisational
36 ambidexterity is not having specific organisational structures, designs, or activities but
37 the capability to manage competing demands, which can be enabled by structures,
38 designs and activities. 'Dynamic capability', a term coined by O'Reilly and Tushman
39 (2008), is foundational to the development of this understanding. Associated with two
40 critical management functions; the ability to sense change and the ability to respond
41 to openings and threats "as a dynamic capability, ambidexterity embodies a complex
42 set of routines including decentralisation, differentiation, targeted integration, and the
43 ability of senior leadership to orchestrate the complex trade-offs that the simultaneous
44 pursuit of exploration and exploitation requires" (O'Reilly and Tushman, 2011, p. 6).
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47 *Findings and Frameworks in organisational ambidexterity*

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50 As an evolving concept, the literature on organisational ambidexterity tells a story of
51 discovery resulting from predominantly systematic reviews of literature over time (Asif,
52 2017; Benner and Tushman, 2003; Birkinshaw and Gupta, 2013; Bodwell and
53 Chermack, 2010; Bryson *et al.*, 2008; Judge and Blocker, 2008; March, 1991; O'Reilly
54 and Tushman, 2008, 2013; Raisch and Birkinshaw, 2008; Sinha, 2015; Turner *et al.*,
55 2013;). Some of the earlier reviews (Benner and Tushman, 2003; Judge and Blocker,
56 2008; O'Reilly and Tushman, 2008, 2013), traced the foundations of the concept
57 focusing on the dual requirements of exploration and exploitation and the requirement
58 for dynamic capabilities for performance achievement. Others, including more recent
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reviews (Asif, 2017; Raisch and Birkinshaw, 2008; Sinha, 2015), focus on the identification of antecedents to organisational ambidexterity through the literature.

Key authors from the field of organisational ambidexterity literature (Asif, 2017; O'Reilly and Tushman, 2008, 2011; Palm and Lilja, 2017) have developed frameworks for the measurement of organisational ambidexterity. From their research into fifteen commercial organisations confronted with the need for ambidextrous practice, O'Reilly and Tushman (2008), propose five conditions for leaders in ambidextrous organisations:

1. A compelling strategic intent that raises the significance of applying both exploitative and explorative means
2. an articulation of a common vision and values, that support ambidextrous design and practice
3. a senior team that explicitly owns the unit's strategy of exploration and exploitation
4. separate but aligned architectures such as business models, structures, and cultures which operate at executive and front-line levels; and lastly,
5. the ability of the senior leadership to tolerate and resolve the tensions arising from separate alignments.

(O'Reilly and Tushman, 2008)

Significantly, O'Reilly and Tushman (2008, 2011), found these conditions to enhance the implementation of ambidextrous practices through the effective management of dynamic capabilities. The model produced is simple and compelling however the research sample was small. Recognising limited comparable research at that time, the authors also acknowledge the requirement for more research, which considers ambidexterity as it is applied in organisational practice.

In subsequent research, specifically appertaining to the public sector, Palm and Lilja (2017), identify nine enablers to organisational ambidexterity. Putting the service user first these are: understanding beneficiary needs; management that promote explorative practices; effective discussion; ambassadors as enablers; the allowance of mistakes in practice; funding; a systems view of how the organisation operates; the implementation of innovation; and rewards for exploitation/exploration success. Palm and Lilja (2017), recognise the limited research to date into organisation ambidexterity and public sector organisations and as such, offer a small contribution to the literature on organisational ambidexterity in a not-for-profit sector. Asif (2017), in exploring the antecedents of ambidexterity proposes two taxonomy frameworks of which one is, "based on infrastructural elements, including organisational structures, processes, and context, while the other is based on different organizational levels at which different antecedents exist" (Asif, 2017, p. 1489). Further to this, Posch and Garaus (2019), take the antecedent of strategic planning and consider its effect on organisational ambidexterity concluding the value of strategic planning in organisational ambidexterity when the leader's motivation towards explorative methods is very high.

Charity and Mission in context

For charities, it is their constituted social mission that acts both as an anchor and a driver in their pursuit of specific social deliverables. It anchors by providing clear value

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3 to its existence and effect on economic, environmental, and social problems; and it
4 drives through providing clear moral purpose in the form of socially impactful
5 objectives usually incorporated within short-term organisational strategies (Cipriani *et*
6 *al.*, 2020). Through the lens of ambidextrous design and practice, it is the very
7 “articulation of a common vision and values” (O’Reilly and Tushman, 2011, p. 9), to
8 which a social mission equates in the charity sector. However, there is very limited
9 scholarly research which attempts to consider the dynamics between charity social
10 mission, survival, and sustainability through the lens of organisational ambidexterity
11 (Bryson *et al.*, 2008; Cannaearts *et al.*, 2016; Cannaearts *et al.*, 2019; Peng, 2019; Palm
12 and Lilja, 2017).

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16 Notwithstanding this, there is high level of correlation between the prior debates on
17 charity and not for profit organisations (NPO) and the dimensions that exist within the
18 concept of organisational ambidexterity. In response to the internal and external
19 drivers faced by charities, the use of business-like methods as an enabler to
20 maintaining mission integrity or diversification as a determined way forward has
21 attracted various scholarly interest (Dart, 2004; Cipriani *et al.*, 2020; Horvath *et al.*,
22 2018; Maier *et al.*, 2016; Panda, 2019; Peric *et al.*, 2020; Robichau and Wang, 2018;
23 Suykens, 2018; Svensson, 2020). Notably, Peric *et al.* (2020), identify the need for a
24 business ecosystem in NPOs, which supports dynamic activity towards efficiency in
25 deploying resources to achieve mission goals. Similar to the drivers for social mission
26 noted above, the drivers for becoming business-like come from internal and external
27 sources including internal accountability and governance expectations set by the
28 senior leadership team, cultural expectations translated in values and policies, and
29 working practice driven through contracts and processes. Externally, it is meeting the
30 impact of the environmental, social, and political conditions determined above as
31 driving the requirement for social mission, that set the requirement for business
32 practice.

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36 In contemplating how NPOs balance the requirements between internal capability and
37 external demands, Miller (2018) suggests three areas of focus for managers in
38 delivering on NPO strategy: firstly, the value to the public of the services created;
39 secondly, sources of legitimacy and support; and finally, operational capacity to deliver
40 on the value (Miller, 2018). This speaks to the second condition chosen by O’Reilly
41 and Tushman (2011) “a compelling strategic intent” (O’Reilly and Tushman, 2008, p.
42 197), as an enabler of ambidextrous design and practice. Human and social capital
43 as an enabler to organisational performance and NPO sector effectiveness (Bixler and
44 Springer, 2018; Peric *et al.*, 2020) can also be paralleled with research, which debates
45 the role of organisational, social, and human capital made within organisational
46 ambidexterity (March, 1991; Turner and Lee-Kelley, 2013; Turner *et al.*, 2013).

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50 Furthermore, maintaining mission integrity can foster innovation leading towards
51 performance (Miller, 2018; Renjini, 2018; Svensson *et al.*, 2020). This is an important
52 point when considering the reactive/proactive dichotomy in dealing with pressures
53 towards survival and sustainability within charity business. As noted by Miller (2018),
54 “non-profit organizations often develop innovative, unique, or purpose-built products
55 or services to fill a social need” (Miller, 2018, p. 34). Undeniably, the requirement for
56 charities and NPOs to become more corporate to meet their funder’s expectations has
57 in turn led them towards improved creativity, efficiency, quality, and effectiveness that
58 may not have been achieved without such driving pressures (Cipriani *et al.*, 2020;
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3 Miller, 2018). The dynamic nature of this capability in a constantly changing
4 environment is what enables charities to continuously survive and sustain.
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7 There are many examples of dynamic capability and competency being detected in
8 research on charities and NPOs to date (Cipriani *et al.*, 2020; Henderson and Lambert,
9 2018; Kalttenbrunner and Reichel, 2018; Panda, 2019; Peric, 2020). According to
10 Kalttenbrunner and Reichel (2018), dynamic capabilities enable organisations to make
11 the most of opportunities when they arise by identifying the correct resource and plan
12 to respond to them; and they enable an aligning of the organisational position to that
13 of the external environment. Significantly, and in relation to managing ambidextrous
14 design, “DC’s can cope with dilemmas in terms of multi-dimensional, partly conflicting
15 interest, such as discrepant dominant logics of diverse internal and external
16 stakeholders” (Kalttenbrunner and Reichel, 2018, p. 996). In connecting the capability
17 to the value of human capital, the authors determine the importance of participative
18 leadership and empowerment at the contextual level of the organisation, which links
19 to O’Reilly and Tushman’s (2008) final condition; “the ability of the senior leadership
20 to tolerate and resolve the tensions arising from separate alignments” (O’Reilly and
21 Tushman, 2011, p. 9).
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25 Hence, the applicability of the concept of dynamic capability in the charity/NPO sector
26 and the ability of these organisations to deliver on this well, is supported by research.
27 Peric *et al.* (2020), positively suggest that social missions lead to ways and outcomes
28 of delivering a charitable business that are “more complex and multifaceted than those
29 in for profit organisations” (Peric *et al.*, 2020, p.185). Looking forward however Peric
30 *et al.* (2020), foresees changing social and technological conditions as necessitating
31 a new approach from charities in how they lead and manage strategies, which deliver
32 on social change. The authors view assets such as human capital, especially that with
33 capacity for practical and creative outcomes, which aligns with explorative capabilities,
34 as most important to social impact overall.
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37 *Findings and Frameworks in organisational ambidexterity and charities.*

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40 A narrative appraisal of the two areas of organisational ambidexterity and
41 charity/social mission offered inclusive interpretation of key literature in both subject
42 areas. There were no findings for the concept of organisational ambidexterity and the
43 context of charitable organisations together from the narrative review. Based on this
44 finding, a comprehensive systematic literature review, which combined the subject of
45 organisational ambidexterity and charity/social mission, took place, and similarly
46 returned no finding of this application. Significantly however, both areas of review
47 resulted in two contributory and supportive outcomes. Firstly, five articles with a
48 relevant and associated theme of organisational ambidexterity in association with
49 *public* not for profit enterprises, funded by government were found (Bryson *et al.*, 2008,
50 Cannaerts *et al.*, 2016, 2020; Palm and Lilja, 2017; Peng, 2019). Notably, the
51 frameworks for the conceptualisation of organisational ambidexterity developed
52 through these works identify the role of vision, mission, and focus; strategic leadership
53 and organisational architecture as consistent evidence of organisational ambidextrous
54 design, with strategic intent, culture, systems, external stakeholders, and
55 technological advancements also being found. This evidence base whilst limited, has
56 external validity in so much that it is generalisable beyond their specific research
57 context of public not-for-profit enterprise (Bryman and Bell, 2015) to the closely
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3 associated research context of private not-for-profit charity. As such, it offered
4 knowledge, which informed the formulation of this research, and which could be
5 considered in comparison against the research findings. Secondly, the reviews
6 demonstrate a high level of correlation between the prior debates on charity/NPO and
7 the dimensions that exist within the concept of organisational ambidexterity. In
8 applying the concept of organisational ambidexterity to public, state run organisations,
9 the articles offer some interesting and transferrable findings to both the private for-
10 profit sector and separately, the non-profit sector.
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13 Bryson *et al.* (2008), in considering strategic orientation in ambidextrous public
14 organisations, begin from a predisposition that ambidextrous working through
15 exploitation and exploration (March, 1991) in the not-for-profit sector, is a perquisite
16 for success. The authors consider the conditions set by O'Reilly and Tushman (2008)
17 noted above, and the requirements beyond organisational structure for senior
18 leadership capabilities. Drawing on the work of Miles and Snow (1978), Andrews,
19 Boyne and Walker (2006), and Bettis and Prahalad (1995), Bryson *et al.* (2008)
20 determine nine propositions for increased success for public sector organisations
21 through organisational ambidexterity:
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- 24 1. effective relationships with oversight authorities (legislative, executive, and
- 25 2. responsive autonomy in relation to political oversight and influence
- 26 3. a statement of strategic intent which justifies ambidexterity
- 27 4. strong organizational culture, linked to mission
- 28 5. effective strategic leadership
- 29 6. strong planning and decision-making system
- 30 7. ambidextrous organizational architecture
- 31 8. effective relations with partners and suppliers, and,
- 32 9. effective utilization of technology, which includes that sustaining and disruptive
- 33 technologies will be managed effectively

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39 (Bryson *et al.*, 2008, pp.16-18)

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41 Nearly a decade after Bryson *et al.* (2008), Palm and Lilja (2017), drew on the
42 propositions of Bryson *et al.* (2008), and the conditions set by O'Reilly and Tushman
43 (2008), and combined them with quality value to frame their own investigation into two
44 public sector organisations to determine a series of enablers for organisational
45 ambidexterity as quoted, then explained below:
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- 48 • “organize for good understanding of user needs and situation” i.e., explore and
- 49 exploit in accordance with the needs of the beneficiary group to ensure a quality
- 50 led and legitimate service
- 51 • “A management team that realizes and can communicate the need for
- 52 exploration” thus acting as the fulcrum for participants working together
- 53 • “dialogue” to enable and communicate the interrelationship between the
- 54 different elements of explorative and exploitative working
- 55 • “ambassadors” to progress new explorations from the concept to delivery
- 56 • “a culture that allows mistakes” which support exploration risk and tolerance
- 57 • “Budget for exploration and exploitation”

- “A system view” for all employees to enable them to understand the interdependence and benefit of ambidextrous working
- “Focus on implementing innovations” beyond conceptualising
- “Incentives for both exploration and exploitation” through a measurement framework

(Palm and Lilja, 2017, pp. 14-16)

Concomitant to previous literature (Bryson *et al.*, 2008; Leonard-Barton, 1992), which identify an exploitative leaning in charity/NPOs, Palm and Lilja (2017) recognise the necessity of developing explorative abilities and of the importance of quality value. Specifically, for organisational ambidexterity, they name placing the beneficiary at the heart of organisational design and having capable and committed leadership to orchestrate participation around that design as key.

The third and fourth articles relevant to the research topic are those by Cannaerts *et al.* (2016, 2019). In their comparative case study research into ambidextrous design and public organisations the authors found that decentralised structures resulted in greater emergent thinking and employee participation at the team level, with variable results in the areas of formalisation and specialisation. They also found consistently high levels of differentiation between management who focused on exploration and other employees who focused on exploitative activity. Challenges were identified in integration of explorative and exploitative areas due to their specified tasks and effective communication was named a necessity to overcome this. No conclusive evidence was found in the area of contextual ambidexterity.

Later, in their article ‘Ambidexterity in Public Organisations: A Configurational Perspective,’ Cannaerts *et al.* (2019) took the ideas of Bryson *et al.* (2008), a step further and through conducting primary data analysis into public centres, proposed six design and leadership conditions for organisational ambidexterity. Under structural ambidexterity, the authors identified conditions of differentiation, centralisation, and forceful leadership as key to success. Under contextual ambidexterity, the authors identify individual autonomy, supportive context and enabling leadership as prerequisites for success through ambidexterity. Whilst Cannaerts *et al.* (2019), usefully identify conditions for ambidexterity under different structural arrangements, findings from the research could not determine how the asserted conditions impact in practice based on the organisations assessed. Instead, the authors found different combinations of conditions within differing structures with the only surmisable fact being that centralisation was not conducive to ambidextrous outcomes.

Peng (2019) offers a precise framework through the lens of organisational ambidexterity to formally locate the required structures, processes, and behaviours of the sector towards strategic success. Writing from a premise that organisational ambidexterity is relatable to non-profit work due to its intent in relation to value creation, Peng (2019) develops a framework for organisational ambidexterity in the public value process, which assimilates exploitation and exploration into the different types of ambidexterity (sequential, structural and contextual) in order to identify where the tensions and remedies exist and in testing this framework draws specific conclusion: “An ambidextrous vision favours the search for balanced solutions in organisational changes, even if, in some cases, it also becomes a source of new tensions” (Peng, 2019, p. 258).

The Literature Review – a summary:

Both areas of review (organisational ambidexterity and charity/social mission) resulted in two contributory and supportive outcomes. Firstly, five articles with a relevant and associated theme of organisational ambidexterity in association with *public* not for profit enterprises, funded by government were found (Bryson *et al.*, 2008, Cannaerts *et al.*, 2016, 2020; Palm and Lilja, 2017; Peng, 2019). These have external validity in so much that it is generalisable beyond their specific research context of public not-for-profit enterprise (Bryman and Bell, 2015) to the closely associated research context of private not-for-profit charity. Secondly, the reviews demonstrate a high level of correlation between the prior debates on charity/NPO and the dimensions that exist within the concept of organisational ambidexterity, which was significant to this research as it indicated a clear scope for application of the concept and context combined.

Methodological Approach:

To empirically determine key components of organisational ambidextrous design in the delivery of social mission, interviews were conducted with Executive Officers (Chief Executive Officers or Directors) from national, UK based charities in the provision of disability, health, and social outcomes. The rationale behind selecting this research audience was that they would have accountability for the strategic objectives within the charity and an increased likelihood of leading organisational ambidextrous design including exploitative and explorative initiatives. Also, through leading and representing broadly similar organisational mission types, it was assumed that findings would be generated from broadly similar organisational contexts.

Consistent with an inductive, interpretivist approach, the identification of a small number of national charities within the disability, health and social outcome, UK charity sector increased the likelihood of comparability between organisational experiences within the organisational context and subsequent findings. Subjects were initially identified through theoretically relevant convenience sampling (Etikan *et al.*, 2015) and combined with priori purposive snowball sampling to enable participants who met the target audience criteria to be selected based on the proposed research questions. Hence, using the initial group of research participants identified through convenience sampling, contacts were then made with recommended subjects within the professional network who met the target audience criteria.

A final sample of fourteen research participants represented one charity each. Of these, five participants were identified through convenience sampling, nine were identified through snowball sampling. Six were men, and eight were women. All had been within their existing job role for a minimum of 12 months with the longest time in post by a participant being 27 years.

The research was conducted through a mono method qualitative methodology in the form of semi-structured interviews. This method was chosen as it combines aspects of structured interviews with several fixed and consistent questions, with non-standardised open conversation including steering questions to facilitate responses (Stokes and Wall, 2014). Consistent with a relativist (constructionist) ontological position, the context of a qualitative semi-structured interview method involved

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2
3 interpersonal participation between the researcher and the research subject in the
4 evolution of the narrative. Open framed questions were used in relation to the key
5 areas of enquiry using language such as 'tell me', 'explain to me', 'describe to me',
6 followed by probing 'what' and 'how' questions and finally clarifying closed questions.
7
8

9 A reflexive thematic narrative analysis method (Braun and Clarke, 2022) was chosen
10 as the most appropriate means of organising and coding the narrative data within the
11 research. A priori codes were used within a research analysis framework to determine
12 initial higher-level codes against which, further induced data codes were mapped.
13 These latter codes, driven by data, were identified in name by the researcher or 'in
14 vivo' named by the researcher (Saunders *et al.*, 2016). All subsequent data items were
15 fully coded in the development of the data set to establish codes and themes
16 (Saunders *et al.*, 2016). In accordance with the researcher's axiological position,
17 reflexivity was used in the thematic analysis process in the form of reflexive thematic
18 analysis (Braun and Clarke, 2022).
19
20

21 The narrative was analysed in accordance with Braun and Clarke's (2006), 6 phase
22 guide in using thematic analysis. Data familiarisation under phase 1, took place
23 through the cleansing of the recorded transcripts, which involved simultaneous playing
24 of the recorded interview in picture and audio, and the transcribed words. This enabled
25 the researcher to ensure accuracy in relation the words used and silent
26 communication, which was also recorded for detail. Once cleaned, every transcript
27 was re-read to check for clarity and to further enable familiarity. Phase 2 involved
28 inductively generating new codes under the a priori codes used within the initial
29 analytical framework. As each transcript was analysed, new codes were manually
30 developed to give meaning to the data and as such, expand the data set. Sub-codes
31 were identified at two levels beneath and across the initial a priori codes. With the
32 development of new codes, previous transcripts were re-read, assessed for relevancy
33 and re-coded as necessary. Every code was allocated a number and colour to enable
34 clear identification and visual representation of the code as located in text within each
35 transcript, which furthered familiarisation and the identification of emerging patterns.
36 Once all transcripts had been coded and recoded, themes were identified in
37 accordance with phase 3. Looking across the data set (vertically below the a priori
38 codes and horizontally across them), areas which presented similarity in meanings or
39 patterns or similarity in meaning were identified and clustered. Themes were then
40 reviewed against codes across the data set and in accordance with the research
41 question as per phase 4. Electronic visual mapping was used for coding and theme
42 generation. The defining and naming of the themes inherent within Braun and Clarke's
43 (2022) phase 5 took place within the preparation for writing and in writing the analysis
44 and report section (phase 6). The process of re-familiarisation and reinterpretation of
45 the transcript enabled improved clarity of the themes identified in language and
46 interrelationship to inform the structure of the findings and analysis.
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52 Findings:

53 This section summarises the findings from three overarching themes and their sub-
54 themes from the research, taking into consideration the previous literature in response
55 to the research objective sub-criteria set.
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Table 1. below represents the thematic and sub-thematic framework in full, which was developed through the analysis of coded narrative, in accordance with Braun and Clarke's (2020) qualitative method of thematic analysis noted above. There were nine primary themes in total, each with three or four secondary themes. Some but not all contain tertiary themes developed through reflexive interpretation of the discussions held. Hence, whilst some of these themes drew significant commentary and have been selected, others drew less commentary but were significant to the analysis and thereby considered relevant and important to include.

TABLE1: THE THEMATIC AND SUB-THEMATIC FRAMEWORK

Overarching Theme: Delivering on Social Mission		
Primary theme	Secondary theme	Tertiary theme
The role of beneficiaries	Mission diversification	
	Needs linked to organisational design	
	Influence on Culture	
The shape of operations	Influence on organisational design	Beneficiary need
	Mission enablers	Financial income
		Beneficiary need
Influence on strategy	Allied Working	
	Lessons from Covid	
	Strategic periods	
	Strategic intent	
	Inhibitors	
Overarching Theme: Culture and Capability		
Primary theme	Secondary theme	Tertiary theme
Role and composition of senior leadership team	Leadership Approach	Strategic leadership
		Imparting awareness
	Diversity and Culture	Team diversity
		Subcultures
		Operations/strategic
	Managing ambiguity	Long-term/short-term
		Delegation
	Freedom	
	New capabilities	
Factors affecting strategic capability	Emergent requirements	External Changes
		Inhibitors
		Commercial competence
		Trustees
Conditions for performance	Cultural Conditions	
	Workforce incentivisation	Practices
		Limitations
	View of mistakes	Culture
		Limitations
Overarching theme: Structure and Design		
Primary theme	Secondary theme	Tertiary theme
Strategic requirements	Innovation	Drive
		Design
		Trustees
	Governance and accountability	Decision making systems
		Trustees
Organisational Structure	Innovation	Incremental/transformational
		Linked to data and insight
	Structural design	
Being business-like	Structure for long/short-term	
	Business-like practices	Business language
	Business-like models	
	Competitors	
	Systems and technology	

Authors own work.

Overarching theme: social mission

Social mission as an anchor and a dominant driver in the achievement of charitable outcomes was an overriding theme throughout the interviews. For every research participant the vision, mission and values of the charity were upfront, central, and integral to their workings as an organisation. As one participant put it, “the mission is really important because that actually is the unifying purpose. That’s why we’re all here. It’s what everything stems from” (Participant A). Three primary themes, linked to the achievement of mission emerged from the discussions: the role of beneficiaries; the shape of operations; and influences of strategy.

Primary theme: The role of beneficiaries

The research found that Charity mission is representative of the “compelling strategic intent” (O’Reilly and Tushman, 2008, p. 197) coined by O’Reilly and Tushman (2008), except for charities it is outcomes for people in society that compel their commitment. The role and requirements of beneficiaries, past, present, and future was the dominant factor influencing mission integrity. This was above any other factor including income source and political context. Where charities had historically diversified their mission, it was due to three main reasons; expansion because the existing beneficiary requirement had grown due to increased demand or lack of social provision; due to new evidence-based insight linked to the condition or cause; or because the charity had adopted similarly associated causes consistent with their mission at the time. Central to this way of working was mission led behaviours and cultures where charities were committed to being led by the circumstances, needs and voices of beneficiaries in their approach.

“There are times when charities do either need to change their mission or their operating model to fit with that... with that context, but also, you know, to be really close to the beneficiaries and to really understand from their beneficiaries what their needs and preferences are so that they can, you know, really deliver on their mission in a way that feels most relevant to the people who we’re here to serve.” (Participant O)

Primary theme: The shape of operations

The research found mission maintenance through the adaption of strategy or operating model as evident with charities moving away from traditional services to remain relevant in the long-term. There were several examples of larger charities transitioning from providing social care to providing social change through campaigning and research. This placed some charities in a position of compromise given their commitment to being beneficiary led but at the same time intending to change their delivery models to offer improved impact and outcomes for a greater number of beneficiaries in the long run. Charities offering primarily services or were funded through commissioners appeared more constrained in explorative development due to the short-term requirements of beneficiaries and funders for traditional service provision.

“...we were able to demonstrate that by these interventions, that we were able to provide over the long term, it saved the national purse about one million pound per person because of the improvements that we’d been able to introduce, and individuals were able to maintain and therefore ongoing support needs being less. Great stuff, absolutely fantastic. But of course, financial pressures come in and the commissioner is not, they say to us, they’re

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2
3 *not interested in lifelong savings. They've got a budget to manage over a year and that's*
4 *all they're interested in." (Participant P)*
5

6 Participants identified allied working with other charities as a key enabler to mission
7 success, due to its potential to achieve considerable outcomes for shared and
8 common beneficiary groups more widely. This finding sits in contraposition to the
9 traditional literature, which considers organisational ambidexterity in a competitive
10 commercial environment.
11

12
13 Whilst vision, mission and values were strongly evident, architecture, design or
14 deliverables linked to ambidextrous working were not evident in the examples
15 provided. No participant spoke of having a mission that explicitly raised the
16 significance of applying both exploitative or explorative means or having an
17 "articulation of a common vision and values that provide for a common identity"
18 (O'Reilly and Tushman, 2008, p. 197), that supported ambidextrous design and
19 practice. Notwithstanding this, aspects of dynamic capability (Duncan, 1976) in
20 response to external market changes were evident through the examples analysed,
21 with findings demonstrating senior leadership capability in balancing the tension in
22 short-term gains and longer-term development for the benefit of the beneficiary,
23 charity, and its staff.
24
25

26
27 *"I think we're taking the organisation on a bit of a journey from being an organisation where*
28 *the kind of point of gravity is around the provision of social care, to being an organisation*
29 *where the point of gravity is about driving social change (...) we're trying to work out mid-*
30 *flight, how do you turn this thing around." (Participant K)*
31

32 *Primary theme: Influences on strategy*

33

34 The focus on the shorter-term was presented through examples of traditional cultures
35 and designs serving to anchor charities in the past and present making strategic
36 change slower or more complex to manage and resolve. Balancing communication of
37 short-term positioning for staff delivering current services and change towards future
38 service design within strategic transition was commonly acknowledged.
39

40
41 *"...there will be people within the organisation who are focussing on the here and now, the*
42 *short-term and so that is their focus. They will be dealing with the commissioning of today,*
43 *they will be dealing with the occupancy, the day to day running of the business. There'll be*
44 *others in the organisation, myself, the board, some other members of the team who are*
45 *actually then looking beyond the here and now and looking at the future and looking at*
46 *actually trying to envisage difficulties in this ever-changing world, trying to envisage what*
47 *the sector will look like in 10 years-time and therefore what we need to do today to get*
48 *ready for that future." (Participant P)*
49

50 Significantly, secondary sub-themes identified the importance of effective strategic
51 direction and governance as a pre-requisite for effective resource allocation in
52 ambidextrous working (O'Reilly and Tushman, 2013), and was supported through
53 reflective examples of what would have enabled improvements in strategic
54 development. These included improved governance and leadership at the board and
55 executive level.
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Overarching theme: Culture and capability

The second of the overarching themes was capability in managing the dichotomies of the exploitative and explorative relating to people; specifically, the culture of people in organisations and their capability to deliver against the organisational requirement. Primary themes of role and composition of senior leadership, factors affecting strategic capability and conditions for performance arose under this thematic area.

Primary theme: Role and composition of senior leadership

The research determined the significance of capable senior leaders able to effectively engage a workforce around strategic intent, whilst at the same time serving to resolve the tension between short-term deliverables and long-term strategic direction and change (Bryson *et al.*, 2008; O'Reilly and Tushman, 2008). Over half of participants interviewed identified the importance of leaders raising strategic awareness across their charities and using inclusive practices to link the organisational intent as a success factor in their development. Challenges in communicating change as part of the task of creating strategic awareness was discussed by just over a third of participants. Some of this linked to senior level capability around communication and being able to land bigger picture thinking within a predominantly front-line workforce. For others, the challenge linked to the task of explaining strategic change due to resistance or status quo cultural thinking.

"I've always sought of felt like, you know, our job as leaders is to try and work out where the future is and position your organisations there and quite firmly, and I see lots of people who are quite nervous about the future and want to kind of stay where they are." (Participant K)

However, there was no explicit finding of such engagements being inclusive of ambidextrous design or practice with the differentiation between the functions not being explicitly raised in the discussions. Consistent with previous research (Beckman, 2006; O'Reilly and Tushman, 2013), team diversity as a strategic enabler was identified by participants as important towards managing differentiation. This included the need for differentiated professional experience, capabilities, and stylistic preference to manage the organisational requirements. It also included operational versus strategic and short-term versus long-term organisational priorities, with evidence of the need for caution appertaining to subdivision reconciliation. Indeed, examples provided in relation to diversity and differentiation in culture, related to the requirement for the senior team to be able to combine their skills to deal with the competing demands of day-to-day business and longer-term developments at the same time.

"...good leaders are ambidextrous. Good leaders do both. Good leaders both drive for transformation and continuously improve your business as usual. Uhm, I think you need to be able to do both (...) my team need to signal collaboration an integration in the way that we work as the top team, you know, the capabilities we need are to be outward facing, be really strategic, forward thinking, you know, and kind of creating the conditions for other people to kind of manage the day-to-day operations." (Participant O)

This was a consistent challenge across the charities represented with aspects of managing risk and opportunities in the short term and delivering towards direct survival, versus the ability of the organisation to engineer itself against a longer-term

1
2
3 direction (March, 1991). Hence, the requirement for the senior team to be 'dynamically
4 capable' (Birkinshaw and Gupta, 2013; O'Reilly and Tushman, 2008) of resolving such
5 differences internally and in connection with the external world within varying capacity
6 and time requirements was representative of previous research (Horvath, 2018;
7 Kaltenbrunner and Reichel, 2018).
8
9

10 *Primary theme: Factors affecting strategic capability*

11

12 The research identified factors affecting strategic capability linked to the reconciliation
13 of short-term and long-term priorities for senior leaders and was set in the context of
14 social mission success. Challenges preventing or inhibiting effective strategic
15 progress included senior leadership skills in translating strategy into operational
16 direction, responsiveness towards innovation, and commercial competence linked to
17 business-like practices.
18
19

20
21 *"...we haven't recruited to that skill set of being able to translate strategy into operational*
22 *direction (...) I think there's something, you know, about are you capable of doing this? and*
23 *therefore come on the journey and we can take you along, or is it like that there isn't the*
24 *capability within the organisation that we need to bring different people in or whether that's*
25 *in addition or in exchange for, but we know there needs to be more accountability down the*
26 *chain as it were."* (Participant B)
27

28 External funding management was also seen as a challenge. Funding sources were
29 found to have greater impact on charities where these were through short-term
30 contractual or commissioned means with participants reflecting challenges to strategic
31 capability consistent with previous research (Henderson and Lambert, 2018;
32 McDonald, 2007; Robichau and Wang, 2018).
33

34 Findings were made in relation to differentiated cultural behaviours within departments
35 and the need for centralisation consistent with O'Reilly and Tushman's, (2008)
36 "common strategic intent, an overarching set of values and targets" (O'Reilly and
37 Tushman, 2008, p. 192). Further to this, participants spoke of the importance of higher-
38 level integration of the whole organisational model and harnessing expertise from
39 across the charity thus suggesting the effect of multi-level integration at a contextual
40 level (Gibson and Birkinshaw, 2004; Sinah, 2005; Swart *et al.*, 2019).
41
42

43 *"...we've been through a heck of a lot, and I think one of the key lessons that's emerged*
44 *from this, is the power of devolving, delegating tasks, requirements, particular to lower*
45 *levels of staff who have expertise, have the relationships, and have the willingness to*
46 *actually take on responsibilities."* (Participant A)
47

48 Board capability emerged as a cross-cutting theme, identified by participants as an
49 enabler for success with risk appetite and the requirement for exploitive behaviours as
50 prerequisites in the enablement of ambidextrous working. Across the theme of
51 strategic capability, the research found clear evidence of dynamic capability and
52 ambidexterity in practice in line with the definitions of O'Reilly and Tushman (2008,
53 2011).
54
55

56 *Primary theme: Conditions for performance*

57

58 The theme of performance resulted in comparative analysis with the commercial
59 sector and the identified need for increased risk and performance appetite consistent
60

1
2
3 with the work of Miller (2018). “Core rigidities” (Leonard-Barton, 1992) were identified
4 in the form of workforce fear and siloed working promoting status quo attitudes and in
5 preventing explorative behaviours. The research identified a range of cultural tensions
6 in the delivery of explorative and exploitative practices. These were due to
7 governance, risk appetite and opportunity.
8

9
10 *“...the tensions we see in this organisation are probably from those who work in kind of*
11 *risk, compliance, and insurance roles versus those who work in areas like service delivery,*
12 *in fundraising that needs to be much more dynamic and driven and need a much higher*
13 *risk appetite.” (Participant M)*
14

15 Evidence of attempts at reconciliation between alignments were consistent with the
16 findings of O'Reilly and Tushman (2008). The research found that workforce
17 incentivisation around human values such as enablement, recognition, engagement,
18 and trust were highly present although monetary recognition a greater challenge,
19 resulting in external market positioning under financial constraints.
20

21
22 *“Charities are generally better in terms of investing in developing their skills of their staff*
23 *and offering them opportunities. Usually, it isn't financial that's the downside. We don't have*
24 *that incentive that's financially rewarded, and we do have opportunities.” (Participant H)*
25

26 Potentially linked to this finding, there was no outcome in relation to incentivisation
27 linked to ambidextrous practice, specifically exploitative or explorative functions as
28 found by Palm and Lilja (2017). Furthermore, it was found that freedoms in the form
29 of enablement, trust and empowerment were emerging within the charities under
30 consideration indicating a more autocratic, and supportive approach developing
31 towards a culture, which enables explorative development (Peric *et al.*, 2020). Many
32 participants supported a culture of risk taking as part of an explorative agenda towards
33 change and development demonstrating confidence building, agility and role
34 modelling as important in this process.
35

36 37 *Overarching theme: Structure and design*

38
39 The overarching theme of structure and design came from responses linked to
40 business practices, strategy, capability, innovation, and systems a priori codes and as
41 such was cross cutting within the research. Combined, participants generated primary
42 themes relating to strategic requirements, organisational structure, and being
43 business-like through their responses.
44

45
46 The research found that the charities represented were delivering on both explorative
47 and exploitative functions of organisational ambidexterity identified by March (1991),
48 with leaders demonstrating their endeavours to resolve the inherent complexities and
49 challenges of the dualities in these functions with an underlying social mission
50 (O'Reilly and Tushman, 2008).
51

52 53 *Primary theme: Strategic requirements*

54
55 A significant number of participants referred to new organisational strategies either
56 being in development or implementation following the Covid pandemic where old
57 strategies had been put on hold or superseded by new circumstances or ways of
58
59
60

working. Evidence of newly realised agility, dynamism and creativity had occurred for many in response to recent external market forces and named as practices to sustain.

“So what I'd like us to do here, and the world changed, is that we bring in our business model much more closely, we have those financial controls, which we haven't been great at recently because we've run out opportunities and we haven't looked further enough ahead at projecting, but still allowing us, to give us the scope, to still do that experimentation, innovate, see what works, pullback and have that agile way of running.”
(Participant G)

Innovation as a form of exploration was commonly identified as a strategic solution and with that came a range of organisational design considerations inclusive of the adoption of business modelling, funding models and recording models to enable the effective management of exploration projects. The requirement for effective decision-making systems to inform strategic progression was also regularly noted with examples provided of situations of where projects had failed due to lack of oversight resulting in layered services and mission creep. Indeed, the importance of appropriate governance and accountability and its role in enabling appropriate balance between exploitative and explorative functions within a strategic framework was found.

“... So, we are starting to introduce frameworks for how we make decisions, you know start having some very clear outcomes, looking at things like the size of the opportunity and the complexity of executing that opportunity, building matrices of, you know what others affectively, the major projects with, you know fantastic opportunities, but also quite potentially, quite complex to execute.” (Participant N)

Notably, the favouring of exploitative functions at the Trustee level, was felt to be limiting explorative practices towards long-term sustainability. It also highlighted the criticality of Board competence and dynamic capability, in managing risk and opportunity, thus reinforcing the requirement for all levels of leader to “be able to orchestrate the allocation of resources between the routine and new business domains” (O'Reilly and Tushman, 2013, p. 18).

“I just think we've got the balance wrong a bit and I think therefore when you get to things like, if I talk a bit about innovation and setting up more [name of charity] enterprises, whatever it might be, as a vehicle for being agile, you know, real nervousness is, can we set the governance up so, you know, when you get to the point whereby there's a risky idea or something fails or whatever, you don't suddenly get 11 trustees wanting to jump on top of it and get involved.” (Participant D)

The research found high levels of tension between ensuring effective accountability and governance linked to the delivery of charitable objectives and spending fundraised/public income in comparison to the need for agility, new discovery, risk taking and innovation.

Primary theme: Organisational structure

Participants talked about structure as an enabler for innovation, in the context of organisational design and in relation to short term and long-term organisational time periods. The function of innovation was identified by all participants as a necessary enabler to strategic success within the research (Miller, 2018). Social mission was identified as a driver and enabler for innovation in practice, examples of which correlate with March's (1991) explorative descriptors. Innovation was described by

1
2
3 participants as happening in a variety of ways from focused designated departments
4 or project teams, through to emergent areas of thought, involving practices such as
5 co-production with beneficiaries and incentivisation programmes. Notably, the
6 research found two forms of innovation operating at distinct levels. At the first level,
7 small innovations taking place at a micro level within the organisation for the benefit
8 of incremental improvement. Often described as taking place by staff within frontline
9 job roles or functions, this type of innovation was optimising existing services. The
10 research defined this level, as incremental innovation and predominantly linked to
11 explorative requirements operating at a contextual level within the charity. At the
12 second level, innovation was described as sizeable, strategically planned, delivered in
13 a focused way, at a macro level with the potential to transform the organisation, subject
14 to the success of it as tested in practice. The research defined this level as
15 transformational innovation, linked to explorative requirements, which was typically
16 separated in structural design.
17
18
19

20
21 *"It's innovation that's for transformation or innovation that's for incremental improvement.*
22 *In my head there's two distinctions that I make. So, I think we do the incremental*
23 *improvement. We're getting better at that, but I think now we're at a place where we've got*
24 *a clear strategy, we've got a healthy culture, we've got a lot of the right people on the bus*
25 *now, and we've got an operating model that has created the foundations for growth. Now*
26 *we've got an opportunity to kind of go for it, so that's exciting but, you know, transformation*
27 *doesn't, you know it, it's not a big step, it's lots of tiny steps that add up at the end in a*
28 *transformation, so you just have to kind of give it time."* (Participant O)

29
30 In relation to forms of organisational ambidexterity, the research found no evidence of
31 sequential temporal ambidexterity however there was clear evidence of organisations
32 developing separate alignments consistent with structural simultaneous ambidexterity
33 with departments or functions working in areas of insight, marketing, profit innovation
34 and research differentiated although connected with the rest of the organisation.
35

36
37 *"... it was designed that way really to give time to both and making sure that the operating*
38 *model... service delivery model, the process and systems weren't left behind and our*
39 *aspirations in terms of innovation were possible and feasible and the two were able to run*
40 *in parallel with each other so, you know, we, you know, we are linking them very, very*
41 *closely."* (Participant B)

42
43 Conversely, as noted above, in the area of incremental exploration, often for the
44 benefit of service or product optimisation, contextual ambidexterity at the business unit
45 level was evident within the research. Consistent with this, maximising the collective
46 value of the charity to exploit its effect against the social mission, was an overriding
47 intention with examples of both vertical and horizontal integration being given in the
48 conversations held. Combined, the finding of structural and contextual organisational
49 ambidexterity identified hybrid models, subject to the requirement for differentiation of
50 the explorative function. Furthermore, the hybridity in structural models of
51 organisational ambidexterity found links to the finding of dynamic capability (O'Reilly
52 and Tushman 2008), and an indication of dynamic capability in the context of
53 delivering on social mission as being more complex and multifaceted than within 'for
54 profit' organisations (Peric *et al.*, 2020).
55

56
57 *"I would say we are ambidextrous constantly unnaturally but we haven't probably ever really*
58 *understood that that's how we work to be honest, I think (...) you always get people arrive*
59 *and they think we're going to be simple to work within and the complexities of which, the*
60

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3 *complexity in the world that we work with, out there and then internally, how we have to be*
4 *responsive to that in the short, medium and long-term, all at once.” (Participant K)*
5

6 **Primary theme: Being business-like**
7

8 All research participants were using business-like practices in their organisation citing
9 methods of efficiency in processes, value for money, governance and accountability,
10 professional standards and financial transparency as means of delivering in a
11 business-like way.
12

13
14 *“...from the business sector I think we take, I mean I think we take a lens on value for*
15 *money because our donors don't give us money to waste, they give us money for purpose,*
16 *so it's incumbent on us to make sure that our processes are efficient, our, you know, our*
17 *model is, so, you know, is well run, you know, we're transparent about our kind of use of*
18 *finances, you know, and the way that we adopt our... the way we engage and communicate*
19 *with our supporters I think is pretty customer like. It's not the same but it's quite customer*
20 *like and, you know, certainly when we're working with corporate partners or businesses*
21 *who are using our workplace well-being products, then we are essentially operating in a B*
22 *to B, uh, environment, so we are a social business.” (Participant I)*
23

24 The research found clear examples in relation to business-like behaviour, practices,
25 and language consistent with March's (1991) descriptors for exploitation. Business-like
26 practices were found to be directly linked to the preservation of social mission, which
27 is contrary to previous literature (Henderson and Lambert, 2018). The location of
28 beneficiaries as stakeholders and the requirement for charities to survive in the context
29 of external market forces were influencing the adoption and development of business-
30 like practices. This was evident in the short-term and the long-term with services and
31 business type models being developed towards sustainable social solutions. Many
32 organisations were using additional vehicles in the form of enterprises, ventures, and
33 subsidiaries in the development of commercial explorative projects to further their
34 strategic objectives.
35

36
37
38 *“...there's several areas where we are extremely business-like and our retail, you know,*
39 *our retail, our charity shops are run, you know, it's a trading company, it actually is a*
40 *business, but I mean, you know, it's a very ethical business.” (Participant I)*
41

42 The matter of competitors, whilst acknowledged mostly in areas of exploitative practice
43 appeared to be overcome by allied working methods and models with participants
44 demonstrating collective endeavours towards social goals. By re framing the
45 relationships between charities within the same market, away from competition and
46 into a more cooperative and mature space, participants demonstrated success in the
47 effective delivery of charitable objectives beyond the confines of traditional business
48 conceptualisations.
49

50
51 *“... I have a phrase which I used from time to time, which is the relationship of 'co-opetition.'*
52 *so I think when we're at our best actually, uhm, and by which I mean when we have the*
53 *most sort of mature relationships and then it needs to be at the most senior levels, then we*
54 *both cooperate on the things where we think that either these issues are too big or to make*
55 *sense for us to cooperate (...) now in a mature relationship, you cooperate on those things*
56 *knowing full well, that you're also competing with each other.” (Participant I)*
57

58 This finding offers new evidence, which contraposes previous literature highlighting
59 risk to loss of charitable identity (Robichau and Wang, 2018) and social principles
60 (Eikenberry and Kluver, 2004; Peric, 2020) linked to business models and techniques.

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3
4 The use of systems and technologies as a strategic enabler did not result as a theme
5 in the research. There was a collective finding that the charities represented were
6 engaging in data insight and intelligence to inform their decision-making, particularly
7 around explorative practices. However, progress in this area had been challenging for
8 most, due to a historical underinvestment in data and digital capability. This was due
9 to limited strategic awareness, or affordability linked to income and organisational size.
10 Notwithstanding this, systems and technological investment was recognised as
11 important and underdeveloped in the limited examples provided, indicating more work
12 to be done in the adoption of these methods by charities going forward.
13
14

15
16 *".. We're doing a big investment in CRM at the moment (...), But you know, we'd have*
17 *probably struggled to make that sort of systems investment in the past because we'd have*
18 *looked at the price tag and said we're not going to spend it. So having more commercial*
19 *trustees on board helped with that as well, I think."* (Participant N)
20

21 Discussion:

22
23 The research presented is believed to be the first of its kind to consider organisational
24 ambidexterity within the context of private charity sector. Whilst there is no direct
25 comparable research in this field, it builds upon the prior frameworks for organisational
26 ambidexterity (Asif, 2017; O'Reilly and Tushman, 2008, 2011; Palm and Lilja, 2017),
27 as well as those within the closely associated domain of public not-for-profit
28 enterprises (Bryson *et al.*, 2008, Cannaerts *et al.*, 2016, 2020; Palm and Lilja, 2017;
29 Peng, 2019), and offers clear evidence of the concept being applied against the subset
30 of objective criteria set.
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33 *Vision, mission, and focus, in the achievement of ambidextrous working*

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35 There was clear evidence of the function of social mission being used by executive
36 leaders in the achievement of ambidextrous working. Outcomes they articulated for
37 people in society were found to be life changing or lifesaving as opposed to social
38 outcomes per se, acting as a dominant driver and enabler towards achieving their
39 cause. This original finding within the charity sector was thus found to act in
40 accordance with the condition of "compelling strategic intent" (O'Reilly and Tushman,
41 2008, p. 197) identified by O'Reilly and Tushman (2008) in the traditional literature
42 focused on private sector organisations.
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46 Maintaining a strong vision, mission, and focus, in the context of external factors,
47 especially emerging out of a pandemic, which necessitated ambidextrous working led
48 to a finding of 'dynamic capability' from the charity leaders represented, consistent
49 with the definition of Duncan (1976). The research found that senior leaders could
50 balance the tension in short-term deliverables and longer-term strategic development
51 for the benefit of the beneficiary, the charity, and its staff. The focus on the shorter-
52 term was also presented by leaders through examples of traditional cultures and
53 designs serving to anchor charities in the past and present.
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57 Executive leaders further identified the importance of effective strategic direction and
58 governance as a pre-requisite for effective resource allocation in ambidextrous
59 working, also consistent with the work of O'Reilly and Tushman, (2013). Aligned with
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3 the previous literature (Henderson and Lambert, 2018; McDonald, 2007; Robichau
4 and Wang, 2018), charities offering mainly services or services funded through
5 commissioners appeared more constrained in explorative development due to the
6 short-term requirements of beneficiaries and funders for traditional service provision.
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9 Building upon previous literature reviewed, this research offers new knowledge in the
10 area of allied working, identified by leaders as a key enabler to social change aligned
11 with mission intent. This sits in contraposition to the traditional business literature,
12 which considers organisational ambidexterity in a competitive commercial
13 environment. Also, the research found the maintenance of mission integrity through
14 the adaptation of strategy or operating model as evident, with charity leaders moving
15 away from traditional services to remain relevant in the long-term. This is in
16 contraposition to previous discourse, which identifies strategy and operating model
17 diversification as risking mission drift.
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21 *Managing the dichotomies of the exploitative to the explorative*

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23 The research found capable senior charity leaders able not only to communicate but
24 effectively engage a workforce around strategic intent. This takes the findings of the
25 previous literature identifying “strategic intent” (O’Reilly and Tushman, 2008) and a
26 “statement” (Bryson *et al.*, 2008, p.16) a stage further signifying a commitment of
27 charity leaders towards inclusivity, empowerment, and participation towards social
28 mission success. In support of previous literature, the research found evidence of
29 charity leaders resolving the tension between short-term deliverables and long-term
30 strategic direction and change (Bryson *et al.*, 2008; O’Reilly and Tushman, 2008).
31 However, the research found no explicit finding of such engagements being inclusive
32 of ambidextrous design or practice with the differentiation between the functions not
33 being explicitly raised in the discussions.
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37 The research brings new perspective on the impact of charitable social mission acting
38 as an anchor as well as a driver around organisational change initiatives. Linked to the
39 concept of “dominant logics” identified by Bryson *et al.* (2008, p. 9), the research found
40 the role of beneficiaries and workforce advocacy for them, as driving a strong
41 perspective against explorative progress. This offers original thought on the
42 paradoxical relationship between change, which necessitates exploration to sustain
43 social mission and a resistance to exploration, which curtails changes in the delivery
44 of social mission. Findings within the research also found the primary need of the
45 present beneficiary group as significantly influencing the resolution of competing
46 demands and requiring leadership capability in resolving complexity in outcomes
47 linked to social demand (Peric *et al.*, 2020).
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51 Comparable with private sector research, charity leaders within this research
52 determined differentiated cultural behaviours and higher-level integration of the whole
53 organisational model, and harnessing expertise from across the charity, thus
54 suggesting multi-level integration at a contextual level (Gibson and Birkinshaw, 2004;
55 Sinah, 2005; Swart *et al.*, 2019). The research also highlights trustee board capability
56 as a critical enabler for success, with leaders identifying risk appetite and the
57 requirement for explorative behaviours as prerequisites in the enablement of
58 ambidextrous working.
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3 Consistent with previous research (Miller, 2018), the research found the need for
4 increased risk and performance appetite within the charity workforce, which
5 overcomes siloed working and status quo attitudes towards improved exploitative
6 behaviours. Leaders identified a range of cultural tensions in the delivery of explorative
7 and exploitative practices due to governance, risk appetite and opportunity, with
8 evidence of attempts at reconciliation between alignments consistent with the findings
9 of O'Reilly and Tushman (2008). Hence, private charitable organisations actively
10 manage tensions between exploitative and explorative functions in the same way as
11 their private sector counterparts, with greater constraint around capability linked to
12 incentivisation, countered by cultures of enablement and support.
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15 16 *Charity architecture towards delivering ambidextrous outcomes*

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18 The research originally finds that like their private business sector counterparts, private
19 charities deliver explorative and exploitative functions of organisational ambidexterity
20 (March, 1991), with leaders demonstrating their endeavours to resolve the inherent
21 complexities and challenges of the dualities in these functions with an underlying
22 social mission (O'Reilly and Tushman, 2008).
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25 Consistent with previous research (Miller, 2018), the research found that innovation
26 as a form of exploration was commonly identified by charity sector leaders along with
27 the requirement for effective decision-making systems to inform strategic progression.
28 As a substantial contribution to new knowledge, the research identified two forms of
29 innovation operating within charities differentially: incremental innovation
30 predominantly linked to exploitative requirements operating at a contextual level within
31 the charity, and transformational intervention linked to explorative requirements, which
32 was typically separated in structural design. The importance of appropriate
33 governance and accountability, and its role in enabling appropriate balance between
34 exploitative and explorative functions within a strategic framework was further found.
35 The research offers new knowledge in finding the favouring of exploitative functions
36 by Trustees, with leaders noting the impact of this in limiting explorative practices
37 towards long-term sustainability.
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41 Structurally, the research found no evidence of sequential (temporal) ambidexterity
42 and clear evidence of organisations developing separate alignments consistent with
43 structural (simultaneous) ambidexterity (Asif, 2017; Gibson and Birkinshaw, 2004;
44 O'Reilly and Tushman, 2008, 2013; Raisch and Birkinshaw, 2008). The research
45 offers further new knowledge in finding incremental innovation (exploration) at the
46 business unit level consistent with contextual ambidexterity (Gibson and Birkinshaw,
47 2004; Sinha, 2015; Swart *et al.*, 2019), and a finding of hybrid models of structural and
48 contextual organisational ambidexterity, subject to the requirement for differentiation
49 of the explorative function.
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52 The research found business-like practices within the charity sector to be directly
53 linked to the preservation of social mission, contrary to previous literature (Henderson
54 and Lambert, 2018). The original finding of allied working and models of collective
55 endeavours offers new evidence, which contraposes previous literature highlighting
56 risk to loss of charitable identity (Robichau and Wang, 2018) and social principles
57 (Eikenberry and Kluver, 2004; Peric, 2020) linked to business models and techniques.
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Conclusion:

The aim of the research was to determine key components of organisational ambidextrous design in the delivery of social mission. In the context of no prior identifiable research in this realm, it brings together prior scholarly debates and finds a high level of correlation between arguments relating to charitable organisations and frameworks for organisational ambidexterity. It builds upon the most recent comparable research domain of public sector charitable enterprise, which offers propositions (Bryson *et al.*, 2019), enablers (Palm and Lilja, 2017), leadership conditions (Cannaerts *et al.*, 2019) and a framework (Peng, 2019) and offers affirming and new components to support the applicability of organisational ambidexterity in the private charity sector, not considered before.

This paper concludes by offering practical implications for charity sector leaders in delivering an ambidextrous approach, implications for theory within the domains of organisational analysis and charity, and implications for further research.

Implications for practice:

In determining how social mission is achieved within charitable organisations through the lens of organisational ambidexterity, the research recommends the following key components of organisational ambidexterity to charity leaders:

- **A clear mission, which determines social outcome by connecting the beneficiary group with the social cause.**

This component was justified through the finding of a mission legitimised by its connection to people, and a life changing or life-saving impact as a social outcome. It is the unifying purpose of the organisation, able to justify short-term exploitative functions and long-term explorative functions through individual or allied contributions.

- **A culture of engagement, empowerment and recognition geared towards short-term and long-term success.**

This component was justified through the finding of effective engagement linked to strategic intent. It also responds to evidence, which justifies empowerment and recognition for the workforce at the contextual level working in exploitative functions and/or offering incremental innovation, through to those focussed on transformational outcomes.

- **A senior team able to broker the complexity of ambidextrous organisational functions and requirements.**

This component was identified through the finding of leadership capability needed to balance and resolve the competing and complex demands of an organisation delivering dual functions of exploration and exploitation, and a mission linked to social cause.

- **Deliberate ambidextrous architecture (culture, operating model, structure), which supports exploration and exploitation in context.**

This component was associated with findings, which support the need for specifically designed conditions, for organisational behaviours, the business model, and structures, which enable the functions of exploration and exploitation to be determined and delivered.

- **Strong organisational decision making, which enables risk and opportunity.**

This component was supported by the finding for effective decision making at senior executive and board levels, to inform strategic progression through explorative endeavours.

- **Enabling and effective governance, which balances the need for organisational ambidexterity in practice.**

This component represents the importance of effective strategic direction and governance as a pre-requisite for effective resource allocation in ambidextrous working. It also corresponds to appropriate governance and accountability, and its role in enabling appropriate balance between exploitative and explorative functions within a strategic framework.

- **Effective relational ecosystems with allies, beneficiaries, and funders.**

This component was supported by the finding of maintaining effective relationships with beneficiaries, allied organisations, and funders as a means of enablement towards balancing the tensions in short-term deliverables and longer-term strategic development.

- **Innovations** which achieve optimisation in the short-term and transformation in the long-term.

Finally, this component was justified by the finding of incremental innovation supportive of explorative requirements, and transformational innovation linked to explorative requirements within effective ambidextrous design.

In total, eight components for ambidextrous working in charity are proposed to inform organisational and strategic planning and design within charitable organisations. Taking forward these recommended components will enable charity leaders to develop strategies, structures, and cultures, which generate balance between the short-term, exploitative functions and longer-term explorative functions. Through improvements in an ambidextrous approach, charitable organisations may increase their chances of sustaining social outcomes for their beneficiary groups and deliver their social mission beyond short-term survival.

Implications for theory:

The research, believed to be the first of its kind to consider organisational ambidexterity within the context of private charity sector, offers new theoretical knowledge towards the scholarly debates in the areas of charity/NPO and

organisational ambidexterity. It builds upon existing frameworks developed within the literature, which aim to measure organisational ambidexterity (Asif, 2017; O'Reilly and Tushman, 2008, 2011; Palm and Lilja, 2017), as well as those within the closely associated domain of public not-for-profit enterprises (Bryson *et al.*, 2008, Cannaerts *et al.*, 2016, 2020; Palm and Lilja, 2017; Peng, 2019).

In separately evaluating the prior debates on charity/not-for-profit organisation against the dimensions that exist within the concept of organisational ambidexterity, the research found a high level of correlation between the two. There is clear evidence of organisational ambidexterity represented in multi-dimensional structural models, culture (governance and leadership) systems and strategy (social mission), which has formed a model of components for ambidextrous working relevant to the charity sector.

This advances the prior debates and develops previous research within associated with organisational ambidexterity and public enterprise, by proposing a new framework model of eight components for ambidextrous working in charity. Notably, the research identified a new category of 'governance' as a component of ambidexterity in charity, not identified with in previous research. The area of technology identified by Bryson *et al.* (2008), was not identified as a theme within the research, albeit was recognised by many participants as an important domain for development and as such, may become evident under further empirical inquiry.

Implications and opportunities arising from the research:

The research opens new pathways for further research, which has the potential to inform professional organisational practice and with that, influence the success of social mission causes. Notwithstanding this, the research has a number of limitations. Firstly, the generalisability of the research is limited because a small research sample taken from the disability, health and social segment of the charity sector has been used as the basis of the research inquiry. It is not possible to say as to whether the findings in the research are generalisable to the disability, health and social segment of the charity sector, other segments of the charity sector or indeed, the charity sector more widely. Secondly, the sampling method used was that of convenience and snowball sampling, which were not random in their identification of research participants. The use of random sampling may have improved the generalisability of the data collected and the reliability upon the data found (Etikan *et al.*, 2015). Thirdly, of the charities identified, these were predominantly funded through public fund-raising mechanisms with only a small number who had private or local authority contractual arrangements. Due to the significant difference in the conditions set by such funding arrangements, it may be considered that the findings from charities differentially funded would be dissimilar and therefore not provide a reliable basis for generalisability. Fourthly, the framework of inquiry utilised, which built on previous theoretical frameworks of inquiry into organisational ambidexterity used within the public not for profit sector was predominantly internally focused. This thereby provides a partial view of the overall factors affecting the requirement for organisational change. For example, had external factors such as politics, the economy, societal changes, legal frameworks, and environmental conditions being factored in also, this may have generated a wider set of findings from which, conclusions could have been drawn. Finally, there was a limitation based on the transferability of the previous measurement frameworks adopted, all of which had been based across public sector non-profit

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3 enterprises or private sector businesses. Given that the research enquiry focused on
4 private charitable organisations where no previous research frameworks had been
5 found, the adoption of alternative frameworks was necessary, however may have
6 resulted in predisposed measurement criteria more suited to alternative sectors.
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9 The research, believed to be the first of its kind into organisational ambidexterity in the
10 private charity sector represents a 'tip of the iceberg' of new potential knowledge in
11 the area of study. The findings are embryonic, meaning that there is opportunity for
12 this field of study to evolve and mature over time, to support leaders and managers in
13 the achievement of mission and organisational success. As such, it is recommended
14 that further research is undertaken, which advances empirical inquiry and evidence of
15 organisational ambidexterity in the private charity sector, specifically. The research
16 points to several themes that call for further investigation. Firstly, the implication of
17 mission linked to social outcomes, which is specific to the charity sector and a further
18 understanding of the complexity this creates in the act of ambidextrous working
19 (Cipriani *et al.*, 2020). Secondly, how charities balance the dichotomy of the dual
20 functions of exploration and exploitation contextually (Gibson and Birkinshaw, 2004;
21 Sinha, 2015; Swart *et al.*, 2019) and structurally (Asif, 2017; Gibson and Birkinshaw,
22 2004; O'Reilly and Tushman, 2008, 2013; Raisch and Birkinshaw, 2008) within short-
23 term and long-term time periods. Thirdly, and not specific to the charity sector, is the
24 benefit of further research, which determines the effect of hybrid models of structures,
25 as found within the research, and designs in ambidextrous organisations. Fourthly,
26 research which offers definition of dynamic capability (O'Reilly and Tushman, 2011)
27 towards enabling senior leadership requirements. Fifth, research, which furthers the
28 approach by offering multi-level and multi-method analysis of ambidexterity and draws
29 findings from private, public NPO and private NPO organisations, including a wider
30 participant sample. Finally, this area of enquiry would benefit from further research
31 predicated on a framework built for the measurement of organisational ambidexterity
32 within the private charity sector, and which further tests, expands and refines the
33 components presented in this study.
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