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Understanding Effectuation Theory as an Entrepreneurial Cognitive and Behavioral Process in Firm Creation and Expansion to Create Local, Contextual Knowledge in Morocco

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UNDERSTANDING EFFECTUATION THEORY AS AN ENTREPRENEURIAL COGNITIVE AND BEHAVIORAL PROCESS IN FIRM CREATION AND EXPANSION TO CREATE LOCAL, CONTEXTUAL KNOWLEDGE IN MOROCCO

by

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Ever since I have had rational thought, I have known gratitude for my sister Adrienne Alyzela González. She is my rock: always has been, always will be. She would magically find my socks in a drawer as a child after I'd searched for them in the same spot for 30 minutes. She'd give me half her snack when I dropped mine in the dirt or forgot my dime at home. She taught me how to use a clothes pin to hang towels in the South Texas sun. Hers was the first name I learned to write, after my own. In these last years, she solicited a donor on my behalf that provided a dissertation fellowship, which allowed me to finally accomplish this three-year endeavor. Nani, you are, without a doubt, the wind beneath my wings.

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Ada Alexandria González

DEDICATION

I dedicate this dissertation journey to my parents, Mr. and Mrs. Adán Amos González of Laredo, Texas.

To my Pop, I dedicate the moments of wonder, of not knowing, of venturing out of the country into North Africa to ask questions, drink mint tea, dig my bare feet into the hot sun of the Sahara while I reflected on what I was learning.

To my mother, I dedicate the moments of persistence, of knowing I was capable, of demanding my rights, of suppressing my fear so that, in the end, I could show them what I am made of, lift my head high, and make you proud that I am Rodriguez-González.

UNDERSTANDING EFFECTUATION THEORY AS AN ENTREPRENEURIAL COGNITIVE AND BEHAVIORAL PROCESS IN FIRM CREATION AND EXPANSION TO CREATE LOCAL, CONTEXTUAL KNOWLEDGE IN MOROCCO

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The purpose of this 2-year case study in the Kingdom of Morocco was to understand the entrepreneurial cognitive and behavioral processes expressed in the creation and expansion of a venture by American owners and Moroccan and American team members. The study used an interpretative design and narrative analysis methodology to develop themes. In the first phase of the study, I interviewed the co-founders and associates to learn to what extent the five principles of effectuation theory and other entrepreneurial cognitive processes played a role in the first few years of the school's creation. In the second phase, I worked in tandem with, observed, and recorded the expansion team's sessions during the spring months of 2017 to July of 2019. Themes that emerged from the data were persisting and resilience, maneuvering ambiguity, shifting assets, creative and collaborative solutions, and weighing options and developing criteria. The data tell us that cultural context, original aspirations, and social/human/spiritual capital ground the entrepreneurial decision-making experience in Morocco and are entwined with the principles of effectuation.

A design plan was generated from the findings to create local, contextualized knowledge for the community of learners in Morocco. It documents creation elements and informs future practice for the purpose of building entrepreneurial expertise. Future research might include the

mitigating role of spirituality in persistence of entrepreneurship, the virtue of trust in intercultural studies, and the emotional and psychological trauma associated with failure or threats to life-long investments.

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Context of Study

In 2010, as I neared the completion of my doctoral coursework, I googled teaching jobs in Fez, Morocco, interviewed over Skype, and 9 months later, I was contracted by Michelle Forciea and her then-husband, Jim Hasbrouck as a first-grade teacher and, later, as a curriculum consultant at American School Fez in Morocco.

It was during the 2011-2012 academic year that I became intrigued by the way the school was managed. It was flourishing, despite what appeared to be unregulated delivery of service. The school had no operating scope and sequence, no language or academic admission evaluation instrument or protocol, and an existing, but vague, discipline policy. Yet, every year since 2004, enrollment increased, and every few years, the owners were forced to lease a larger facility. The number of American School Fez graduates that attended European and American universities grew steadily every year, and since 2015 every graduating senior has been accepted to an institution of higher education in the United States or Europe, some with full scholarships.

Several years later, I read about effectuation theory and was reminded of the manner in which American School Fez was managed. I became curious to learn to what extent the five principles of effectuation theory played a role in the creation and development of American School Fez. I contacted M. Forciea in January 2016 and she informed me that they were in the process of establishing new campuses in Rabat and Marrakesh. She asked if I would be interested in working with them. That invitation became the impetus for this study.

For the purposes of this research, I conducted a 2-year case study in the Kingdom of Morocco using interpretative design and narrative analysis methodologies to understand the entrepreneurial cognitive processes expressed in the creation and expansion of a venture by

American owners. In the first phase of the study, I interviewed the co-founders and associates to learn to what extent the five principles of effectuation theory and other entrepreneurial cognitive processes played a role in the first few years of the school's creation. In the second phase, I worked in tangent with, observed, and recorded the sessions of a group of associates during the spring months of 2017, the establishment of a new campus in Rabat in the 2017-2018 school year, and the attempt to obtain authorization in Fez in the 2018-2019 school year. The objective in both phases was to understand how entrepreneurial cognitive processes, including the principles of Effectuation Theory, were expressed in the formation and operation of this organization.

Table 1

Five Principles of Effectuation Theory

Effectuation Theory Key Idea	Definition
Considering available means	An entrepreneur examines who they are (skills, education), what they know (experience), and who they know (friends, family, etc.) as a means of gathering assets
Affordable loss	Identification of how much the entrepreneur can afford to lose and how to minimize loss
Strategic partnering	Obtaining pre-commitments with parties they can trust
Leveraging contingencies	Using unpredictable events as a benefit when uncertainty is almost guaranteed
Agency of the entrepreneur	Without prediction models, the entrepreneur can act on their own accord to seize opportunities

Note. These five principles of effectuation theory were developed with information sourced from the Society for Effectual Action at http/effectuation.org.

The theory of effectuation, first introduced by Sarasvathy (2001), is an entrepreneurial way of thinking and making decisions in situations of uncertainty. Key concepts in effectuation theory include considering available means, affordable loss, strategic partnering, leveraging contingencies, and agency of the entrepreneur. The concepts are presented summarily in Table 1 and in more detail in Chapter 2.

The five principles of effectual thinking were used in this study to examine how the participants considered and acted on decisions about the venture, given conditions of uncertainty.

Statement of the Problem/Research Need

Principles of effectuation theory were derived primarily from expert entrepreneurs and were focused on decision-making through “improvisation, exploitation of contingencies, and market creation through alliances and partnership” (Gabrielsson & Gabrielsson, 2013, p. 1358), and can, therefore, provide insight into how entrepreneurs in stages of creation negotiate conditions of uncertainty (Van Aken & Berends, 2018).

While principles of effectuation were tested with expert entrepreneurs and with established multinational corporations and not-for-profit organizations at the managerial level (Blekman, 2011), the principles have been applied in a limited way in research with businesses of various sizes and ages, such as small and medium-sized enterprises (Guili & Ferhane, 2018; Keupp & Gassmann, 2009; Zucchella & Scabini, 2007). Additionally, the theory has had limited examination in field studies (Arend, Sarooghi, & Burkemper, 2015). A field study of a small and medium-sized enterprise such as this one enriches the body of knowledge in behavioral economics.

Effectuation is a very actor-centric phenomenon because it is based on the identity, knowledge, and personal relations of an entrepreneur who is considered the main proactive agent of change (Sarasvathy, 2001). Galkina and Chetty (2015) have urged that future studies on entrepreneurial decision-making concentrate on individual entrepreneurs as the unit of analysis. Conversely, by ignoring the “embeddedness” of economic activity, some researchers have argued that the social, cultural and political context under which economic activity occurs has been lost (Downing, 2005; Steyaert, 2007; Veciana and Urbano, 2008). They recommended that additional studies include socio-cultural factors in the development of entrepreneurial processes and action.

Purpose of the study

The purpose of this 2-year case study was to explore and understand the entrepreneurial cognitive processes of American entrepreneurs in the establishment and expansion of a firm in the host country of Morocco.

At a theoretical level, the purpose of the research was:

1. To contribute empirical research to the theory of effectuation, an entrepreneurial way of thinking and making decisions in situations of uncertainty; and
2. To understand how entrepreneurs negotiate their positionality while engaged in the entrepreneurial process in a developing country.

At a practical level, the purpose of the research was:

1. To provide "thick description" of how an entrepreneurial team thinks, strategizes, implements, and assesses entrepreneurial activity; and
2. To develop a framework or set of principles that entrepreneurs can utilize in the expansion of an established small and medium-sized enterprise or organization.

At a personal level, the purpose of the research was:

1. To sharpen my analytical and writing skills through a highly reflective and reflexive data collection and analysis methodology to accurately describe how entrepreneurial people take risks, seize opportunities, and create markets; and

2. To deepen my understanding of the social, cultural, and economic nuances of the economic and entrepreneurial environment in the North African geopolitical context.

Research Questions

To understand the cognitive processes and strategies of entrepreneurship, the following questions guided this study:

A. Did the entrepreneur(s) use the five principles of effectuation theory in the creation of a firm in a foreign country? Were other cognitive processes and strategies utilized? If so, how?
B. How did these cognitive processes, strategies, and interactions contribute to or hinder the creation of a business venture in a developing country?
C. What entrepreneurial processes and strategies were employed by the owner/directors and expansion team in their effort to expand the business to a second site in Rabat, Morocco? How can the entrepreneur and expansion team utilize these processes and strategies to build local, contextual knowledge for optimum implementation of future schools?

Theoretical Framework

As I explained effectuation theory to a colleague with whom I had previously worked providing advice to small business owners, she exclaimed, “Oh, so, they finally came up with a name for it!” We recalled how difficult it was to get small business owners to write business plans. Most business owners were not in the habit of working through the details of their business strategy, like the feasibility studies, market analyses, or projected financial analyses required for financing. Many of the small business owners with whom we worked wanted gap financing so they could jump start the business and adjust as they needed.

My own life reflects a flexible approach to business development. I established a sole proprietorship in 1988 when colleagues asked me to translate documents from Spanish to English. Over the years, I have conducted program evaluation for projects funded by the Kellogg Foundation, and worked as a sub-contractor for Johns Hopkins University. I have performed teacher training for Texas school districts and completed archaeological studies throughout the American Southwest for the U.S. Forest Service. In every case, I responded to a request for a proposal. Once a project concluded, the business lay dormant until another opportunity arose. I have never written a business plan for this business, established an office outside my home, or hired full-time employees.

It was these personal and professional experiences that resonated with me in the exploration of how an American entrepreneur imagined and created a thriving business in Morocco without a great deal of planning. I was curious to understand how the process might unfold as she and the team, including myself, expanded the enterprise to a second site in Rabat, the capital of the Kingdom of Morocco.

Overview of Methodology

This investigation demanded a qualitative approach in order to decipher the ways that a principal actor and associates contemplated, enacted, and interacted with others in the establishment and expansion of a venture. This case study centered around the phenomena of the entrepreneurial thinking and strategies of the American entrepreneur, the American and Moroccan associates, and the American and Moroccan members of the expansion team. In the first phase, the American co-founders of the school contributed to answering the central question of entrepreneurial thinking and processes through interviews, as they described how the school was established. In the second part of the study, one of the co-founders who is the current director of the school, the expansion team, and I identified the challenges we experienced in the Rabat school venture in real time. The proposed strategies, the rationale for each strategy, and the assessments were data for the study. What we learned from our decisions and actions, and the outcomes and reflections, became part of the design plan. The design plan served as a model of local knowledge of entrepreneurial process. The reflection on the experiences regarding the actions we took were socially embedded (Granovetter, 1985), and formed a web of participants who shaped the school as an economic endeavor (Stake, 2005). This case study was not a methodological choice, but a choice of what was to be studied (Stake, 2005). The specific "thing" being studied was the sense-making of the interactions surrounding the founding of the business and its present iteration to inform future action. The in-depth examination of the past and present processes, strategies, and interactions served as the rationale for calling this an intrinsic case study, while the application of the constructs of what was learned served as a rationale for calling this an instrumental case study.

Because I was involved in helping the owner/director and expansion team identify the processes and strategies employed in the past and present, I used heuristic journaling technique. Heuristic journaling is a type of writing meant for the discovery of connections, such as structure, patterns, and structural changes, and allows for systematic exploration and introspection. The journals served as a data source for the development of and insight into the interpretation of the data. I worked as a teacher and a curriculum consultant at the school during the 2011-2012 academic year, as the school administrator in Rabat from August 2017 to July 2018, and then as the Principal in Fez from August 2018 to June 2019. My role as researcher was researcher-as-participant and constituted an active role in the study. The roles that I played during the implementation of this study served as an opportunity to "address issues of preunderstanding, role duality, organizational politics and explore roles in leading change" (Coghlan & Shani, 2015, p. 53).

The data collection system included scheduled, in-depth, semi-structured interviews and informal conversational interviews with the co-founder/director and five individuals who were significantly involved in the evolution of the school in its infancy. Data collection also included recorded sessions with the co-owner/director and expansion team to articulate the cognitive processes and strategies that were used in the creation of the new school in Rabat. I kept field notes of observations of activities, events, or "daily life" at American School Fez and Rabat, with an emphasis on meetings, conversations, and interactions around the school expansion efforts and review of documents and artifacts, such as files, newsletters, and photographs. Items produced before Institutional Review Board (IRB) approval are considered archival documents. Archival items were collected, photocopied or photographed, and analyzed to complement the stories of the entrepreneur, the associates, and the expansion team of the American School Fez and Rabat community.

I used narrative analysis for examination of stories around school development. Narrative analysis is an emergent process which allows the researcher to identify the entrepreneurial processes and related cognitive constructs within the unit of analysis called stories. The participants and I negotiated the meanings within the micro context of interviews and the themes that emerged around our understandings of the entrepreneurial processes. We specifically examined the data for the five principles of effectuation as well as other operational processes and practices.

Research Site

The study was conducted at the American school sites in Fez and Rabat, Morocco, in North Africa (Figure 1). The American School Fez was established in Fez in 2004 and the Rabat school opened in the fall of 2017. The distance between the two cities is about 207 km, or 129 miles.

The country of Morocco measures 172,413 square miles, with the Atlantic Ocean to the west and the Mediterranean Sea to the north. It shares a border with Algeria to the east and Mauritania to the south and southeast.

Figure 1. Map of Morocco. Sourced from “Morocco” in *In the World Factbook* by the Central Intelligence Agency, 2018. Retrieved from https://www.cia.gov/library/publications/the-world-factbook/geos/mo.html. Public domain. This US Central Intelligence Agency map does not include the disputed Western Sahara region.

As of July 2018, the population of Morocco was 34,314,130 (Central Intelligence Agency, 2018). The Kingdom boasts Arabic and Tamazight, an Amazigh (or Berber) language, as their official languages. Other Amazigh dialects, such as Tachelhit and Tarifit, as well as French, are recognized by the Moroccan government. Spanish and English are spoken throughout the country, but not considered official languages.

Morocco's economy is ranked 57th world-wide with a Gross Domestic Product of U.S. $298.6 billion in 2017, an increase from U.S. $282.8 billion in 2016 (Central Intelligence Agency, 2018). This increase constitutes a 4.1% real growth rate for the developing country. Despite its economic progress, it continues to struggle with high unemployment, which hovers around 10% for adults and about 20% for youth ages 15 to 24. Illiteracy, education, and social issues continue to plague the Kingdom, with rural populations being less literate than the coastal, urbanized cities of Casablanca, Rabat, and Tangier. It is considered a low-middle-income country by Global Entrepreneurship Monitor standards, and has an entrepreneurship index of 15.8, which indicates a medium-to-high level of governmental support for entrepreneurship (Bosma and Levie, 2010).

In another evaluation, Morocco ranked 65 out of 137 countries assessed for both the quality of entrepreneurship and the extent and depth of the environment which supports entrepreneurship (Acs, Amorós, Bosma, & Levie, 2009). Morocco received a 29% index. The United States received 84% and Chad received a 9% index.

Historically, relations between the United States and Morocco have been very good, making Morocco an appropriate site to examine business activity at a micro-level of analysis. In 1786, Morocco was the first country in the world to formally acknowledge the United States as an independent country in a treaty of peace and friendship. Morocco had status as a French protectorate from 1912 to 1956. The United States recognized the Kingdom of Morocco as an independent country in 1956.

In terms of cultural differences, using the cultural dimensions articulated by Hofstede (2011), Morocco and the United States are positioned directly opposite each other in several critical dimensions (Figure 2). Hofstede and Bond (1988) defined culture as "the collective programming of the mind that distinguishes the members of one category of people from those of another" (p. 6).

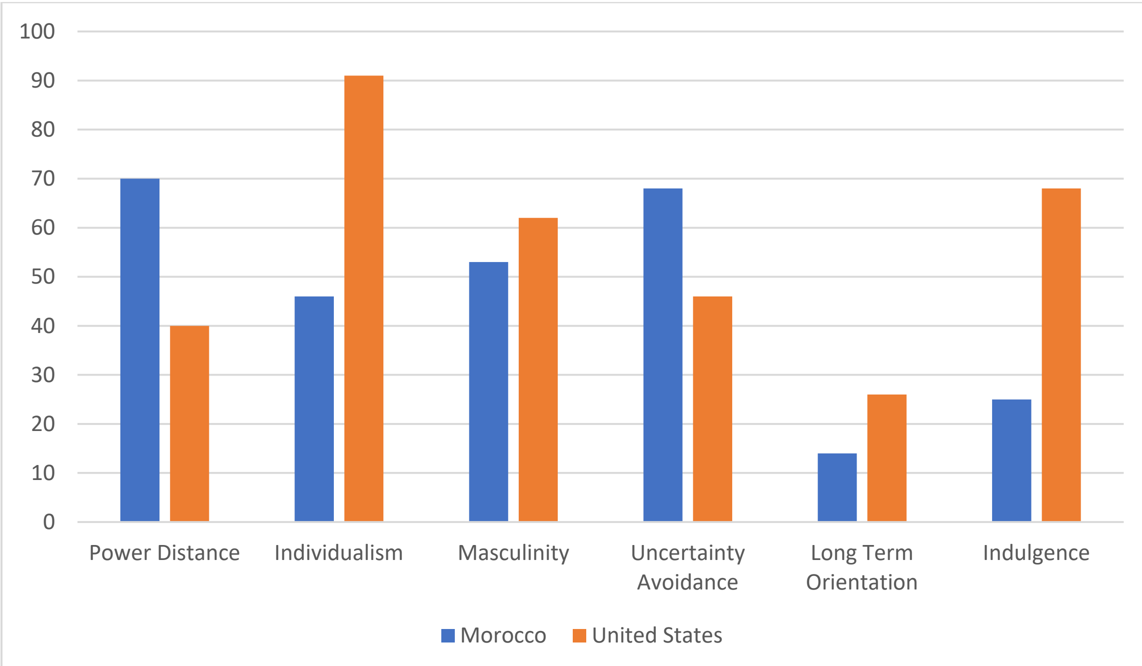

Figure 2. Comparison of cultural dimensions between Morocco and the United States. Figure generated December 15, 2018 at https://www.hofstede-insights.com/country-comparison/morocco,the-usa/.

There are obvious disparities in the dimensions of Power Distance, Individualism, Uncertainty Avoidance and Indulgence. Only mild differences, less than 10 points, exist between Morocco and the United States in terms of Masculinity and Long-term Orientation. A brief discussion of the four dimensions where there is significant disparity follows. These dimensions are highlighted because they may have implications for the conflicts, or misunderstanding of cultural dynamics, during the establishment and/or expansion of the business.

Power Distance is a factor related to the basic condition of human inequality. In countries with high Power Distance, like Morocco, lower ranking individuals of a society expect that power is distributed unequally; whereas in countries with low Power Distance, such as the

United States, there is less of an acceptance by individuals in a society to accept power inequality. Table 2 illustrates some differences between societies with large and small power distance (Hofstede, Hofstede, and Minkov (2010).

Table 2

Differences Between Small and Large Power Distance Societies

Topic	Small Power Distance	Large Power Distance
Use of power	Legitimate and examined by definition of good and evil	Legitimacy is irrelevant, a basic fact of society
Role of elders	Elders are neither respected nor feared	Elders are respected and feared
Hierarchy	Inequality of roles established for convenience	Existential inequality
Role of subordinates	Subordinates expect to be consulted	Subordinates expect to be told what to do

The Individualism versus Collectivism dimension refers to the integration of individuals into primary group cultures and varies on the amount of emphasis they place on individuality / uniqueness or on conformity and interdependence. According to Figure 2, the United States places value on unique individual expression, and has a score above 90. In turn, Morocco has a score less than 50.

Uncertainty Avoidance is related to the level of stress in a society in the face of an unknown future. It invests in rules and order to insure a level of stability. This dimension refers to the degree to which people in a country prefer structured over unstructured situations. A country with a high uncertainty avoidance, like Morocco with an approximate of score of 70, shows that the society has combatted levels of anxiety about uncertainty with strict societal rules and expectations. The United States scores at a mid-range of 45. This indicates that the level of anxiety about uncertainty has been mitigated by society in the institutionalization of laws and procedures.

The fourth dimension where there is a significant difference between the two countries is the Indulgence dimension. This indicator measures the extent to which people try to control their desires and impulses. A higher score means a culture is indulgent, like the United States with a score right below 70; while a lower score indicates a higher restraint, like Morocco, with a score just below 20.

The other dimensions, such as Masculinity versus Femininity, which related to emotional roles between women and men, and Long-Term versus Short-Term Orientation, which related to the choice of focus for people's efforts for the future (Hofstede, 2011) are similar for the United States and Morocco. Both are high for Masculinity and both are low for Long Term Orientation.

Morocco is governed by a parliamentary constitutional monarchy form of government. Its ruler is His Majesty the King, Mohammed VI, a descendent of the Alaouite Dynasty. The King of Morocco, Mohammed VI, ascended to the throne in 1999 at the age of 36 after the death of his 70-year-old father, His Majesty the King Hassan II.

The parliamentary constitutional monarchy system of rule integrates the religious field at both symbolic and institutional levels. It leaves the line between the king, as supreme religious and political figure, and the state intentionally blurred. This blend has existed since the pre-colonial period. Moroccan rulers, Mohammed V and, later, his son Hassan II, father of the present King Mohamed VI, displayed their sharifian descent from the Prophet Mohamed. This is why they take the title *amir almu'imineen,* or Commander of the Faithful (Wyrtzen, 2018).

The fusion of religion, the monarchy, and the nation was cemented in Article 19 of the Constitution of 1962. It is a constitutional, democratic, and social monarchy with Islam as the State religion and Arabic as its state language (Madani, Maghraoui, & Zerhouni, 2012).

During the protests for increased democratization beginning in 2011, King Mohammed VI responded swiftly by introducing a new constitution. It granted greater freedoms to Moroccan citizens and redistributed political power, although these have been criticized by activists and political analysts as mostly cosmetic (Benchemsi, 2012).

In general, the population is highly religious. In a study by the Pew Research Center on Religion and Public Life, of 1,474 respondents in Morocco, 98% believed in the one God and the Prophet (affirming *shahada,* or the Islamic creed declaring belief in monotheism and Muhammad's prophethood). It also reported that 89% of respondents affirmed religion as very important in their life. About 67% of respondents reported praying five times a day while 54% attend mosque at least once a week. Over a third, 39%, of respondents reported that they read the Qur’an once a day. Of all the respondents, 92% claimed to give alms (*zakat*) and 98% stated that they fast during Ramadan.

The principal setting for this study was Fez, and the secondary setting was Rabat, both in Morocco. Fez was founded in the 9th century and is home to the oldest university in the world, the University of Al-Qarawiyyin, which was built in 859 AD. It is a city with an ancient medina that is designated a United Nations Educational, Scientific and Cultural Organization (UNESCO) world heritage site complete with *madrasas, fondouks*, palaces, residences, mosques, and fountains that date to the 13th and 14th centuries under the Marinids. It also has modern sections, a reminder of the French influence, as well as present-day Fessi inspiration. Fez is regarded as the country's cultural and spiritual center.

Rabat was founded in the 12th century by the Almohad ruler Abd al-Mu'min as a military town and is now home to half a million residents. It is one of four Imperial cities of Morocco and the government and administrative center of the country. The medina of Rabat was listed as a World Heritage Site in 2012. It is home to the King’s Palace and many foreign embassies. Many infrastructure projects have been implemented in and around Rabat, such as the high speed rail between Casablanca and Tangier and the 12-mile tram system that crosses to neighboring Salé.

Setting

The school sites in Fez were located in the center of the modern part of the city, in the midst of urban expansion. During the study, the school was located on Trek Immouzzer and in 2018, moved to its fourth location. Both sites were conveniently located near the residences of the primarily middle-income families who attend the school. The school is a pre-K through Grade 12 school with an enrollment of approximately 240 students, a faculty of 25, and an administration staff of 25.

The American School Rabat was located in Soussi, the city center of Rabat. The first school site was a villa in a residential area in Soussi, the wealthiest neighborhood in Rabat and main site for embassies from around the world. The second location was a recently built business center, and the third location was an authorized school facility in a commercial section of Soussi. The school was a pre-K through Grade 4 school with an enrollment of 42 in September 2017. By June 2018, only 20 students were enrolled. There was a faculty of eight teachers and assistants, and five staff members. At the end of the school year, there was a faculty of three teachers, two assistants, and three staff members. The American School Rabat closed at the end of the school year, on June 2018. The reasons for closing are explained in the Findings section.

Interviews and meetings were held in private homes, the Fez school, the Fez train station, and in cafés in Fez and Rabat.

Significance of Study

By conducting this case study, the literature on innovative entrepreneurship and effectuation theory has been amplified for two reasons. One is that there have been very few field studies that have examined effectuation theory situated in a cross-cultural, globalized economic activity in uncertain market conditions. The second reason is that by engaging study participants in the reflection process during the expansion of the enterprise, the case study reveals critical tenets of a practical framework that can be used in future venture creation and expansion entrepreneurial work. In this case study, we self- analyzed our decision-making processes and actions during the Rabat expansion to examine opportunities and threats to our school sites. This reflective process illuminated the threats we faced, options we explored or acted on, and the criteria we developed for decision-making and action. The knowledge gained through the second phase of research effort formed a framework for initiating new school sites and/or addressing obstacles in future projects or entrepreneurship initiatives.

In Chapter 2, I explore the concept of effectuation logic of thinking in comparison to causal logic of thinking, critiques of effectuation logic of thinking, tenets of social embeddedness of entrepreneurship, and notions of innovative entrepreneurship. Chapter 3 describes the research methods used to collect and analyze the data, while the findings are reported in Chapter 4. In the final chapter, I weave the findings based on the experiences of an entrepreneur and the expansion team in the establishment and expansion of the private schools with the theories presented in Chapter 2 and other relevant research.

Chapter 2: Review of the Literature

The purpose of this chapter is to explore the key constructs of the entrepreneur and innovative entrepreneurship, describe effectuation theory as a logic of entrepreneurial thinking within a broader frame of entrepreneurial systems, and explore notions around the social and cultural embeddedness of entrepreneurship. I have organized the review by first explaining the origins of entrepreneurship and the importance of entrepreneurial orientation, because my study focused on understanding how the entrepreneur acts and reacts in the creation of a business. The second part of this review is a description of the principles of effectuation, in opposition to causal thinking, and critiques of the theory that have surfaced in the last several years. The final section presents recent calls for understanding entrepreneurship as a socially and culturally situated activity. This is relevant to this case study because it occurred in an international setting.

The Evolution of the Entrepreneur and Innovative Entrepreneurship

Dew, Ramesh, Read, Sarasvathy, and Virginia (2018) posit that empirical research on entrepreneurship flourished in the 1980s, although foundational works had been published earlier. Knight (1921), Schumpeter (1934), and Cantillion (1959) led the debate about the existence and nature of entrepreneurship. Cantillion (1959) suggested that risk is the foundational feature of the entrepreneur, while Knight (1921) focused on the economic activity created as a result of entrepreneurial activity. He also articulated the difference between risk and uncertainty, arguing that risk is unknown, but the rules of probability governing the situation, such as maximizing expected utility, are known. With uncertainty, neither the risk nor the rules governing the risk are known. The work of Schumpeter (1934) is most relevant to this study because entrepreneurship is described by Christopher Freeman (2009) as an evolutionary process of continuous innovation. The process and the actor are engaged in dynamic and fluid movement and conceptuality, most like effectuation theory.

Schumpeter (1934) described an entrepreneur as a heroic actor who breaks social traditions and norms, creates innovative services or products, and builds economic opportunities on a large scale. He posited that this person builds an industry by attracting imitators, who in turn improve the product or service by examining market niches and using more cost-effective measures. He coined the term “creative destruction” which he describes as a willingness and capacity to rupture the existing economic conditions. He saw innovative entrepreneurs as distinguished by their capacity and inclination to search for and create new commercial opportunities. “Schumpeterian entrepreneurs” according to Block, Fisch, and Van Praag (2017), exist in vibrant, active economies characterized by a continuous birth and death of firms. Entrepreneurs create and sustain this revitalizing process by transforming new ideas into marketable products and services (Acs et al., 2009; Block, Thurik, & Zhou 2013).

In the section entitled Economic Development and Entrepreneurship in his book *The Theory of Economic Development,* Schumpter (1934) dove deeper into the psyche of the entrepreneur and attempted “to understand human behavior, by analyzing the characteristic motives of his [the entrepreneur’s] conduct” (p. 90). He declared that one motive of the entrepreneur is that “there is the dream and the will to establish a private kingdom, usually, though not necessarily, also a dynasty” (p. 93). Another motive for the entrepreneur is that “there is the will to conquer: the impulse to fight, to prove oneself superior to others, to succeed for the sake, not of the fruits of success, but of success itself… [where] economic action becomes akin to sport” (p. 93). The third motive he offered is that for the entrepreneur “there is the joy of creating, of getting things done, or simply of exercising one’s energy and ingenuity” (p. 93). It has been important to consider these motives over the course of this study and also stay open to other motivations expressed by the entrepreneur and the expansion team.

More recently, Gartner and Birley (2002) described the entrepreneur as a person who first identified a need, designed a product or service, and gathered resources for mass production of said product or service. They insisted that the scale of the mass production necessitated building an organization, and ultimately, after imitators saturated the industry, government and industry experts interceded to develop regulations and policies.

Block et al. (2017) added that “innovative entrepreneurs often operate in emerging markets or challenge existing firms in established markets” (p. 64). They claim that nascent or unexplored geographies or locations promote different types of (competitive) behavior or strategies than other entrepreneurs or other types of start-ups (Samuelsson & Davidsson, 2009). These behaviors are critical when applied to business ventures because entrepreneurial actors are faced with productive activity in the future tense and opportunities in the present tense in the creation of new practices or situations (Covin & Slevin, 1991; Jones & Holt, 2008).

According to Shane (2003), for the most part, innovative entrepreneurship originated from a nexus of individuals and opportunities. Research has spanned the spectrum of the definition of innovative entrepreneurship. Acs et al. (2009) proposed that innovative entrepreneurship is more likely to develop with knowledge-based, technology-based, or research-driven opportunities. Koellinger (2008) concluded that innovative entrepreneurship flourishes if entrepreneurs possessed some socio-economic and personality characteristics such as academic and technical education. Other research arms have examined individual characteristics, environmental conditions, and accessibility to resources from associates, alliances, and networks (Elfring & Hulsink, 2003).

Start-up entrepreneurs make decisions that may define and shape their venture's progression (Aldrich, 1999). Studying the nature of cognitive differences of how they make these decisions is important for entrepreneurship research (Grégoire, Corbett, & McMullen, 2011; Shepherd, Williams, & Patzelt, 2015).

Growing evidence shows that decision-making by nonexperts, or novice entrepreneurs, favors effectuation behaviors when developing their nascent endeavors (Brettel, Mauer, Engelen, & Küpper, 2012; Engel, Dimitrova, Khapova, & Elfring., 2014).

Effectuation Theory as a Logic of Thinking

Behavioral economics explores the theme of being entrepreneurial, and specifically how the entrepreneur expresses herself in the development of an enterprise. Behavior economics is the study of how people behave in decision-making situations and how their choices can be improved. The purpose is to improve or maximize the welfare of concern for society (Reisch & Zhao, 2017) based on two aspects. The first aspect is on what are referred to as decision heuristics and biases on the part of consumers, according to Thaler and Sunstein (2008), the second is based on the specific effect of the situation or decision context.

Behavioral economics is a critical method for advancing an understanding of the decision-making strategies of the entrepreneur. Entrepreneurs often create firms in the absence of markets (Shane & Venkataraman, 2000), but if much of the information needed to create a firm did not exist, the effort was difficult. The initiation of a firm or industry is what creates the information, so establishing a firm without prior understanding became a critical and tenuous phenomenon (Arrow, 1994).

Within the umbrella of behavior economics is the study of entrepreneurial behavior, which attempts to explain what entrepreneurs do and how they embrace the entrepreneurial process (Fisher, 2012). The center of effectuation theory is that the nature of the entrepreneurial context is comprised of three key elements: Knightian uncertainty, goal ambiguity, and isotropy (Sarasvathy, 2008). Entrepreneurs cannot predict the future and develop firm goals in such fluctuating settings, so entrepreneurs define their goals based on interactions between means, markets, and stakeholders in the venture-creation period (Read, Song, & Smit, 2009; Sarasvathy & Dew, 2005; Wiltbank, Dew, Read, & Sarasvathy, 2006). The effectual decision-making process is defined as an iterative process that includes searching, experimenting, and adjusting, given the entrepreneurial environment of goal ambiguity, uncertainty, and the availability of scarce resources.

Sarasvathy (2001) proposed effectuation as the dominant decision model for how this particular set of entrepreneurs act during this exploratory phase of entrepreneurship, specifically in the absence of pre-existent markets. Lerner, Hunt, and Dimov (2018) opine that when the future is unpredictable, effectuation represents an intendedly rational, rule-directed way of proceeding.

Kerr & Coviello (2019) summarize as follows:

> Its principles convey that effectual process are: (i) driven by means available to an entrepreneur rather than predictable ends; (ii) built on a philosophy of partnership and pre-commitments; (iii) focused on human agency co-creating opportunities; (iv) characterized by experimentation within the constraints of what one can afford to lose; and (v) flexible enough to embrace contingencies. (p. 371)

Sarasvathy's (2001) work in effectuation theory has had a major impact on the mechanics of understanding entrepreneurship. The principles she and her colleagues have articulated form a significant part of the analysis in this study. I have attempted to understand the entrepreneur's cognitive processes and strategies in the establishment of the venture in a developing country. Taylor (2013) and Zahra (2005) explored cognitive psychology and behavioral economics to explain the types of reasoning processes that individuals draw upon and apply to their experience in new situations to make sense of the uncertain, novel, and complex situations encountered during internationalization. That research was important as I attempted to answer the study's research question regarding how the entrepreneur's cognitive processes and strategies contributed to the creation and expansion of an educational business venture.

Jones and Casulli (2014) advocated heuristic reasoning and analogical reasoning approaches, which have advanced international entrepreneurship research. Conversely, Sarasvathy (2001) and Baker, Miner, and Eesley (2003) suggested that entrepreneurs use a set of effectuation heuristics (Read, et al., 2009; Sarasvathy & Dew, 2005; Wiltbank, Read, Dew, & Sarasvathy, 2009).

Causal Thinking

Most business schools teach causal thinking as a method for establishing a firm, according to Sarasvathy (2001). Causal thinking is described as managerial thinking because it is based on a controlling nature of the practice, such as selecting a method for achieving a goal. Effectual thinking is described as entrepreneurial thinking due to the creative nature of the results. These are grounded on existing conditions and given a set of means available (Sarasvathy & Dew, 2005; Wiltbanket al., 2009). Sarasvathy (2001) summarized:

> Causal reasoning is based on the logic, *To the extent that we can predict the future, we can control it.* That is why both academics and practitioners in business today spend enormous amounts of brainpower and resources on developing predictive models. Effectual reasoning, however, is based on the logic, *To the extent that we can control the future*, *we do not need to predict it*. (p .6)

The quote explains the basic premise that causal reasoning begins with a goal in mind. The entrepreneur then goes about the process of selecting the human resources (employees, managers, etc.) that will help achieve the goal. They gather the financial resources needed to reach the goal and examine the market (competition, price points, demographics of customers among them) to enter in the most efficient manner. In turn, effectuation reasoning begins with an inventory of resources (human, financial and social) that shapes the outcome that becomes the business.

Causation logic is described as a deductive reasoning approach in which a goal is articulated, then the research is conducted for competition and market analysis, and lastly, the expected return on investment is calculated in advance of implementation. Human, financial and logic resources are assembled for launching an enterprise.

Conversely, effectual logic is grounded in decision-making options based on uncertain market conditions, with an unexamined and unknown future return on investment, and a fluid interaction of resources known and unknown to the entrepreneur with ambiguous or tentative business goals (Sarasvathay, 2001; Wiltbank et al., 2006).

Effectuation logic is defined as both a process of concurrent cycles of constraining goals and acquiring means, as well as a set of heuristic behaviors by self-selected associates who employ five principles: agency of the entrepreneur, means orientation, affordable loss, building partnerships, and leveraging contingencies (Read, Sarasvathy, Dew & Wiltbank, 2016). Research supports the use of Effectuation heuristics by expert entrepreneurs (Sarasvathy & Dew, 2005; Read, et al., 2009; Wiltbank et al., 2009).

The effectuation approach to entrepreneurship is fundamentally based on non-predictive control as opposed to the use of predictive tools that forecast results. It uses means within the person’s control as the determinant for action and requires few to no predictions about future return on investment. Effectuation is embodied in the principle of control over prediction and as such, is especially applicable in situations of unpredictability, such as when new ventures are formed (Knight, 1921; Sarasvathy & Dew, 2005).

Sarasvathy (2001) drew these principles from a seminal study to understand what makes entrepreneurs entrepreneurial and after interviewing and videotaping over 30 expert entrepreneurs who had established companies ranging in size from U.S. $200 million to U.S. $6.5 billion. Companies ranged from steel and railroad manufacturers and teddy bear manufacturers to semiconductor and bio-technology companies (Sarasvathy, 2001).

The purpose of the study was to analyze entrepreneurs' responses of how they approached specific problems in the development of an idea into a formidable firm. The entrepreneurs in the study reasoned their way through a 17-page problem set over two hours. They talked aloud as they solved 10 decision problems around starting a company, beginning with the same product idea. The tapes were transcribed, analyzed, and coded. Sarasvathy (2001) found that 65% of the respondents used effectual logic 75% of the time. The descriptors of the heuristics used by the entrepreneurs resulted in five pedagogically appropriate principles (Sarasvathy, 2001). Sarasvathy (2001) claimed that, as a coherent body, these principles constituted "a distinct form of rationality that we have all long recognized intuitively as 'entrepreneurial' " (p. 2).

For the sake of practical and pedagogical applications, the overall logic of effectuation has since been essentialized into five principles: means orientation, affordable loss, strategic partnerships, leveraging contingencies, and entrepreneur agency (Sarasvathy, 2008). Means orientation is a foundational element to effectual thinking in entrepreneurship, as it begins with the most important actor, the entrepreneur. The entrepreneur begins with an inventory of inherent resources, such as examination of personal traits and identity (who I am), experiences, skills and knowledge (what I know), and network of people, such as friends, colleagues, experts (who I know).

In terms of an approach, the entrepreneurial question “what can I do?” is based on the means at hand rather than “what should I do?” based on a futuristic analysis of what “should” happen or be done. The means-based approach relies on identity, knowledge/experience, and networks presently available to generate budding opportunities.

Causal and effectual logic are inherent parts of human reasoning. Research was conducted to understand to what extent means-based logic is used. Read et al. (2009), in a meta-analysis of studies, found a significant and positive correlation between means-based logic and new-venture performance. Means-based logic was measured via concepts such as resource-based capabilities, the active number of years in the specific industry, and the scope and reach of networks. The findings suggest that effectuation encourages entrepreneurs to be acutely aware of looming possibilities and their own integral capabilities, thereby relying on means and not outcomes.

Similar findings were echoed in a study by Fischer and Rueber (2011), in which they found that active engagement in social interactions can create or unveil cognitions regarding the means available to the entrepreneur, and the effect possible given those resources. Expert entrepreneurs will, to temper the effects of uncertainty, focus on their ability to create a new market, rather than attempt to predict the ways that they will impact the existing market or firm’s growth (Blume & Covin, 2011; McKelvie, Haynie, & Gustavsson, 2011).

Affordable loss is another critical element in effectual thinking in the area of finance. It forms the threshold of what cost is acceptable for an entrepreneur. Opportunities and changes are measured and assessed by the margin of error, so to speak.

By focusing on what the entrepreneur is prepared to lose, the need to predict future returns is eliminated. This implies the entrepreneur spends less time and energy planning and testing. The use of the affordable loss principle in research and development projects leads to higher efficiency (Brettel et al., 2012). According to Sarasvathy and Dew (2005), affordable loss can be calculated relatively quickly because the entrepreneur knows her means well and can estimate the amount of investment that can be spent without dire consequences. Chandler, DeTienne, McKelvie, & Mumford (2011) developed and validated measures of causation and effectuation approaches to new venture creation and tested them on young firms. As initially proposed by Sarasvathy (2001), the empirical research supported the idea that causation is negatively associated with uncertainty, while experimentation, an element of effectuation, is positively correlated with uncertainty.

The strategic partnership principle encourages a crazy quilt or a patchwork of personalities, relationships, industries, and networks to create a multitude of solutions in the absence of stratified designations. In this principle of effectual reasoning, the focus is on building partnerships for development as opposed to conducting a systematic competitive analysis for carving a unique niche within an existing industry. By nature, an entrepreneur is embarking on an endeavor, so partnerships and alliances are a particularly effective way to support the nascent effort and share the burden of risk (Sarasvathy, 2001).

Effectual logic is particularly useful and effective in understanding domains such as the introduction of new products in new markets. The intersection of new product and new market is referred to as the suicide quadrant, where traditional marketing techniques are ineffective because they are risk-heavy (Sarasvathy, 2003, p. 206.). Because effectual logic is people-dependent, unlike causal logic, which is effect-dependent, the networks can absorb the risk. In other words, when a goal is selected, such as a target segment within an existing market, the people hired and partners selected will depend on the effect desired or the market entered. Effectual logic, however, does not assume pre-existing markets, and builds on the idea that the markets created will be predicated on the network of human resources an entrepreneur brings together. In this way, markets become assemblages of critical groups who come together to "transform the outputs of human imagination into the forging and fulfillment of human aspirations through economic means" (Sarasvathy, 2001, p. 7).

The leverage contingencies principle is a reference to the popular adage, "when life gives you lemons [which are sour and perceived as unfavorable], make lemonade." In the vernacular, the adage refers to taking advantage of unfavorable situations or unintended outcomes. The principle is founded on the uncertain nature of establishing a company, in which the entrepreneur leverages contingencies that arise in the formation or start-up of a company. It is the strategic response to and interaction with events, time, and situations that can be utilized to benefit the evolution of a firm. It implies that a person must maintain a high level of flexibility and embrace uncertainty.

The entrepreneur agency principle, also known as pilot-in-the-plane, places the focus of control on the entrepreneur. The activity of the business is constructed and engineered by the drive and resiliency of the entrepreneur, as opposed to planning future gains and activities with a predictable outcome.

Brinckmann, Grichnik, and Kapsa (2010) found that in cultures with high levels of uncertainty avoidance, the benefit of business planning, as is inherent in causal reasoning, is significantly reduced. Thus, culture and, more specifically, socio-cultural factors influence the nascent entrepreneurial process. In their review of literature focused on the examination of the social and cultural factors involved in entrepreneurial activity, Thornton, Ribeiro-Soriano, and Urbano (2011) echoed what Zimmer (1986) argued: that entrepreneurship is embedded in a social context, but "the influence of social and cultural factors on enterprise development remains under studied" (p. 105).

Sarasvathy (2001, 2008) challenged and shaped a departure from the causal logic of business to form four, then later, five, fledgling principles on effectual entrepreneurship logic that have implications for international entrepreneurship in terms of: generalizability for various types of organizations, counterfactual analysis as a method for deepening understanding of entrepreneurship processes, intersubjectivity as a unit of analysis of entrepreneurship (as opposed to a subjective-intersubjective-objective triad), and transnational and post-national ventures as sites for study (Sarasvathy, Kumar, York, & Bhagavatula, 2014). It is the fourth implication that promoted the need for this study.

Because effectuation is based on the premise that the locus of control resides within the actor or stakeholder, prediction of future outcomes is not necessary. Where unpredictable business conditions exist, new ventures are found (Knight, 1921; Sarasvathy & Dew, 2013), further pressing the argument for the need to understand the recent phenomenon of international entrepreneurship.

Recent critiques of effectuation theory pointed to its lack of rigor as a theory due to its limited testing, its skewed data sample of the initial study, and its absence in field studies (Arend et al., 2015). Arend et al. (2015) made recommendations regarding directions which would enrich the body of knowledge. Of relevance to this study is the suggestion that future studies on effectuation theory need to provide a multi-dimensional presence of external parties that affect the outcomes and provide a better understanding of the roles of parties, such as co-creators, rivals, institutions, and other entities with whom the entrepreneur engages. As the case study description shows in Chapter 3, the interactions of the various parties working collaboratively with the entrepreneurs are included.

Theories for Study

The reflections of “social embeddedness” of the entrepreneurial processes and activities (causal, effectual, and other logic of thinking) has informed American School's expansion and the analysis of its market emergence behavior or activities in the management of cross-border or cross-site uncertainty, institutional resources, and network dynamics. Importantly, we discovered nuances in the socio-cultural environment that have been unarticulated and, therefore, under-utilized in capitalizing on the market niche in the geopolitical area of Morocco.

Life histories, work experiences, international living, and entrepreneurial orientation impact the internationalization process and success of the American School, but it is the fluidity and context of the macro-economic forces and political trends that made the expansion of the school to other cities in Morocco possible. Additionally, examination of the micro-dynamics of the initial business strategies contributed to the growth stage.

Having lived and worked at the American School and worked as a consultant to the entrepreneur/owner prior to this study, I had a sense that she would be an example of a person who uses effectuation processes in her venture creation and expansion. A pivotal participant in this story, M. Forciea has a particular way of engaging people, gathering resources, and negotiating her multiple positions as an American, a foreigner, and a friend of Morocco. Certain cognitive, socio-cultural, and political elements in the formation of her venture have not been captured in the literature. Her positionality and that of members of the expansion team are depicted in the Findings chapter of this study. The findings regarding the positionality of the study participants address the research question about the strategies that helped or hindered the business, and these findings address the research questions.

As a transnational entrepreneur, I have experienced, sometimes by choice and other times by necessity, the forces of effectuation logic by virtue of being in a foreign context and environment. These professional experiences are documented in the heuristic journaling method and add context as a reflexive piece to this study.

Chapter 3: Method of Inquiry

Epistemology of the Study

This study of the American School business, with two school sites, rests on the epistemological position of the constructivist perspective. Social construction (Berger & Luckmann, 1967; Lincoln, Lynham, & Guba, 2011) is an approach to qualitative research that privileges understanding, the contributions of multiple participants, social and historical contexts, and theory generation (Creswell, 2015). Social constructivists believe that people seek to understand and assign meaning to experiences in the world in which they live and work. These meanings are derived from multiple and complex impressions and understandings over time and space and it is the role of the researcher to transmit the complexity of the participants' view of the situation (Lincoln et al., 2011). These subjective meanings emerge from the social and historical interactions with others in their life settings or environments. In Phase One of this study, the focus was on the interactions between the entrepreneurs (the co-founders) and the people with whom they worked to establish the original school. In Phase Two, the focus was on the interactions between one entrepreneur (one of the original two co-founders) and the expansion team, in the expansion of the original school and operation of the second school. As a study with a constructivist perspective, the interactions amongst the individuals and the specific context in which they live are the nucleus of the research (Creswell, 2015).

Assumptions about the constructivist perspective are outlined by Crotty (1998) as the following:

1. Humans make meaning as they engage in the world, and the researcher uses open-ended question to elicit those meanings.

2. Human are born into a social and historical period that frames how we, as humans, interpret the meanings of those interactions or engagements. The researcher, given their own background, experience and mindset, interprets what they understand about the meanings shared by the participants.
3. Qualitative research is inductive and, due to its nature, the generation of meaning is based on the data collected from the community of the study.

Rationale for Method of Inquiry

The driving forces for the chosen system of inquiry were the purpose of the study, the goals of the study, and an appropriate way to answer the research questions. The purpose of the study was to explore and understand the cognitive processes within the central question of entrepreneurial behavior. A qualitative research method, an inductive approach, was chosen to permit this researcher to best answer the research questions (Creswell & Creswell, 2017) about effectual logic and other cognitive processes, to address what impact this logic had on the business, and to understand how this knowledge might contribute to the future expansion of the venture. This case study will allow ample space to explore the details of the experience of business creation and expansion.

Qualitative research relies primarily on an inductive model of reason and as such assigns privilege to exploration and discovery (Merriam & Tisdell, 2015). Qualitative research allows the voices and stories of the study participants to emerge. Merriam (2002) contended:

> Qualitative research lies with the idea that meaning is socially constructed by individuals in interaction with their world. The world, or reality, is not the fixed, single, agreed upon, or measurable phenomenon that it is assumed to be in positivist, quantitative research. (p. 3)

Since the purpose of this study was to understand how a person operated within layered geographical, social, and cultural spheres, it necessitated a research approach that prioritized human interactions, perceptions, personal motivations, and socio-cultural contexts. The nature of qualitative research lent itself to the research goal, because qualitative research "lies with the idea that meaning is socially constructed by individuals in interaction with their worlds" (Merriam, 2002, p. 3)

Methodology

Research designs, or types of inquiry within the research approach, allow or inform a specific direction for the procedures. The study combined narrative inquiry research design as defined by Clandinin and Connelly (2000), case study research as described by Stake (1995) and heuristic inquiry proposed by Moustakas (1990, 1994). The citations point to the original and seminal sources of the research designs used in this study and was later complemented by more recent methods developed by the same authors, or additional writing on the three research designs by derivative authors and works.

This case study with narrative inquiry and heuristic inquiry design explored if and how the entrepreneurs used the principles related to effectuation theory when they founded the first school, and how these and other cognitive processes and enactments were expressed in the establishment of a new campus at a second location. Extensive interviews with the entrepreneurs and review of archival and personal written sources helped us to understand and identify their entrepreneurial decision-making processes and strategies. Recorded expansion team sessions, numerous research journals, and related activities with the entrepreneur and members of the expansion team reflected the entrepreneurial decision-making processes being employed at the time of expansion. Transcriptions of the interviews and team sessions, as well as journal entries, formed the bulk of what was analyzed using narrative analysis, the method for dissecting and understanding the data, and presented as findings via story structures. Categories were sifted and elevated into broader, largely synthesized bodies called themes. Themes are essential concepts of entrepreneurial thinking and are situated within the current research literature. The data analysis simultaneously contributed to the Design Plan, a model based on what was learned, for use with subsequent business ventures.

Case study. Case study research design meets the goal of this study and focuses on one singular case: the entrepreneur and the expansion team acting within a socio-cultural context, and the generation of knowledge through entrepreneurial action. The choice to conduct a case study can be framed, not as a methodological decision, but as "a choice about what is to be studied" (Stake, 2005, p. 443).

The case study was cast as both intrinsic and instrumental. The intrinsic nature of the study came from the intricacies of the stories of the entrepreneur, associates, and expansion team and the complex and unique nature of the setting. The instrumental aspect arose from an inherent interest to identify processes and behaviors of the study participants in the planning exercises in order to formulate a framework that could be useful for the creation of a particular model of expansion.

Intrinsic case studies help to understand what can be learned by examining a case, not for generalizing what is learned (Stake, 2005). Intrinsic case studies are undertaken to understand the "particularity and ordinariness" of a case (Stake, 2005). In investigating the in-depth decision-making processes of the entrepreneur in the first part of the study and those of the entrepreneur and the expansion team in the second part of the study, I explored the unique nature of the co-creation of experiential knowledge of this case.

The purpose of an instrumental case study is to provide insight into an issue or to construct an alternative generalization (Stake, 2005). I used what was gained from the interviews with the entrepreneur and expansion team to pursue an external interest and engage with effectuation theory. Grandy (2012) described instrumental case studies where the topic is more likely to be known in advance and the study designed around established theory or methods. By framing the open-ended interview questions around the entrepreneurial processes, the responses shed some light on how effectuation theory manifested in field-based situations. Additionally, the responses formed findings and themes that molded a framework for entrepreneurial behavior, which could be applied in future business ventures.

The first part of the study consisted primarily of semi-structured interviews with the entrepreneur and associates who worked with her to establish the first school. In the second part of the study, the entrepreneur, the expansion team, and the researcher engaged in planning sessions and activities for the purpose of identifying the collective cognitive processes and strategies used in the operation of the new school. A narrative analysis method, using linguistic coding systems, was used to interpret stories and develop practices into categories and, later, themes.

Narrative analysis. Narrative inquiry, described by Clandinin and Connelly (2000), is primarily a methodology developed to describe the personal stories of teachers with the aim of understanding then-present real-life experiences through the stories of the research participants. The narrative approach allows for a rich description of these experiences and an exploration of the meanings that the participants derive from their experiences. Narrative inquiry research design is a type of design in which the researcher bases their data and interpretation on the observations of people’s lives and stories generated by one or two individuals about their lives (Riessman, 2008).

Narrative analysis as method utilizes storytelling as a way of communicating the participants' realities to a larger audience (Clandinin, 2006). Researchers can access and sculpt rich layers of in-depth information to illuminate an understanding of the particulars of the participants' points of view. By formatting narratives or stories in the presentation of findings, the reader gains a deeper understanding of the subject material and the researcher's insight. These insights are meant to be applied to the stories of the readers' own context because the underlying idea is to access real people in real settings through the "painting" of their stories (Cortazzi, 2014)

Narrative analysis was selected as the method for understanding the data in this study because it can incorporate a variety of approaches (Esin, Fathi, & Squire, 2014). In this case study, the narrative analysis method incorporates a constructivist approach and a psychological approach.

The narrative analysis constructionist approach generally utilizes the story as the analytical unit to gain understanding and is more concerned with stories as social events, or the social function of a story. By selecting a story as the unit by which we interpret the data, we encapsulate the different levels of context, from the mini-processes of cognition of the theory of effectuation to the broader socio-cultural and historical context that frames the participant-generated stories. Esin et al. (2014) describe this process:

> The constructionist approach to narrative analysis may focus on the linguistic minutiae of the co-construction of a story between speaker and listener, but usually it also takes into account the broader social construction of that story within interpersonal, social and cultural relations. (p. 3)

A narrative analysis with a psychological approach is a meaning-making technique that "emphasizes inductive processes, contextualized knowledge, and human intention…. It is holistic in that it acknowledges the cognitive, affective and motivational dimensions of meaning-making. It also considers the biological and environmental influences in development" (Rossiter, 1999, p. 78).

This approach was the most appropriate approach for this study because it centered around a person's thought processes and took into consideration the aspects of a person's life, the social, cultural, and political dimensions. In this regard, this approach helped the researcher understand how those elements informed the central question of entrepreneurial processes in both phases of the study.

Data analysis procedures. ***Free-textual analysis.*** Smith (2015) stresses the importance of developing an analytical frame for encapsulating the narrative accounts. The technique he prescribes for the initial readings of the text is a free textual analysis, where the researcher reads and re-reads the transcript and uses the left-side of the margin to jot down anything interesting or significant about what is said. This is similar to the first round of open-ended coding, a general read-through of "first impression" phrases called eclectic coding (Saldaña, 2015).

Types of cases. The second layer of analysis was the selection of pragmatic cases and episodic cases. This was relevant to the data analysis because the research questions beg attention to the meaning-making of stories regarding the school in the early years and in the recent period.

Pragmatic cases are identified because they illustrate the central theme or theory being explored in the study (Becker, 1996). In his discussion about the proximity between quantitative and qualitative paradigms, Becker (1996) argues that epistemologically, qualitative methods ought not to assign the viewpoint of the participant but instead share ideas and experiences of the participants, if we are to understand the motives and reasons behind their actions. To that end, pragmatic cases are a method in data analysis that reveal the meaning people assign to their everyday world and everyday life.

Episodic examples are instances in which a narrator is told a story about particular experiences that changed or disrupted the person's life or understanding (Flick, 2002). Episodic knowledge cases are stories of a subject's experiences of theme and are stored, recalled, and organized because they associate with concrete situations and circumstances. The incident is remembered based on the course of the situation in its context and serves as the main unit around which knowledge is organized (Flick, 2009).

Because the interview is constituted over a complex interaction between responses (Mishler, 1986), it lends itself to collaborative meaning-making rather than an imposition or reaction of the interviewer's or interviewee's category of meanings. Member-checking sessions contributed to a deeper understanding of the experiences. These notations were a source of data as well.

Coding. In the third level of analysis, the researcher began coding the pragmatic and episodic cases using the lens of the five principles of effectuation theory. This took into consideration free textual markings of the initial read, journal entries of participants and the researcher over the course of the data collection, and heuristic markings or insights gathered during the member-checking instances. A code in qualitative inquiry "is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data" (Saldaña, 2015, p. 4).

Saldaña (2015) posits that coding "is not a precise science; it is primarily an interpretive act" and adds that a code can "sometimes summarize, distill, or condense data, not simply reduce them" (p. 5). Most descriptions of the purpose of a code are that it allows researcher to generate a construct or symbol which "translates" data (Vogt, Vogt, Gardner, & Haeffele, 2014). The attributes of codes, or code sets, provide meaning in each individual datum for purposes of pattern detection, categorization, theory building, and other analytic processes. In this study, codes were used in the analysis of the stories generated by the participants. The types of codes are descriptive, process, and simultaneous.

A descriptive code summarizes the primary topic of the narrative by using the same superscript number in a transcription. An example of this is using the superscript number one to mark all the times the narrator refers to hiring Americans.

A process code is a word or phrase that captures and summarizes an action, like "lining up for lunch" or "playing sports."

A simultaneous code is used when two or more topics are found within a single datum, such as one story that reveals something about two topics. One story, or single datum, can reveal information about two topics, such as how much the person could afford to lose and about building partnerships (Saldaña, 2003, pp. 118-122).

Alvesson and Kärreman (2011), however, caution that too narrow a focus on codification for pattern making with qualitative data can oversimplify the analytic process and hamper rich theory development:

> Incoherencies, paradoxes, ambiguities, processes, and the like are certainly key aspects of social reality and worth exploring – both as topics in their own right and as a way of getting beyond premature pattern-fixing and the reproduction of taken-for-granted assumptions about specific patterns. (p. 42)

Through the free-textual notations, the researcher notes anomalies in the storytelling which lead to the inclusion of new categories of cognitive decision-making not outlined in effectuation theory. This discovery forces the investigator to question why the categories exist concurrently. This is a process called abductive analysis (Tavory & Timmermans, 2014), in which codes begin to form patterns and require a deeper interpretation for their existence in the larger social context of the study.

Certainly, my role as a researcher and as a participant-observer caused me to filter data into codes not otherwise included as principles of effectuation. This coding technique reflected possible lenses, filters, and angles I experienced during fieldwork and influenced how I perceived, documented, coded, and, ultimately, interpreted the data (Adler & Adler, 1987).

Sipe and Ghiso (2004) posit that "all coding is a judgment call" since we bring "our subjectivities, our personalities, our predispositions, [and] our quirks" to the process (pp. 482–3). Because this researcher knew the research questions at the outset of the study, I elicited stories that would inform the overall purpose of the study.

Research Protocol

Setting. Fez was founded as the capital of Morocco by the Idrisid dynasty between 789 and 808 A.D. The original town included two large fortified quarters separated by the Fez wadi, or river, on the banks of the Andalous and the Kaïrouanais. The dynasty of the Almohads ruled between the 12th and 13th centuries and by the Merinids from the 13th to 15th centuries. A new town called Fez Jedid was founded in 1276 to the west of the ancient one called Fez El-Bali (UNESCO, 1996). The Medina of Fez has a significant number of religious, civil, and military monuments that brought about a multi-cultural society, and is considered one of the best conserved historic towns of the Arab-Muslim world, as it still operates as a centerpiece of commerce and trade. Ville Nouvelle was founded by the French in 1912 and developed tremendously since Morocco gained independence in 1956. Modern architecture, Western-designed store fronts, wide streets and promenades, as well as gated residential units define this area.

Fez is a city of cultural, spiritual, and artisan tradition and significance. The Kaïrouine Mosque, the second-largest and one of the oldest in Morocco, was built in the Medina in the 9th century by Fatima al-Fihri, the daughter of a wealthy Tunisian. Its *madrasa* (Islamic college) is known to be one of the oldest continually functioning universities in the world.

The Madrasa Bou Inania is one of the few religious buildings non-Muslims can enter in Morocco. The Islamic school, founded in the 14th century by Sultan Abu Inan Faris, is beautifully decorated with intricate carvings and tile work all the way up to the top of its minaret. Directly across from the madrasa is the Dar al-Magana, a weight-powered water clock house also built by Sultan Abu Inan Faris.

Fez is a rapidly changing and complex city. While several texts explore the recent social and cultural trends in Fez, the following presents the findings of two ethnographic publications which essentialize the realities of present-day Fez.

In her year-long study about the pluralization of Islamic understanding by an American Muslim convert, Mulderig (2015) explored the notion of hypocrisy by examining the fluidity of Islamic subjectivities to contribute to the body of research about the transition women experience in the Arab world. She documented the lives of young women as they went about their religious and social lives and found the many ways that actions and systems of beliefs are contradictory and test traditional and modern social norms. In one of her loosely conclusive statements, she says:

> I have sought, like Schielke, to pull my imperfect informants from “the shadow of an image of Islam as a perfectionist project of self-discipline” …and to demonstrate the scholarly value in embracing the complexity and contested nature of my informants’ lives. The young women of Fez do not all seek to be perfectly pious, but many seek to find a balance in their lives between competing traditions of knowledge so that they can be as “good of Muslims” as they can. These continually negotiated understandings provide each woman with her own unique Islamic subjectivity, while also contributing to

> the overarching set of public norms about acceptable Islamic practice and ethical behavior. (pp. 284-285)

In Ouaknine-Yekutieli's (2015) historical and ethnographic study about the crisis around the artisan economy in Fez, he traced the relationship between the craft people's knowledge and the public narratives that are invented and shared to create a mosaic of ways to reflect their trade. His research focused on artisans working in the medina, about 50,000 workers who produce goods like shoes, clothes, pottery, furniture, wares of copper, silver, and gold, and other items. The sector employed 25% of the city's population and more than 75% of the medina's population. There were also 160,000 people living in the medina in a 300-hectare area, rendering it a highly dense population. After walking the reader through numerous historical accounts of how graciously crafts and crafts people are depicted, he introduced the opposing representations that manifests at about the same time that the country of Morocco became a French protectorate in 1912. This modern melancholy, he claims, is indicative of the colonizer's perception than begins to form in the consciousness of local artisans, for good and bad. Ouaknine-Yekutieli (2015) exemplified the mood by positing that

> saving the crafts has tended to involve improving and modernizing artisanal techniques, organizing craft corporations, searching new markets, improving product quality, and revamping vocational training. These schemes are consistent with the logic of colonial modernity by which old concepts, techniques, and objects are replaced with new ones that are claimed to be up-to-date, cleaner, and better. (p. 120)

In the final analysis, the script about the artisan crisis and the discourse around the calamity is described by Ouaknine-Yekutieli (2015) as follows:

> Whatever happens [i.e., even if tourism stops] the artisans will never die, because it is in your [the artisan's] hands. This statement integrates the practical and the symbolic; crafts are achievable with bare hands, ready to create objects, livelihood, and narratives, and exist deep within the human spirit. The specific telling of Fez combines the materiality of craftsmanship with intertextual reverberations of premodern philosophies, European discourses of enchantment and decadence, and contemporary Moroccan governmental economic plans. The artisans actively engage modernity while offering a premodern

> worldview based on solidarity, spirituality, compassion, and honor. It proposes a solution to the very crisis it declares. (pp. 124-125)

Known to the Sufis as the “Zaouia” (the sanctuary), Fez epitomized the nexus of the modern and traditional with conflicting and complex global and local commerce relationships, social, religious, and moral values, and political identity.

Mulderig (2015) and Ouaknine-Yekutieli (2015) present very recent ethnographic portraits of Fez, Morocco and their findings are included here to pointedly illustrate the complex cultural and social texture of Fez, the main site of this study.

The other site for this case study was Rabat, the capital of Morocco. Rabat is located on the coast of the Atlantic Ocean and is home to 621,480 inhabitants. It is situated about 170 miles south of Tangier, the northernmost city in North Africa, and 57 miles north of Casablanca. Rabat is adjacent to Salé, a city founded by the Zanātah Imazighen (Berbers) in the 10th century that was later occupied by Romans. It was founded in the 12th century by the first Almohad king, Abd al-Mu’min, as a fortified monastery and later, in the early 1600s, became a refuge for Spanish Moors ousted from Spain during the Spanish Inquisition (Kraemer, 2008)

Like Fez, it has a medina, a national library, and mid-century buildings built by the French in the modern era. Rabat is unique in that it has many national administrative centers, national museums, embassies, and international organization headquarters. King Mohammed VI lives in the royal palace in Rabat. The main economic drivers for Rabat-Salé are the sale of textiles and leather as well as the manufacture of bricks and asbestos.

Fez and Rabat-Salé are an intersection of modern and traditional life and as such, the economy and business landscape reflect that trend. This complex reality influenced how the entrepreneur and the expansion team frame and practice their strategies in building competitive ventures.

History of American School Fez and American School Rabat. Table 3 illustrates the events that occurred between 2001 and 2019. As previously mentioned, Phase One covers the inception period, 2001, to the period before the expansion team began exploring the possibility of opening a second campus, about 2015. Phase Two covers the exploration period, 2016, to the summer of 2019, a year after the American School Rabat closed.

Table 3

History of American School Fez and Rabat

	Phase One
2001-2004	Entrepreneurs and co-founders, a married couple named Jim Hasbrouck and Michelle Forciea, formerly known as Michelle Hasbrouck, lived in Austin, Texas. They prepared to open a school called the American School Fez in Fez, Morocco.
2004	In May, the co-founders, along with their two children, moved to Fez, Morocco. In September, with the assistance of Mr. and Mrs. Louali of Morocco, the Hasbroucks opened an elementary American school in Fez. In October, the co-founders learned about an alleged theft by Mrs. Louali.
2005	In January, co-founders dismissed Mrs. Louali from her position as School Director. In April, Ed Lozano of Austin, Texas, moved to Fez to serve as the School Principal. In June, the co-founders left Morocco to return to Austin, Texas.
2005-2009	The school grew and a secondary campus was added at a new school site.
2009	The Hasbrouck family returned to Fez.
2010	A language school, American School Language Institute, was added to respond to the non-American School students’ demand for English. The school relocated to a third school site to accommodate new students.
2014	Co-founder Jim Hasbrouck returned to Austin, Texas. Co-founder Michelle Forciea remained in Fez to operate and grow the school and language institute.

	Phase Two
2016	Co-founder Michelle Forciea and the American School Fez leadership team explored the possibility of opening a new American School in Rabat or Marrakesh. The group was known as the expansion team.
2017	In September, Michelle Forciea opened American School Rabat elementary school in Rabat. Ada A Gonzalez served as the principal. A competitor placed pressure on local authorities to close American School Rabat. The American School Rabat Business Manager introduced her college friend, the Prince, as a possible business partner. Between September and December, the school location changed three times. The first location was a luxury six-bedroom villa with a pool and garden area, the second location was the home of one of the students, and the third was the top floor of a business center.
2018	In January, the American School Rabat moved to its fourth location. The building was a former school building with six classrooms, a concrete courtyard, one office, and few bathrooms. The language school taught evening classes in this building. In February, there were threats of closure against American School Fez by a competitor from Rabat. In May, American School Fez moved to a new location. The business changed name. The owner of the Canadian school, Maple Bear, stated he was interested in working with Michelle Forciea to re-open a school campus in Rabat. In June, the American School Rabat closed. In August, Ada A Gonzalez moved to Fez and served as the principal at the American School Fez.
2019	In the Spring, the expansion team continued to seek authorization for the American School Rabat. The owner of Maple Bear re-introduced the idea of a partnership with Michelle Forciea. In July, after the 2018-2019 school year closed, Ada A Gonzalez returned to San Antonio, Texas. The American School Fez continued to explore authorization and partnership for American School Rabat.

The two co-founders, the principal, and three staff and faculty make up the interviewees in Phase One. One of the co-founders, M. Forciea, and four members of the leadership team, including myself comprised the participants in Phase Two of this study.

Participants. The participants in this study are American and Moroccan citizens who were actively involved in the operation of either or both of the two schools during the course of this study.

Table 4

Participants in Phases One and Two

Last name, First initial	Gender	Age	Highest level of formal education	Years associated with ASF
Forciea, M	Female	50s	Master's degree	15
Hasbrouck, J	Male	50s	Bachelor's	10
Lozano, E	Male	50s	Doctorate	5
Bensellam, M	Male	30s	High School diploma	15
Bensellam, N	Female	30s	High School diploma	13
Benyoucef, J	Female	60s	Master's degree	13
Semmar, H	Male	30s	Bachelor's degree	5
Olsen, A	Female	30s	Master's degree	3
El Yazami, A	Male	30s	Bachelor's degree	5
Self	Female	50s	Master's degree	4

Participant #1, the principal referent for this study, is an American woman in her early 50s named Michelle Forciea, who is both a certified educator in the State of Texas and the founder and director of the two schools called American School located in Fez and Rabat, Morocco. She is originally from Minnesota and graduated with bachelor's and master’s degrees from American universities. She worked as an English as a Second Language teacher in Hungary and a science teacher in Texas for a combination of 10 years. She met her husband in Hungary in the 1990s and they travelled extensively during their 20+ years of marriage, which ended in 2019. She has been the primary person responsible for the operation of the school in Fez over the course of its existence, and the owner and director of the school in Fez and the school in Rabat. She was selected as the principal referent participant because she had the exclusive capacity to explain in detail the intricacies of decision-making, motivations, and impetus about the ventures from inception to its fledgling existence and into the current expansion. She currently resides in Fez and is a fluent English and Arabic speaker.

Participant #2 is an American man named Jim Hasbrouck, who was the husband of M. Forciea from 1990 until 2019. A central Texan, he graduated from an American university and worked and invested in the technology industry in Austin, Texas. Together, he and Michelle founded the school in 2004 and collaborated closely with the Moroccan school director and late American principal at every stage of the venture's initial development, in an advisory role. Between the years of 2009 and 2012, he lived in Fez full-time and was the Business Manager for the school. Between 2012-2018, he moved back to reside in Austin, Texas, and traveled once or twice a year to Morocco.

Participant #3 is the first school principal, named Eduardo Lozano. He is an American school administrator of Mexican descent in his 50s who led the operation of the Fez school between 2005 to 2009. Eduardo is originally from Texas and received his bachelor's, master's and doctoral degrees from Texas universities. He is a fluent English and Spanish speaker and limited Arabic speaker, and currently resides in Austin, Texas.

Participant #4, Mourad Bensellam, is the first employee of the Fez school, a Moroccan man in his 40s. He attended Moroccan primary and secondary school and was employed first as a security guard for the school building and later as a sports teacher. Mourad is a limited English speaker and a fluent speaker of Arabic.

Participant #5, Najat Bensellam, is a Moroccan woman who came to work at the Fez school two years after it was founded. She began working as an assistant in the Maternelle (pre-Kindergarten) class and later became the secretary for the elementary school. She also attended Moroccan primary and secondary school and was studying at the local university when she came to work at the American school. Najat is a fluent speaker of English and Arabic.

Mourad and Najat are married and have two young children at the American school in Fez.

Participant #6, Johara Benyoucef, is a long-term teacher of French. She is in her 60s and is a fluent speaker of French, Arabic, and English. She attended private French primary and secondary school in Fez, Morocco, and studied design at a private university in France before coming to work at the Fez school when she was in her 40s.

Participants #1 through #6 were interviewed individually. The criteria for selection of the individual interview was based on a high level of involvement and knowledge of the history of the school.

Participant #7, Hicham Semmar, is a Moroccan man who is in his 30s and served as the Business Manager for both schools. He attended Moroccan elementary and secondary public school, American university in Hanover, Massachusetts, and lived and worked in America for seven years before moving back to Morocco with his young family. Hicham worked as a regional manager for a gas and convenience store company in America and owns a few auto repairs shops in Fez. He also teaches secondary math courses at the school in Fez. Hicham is a fluent speaker of English, French, and Arabic.

Participant #8, Ashley Olson, is an American educator who is in her 30s. She received her bachelor’s and master’s degrees in America and has taught theatre in various countries in Africa. She worked at the Fez school for three years, one as the vice-principal and two as the principal. She is a fluent English speaker and very limited Arabic speaker.

Participant #9, Aziz El Azami, is a Moroccan, 30-something year old male. He attended Moroccan public schools and graduated with a bachelor’s degree from a Moroccan university in integrated technology. He has worked in the IT department and taught computer classes for six years at the Fez school. Aziz is a fluent speaker of English, French, and Arabic.

Participant #10 is the researcher and author of the study. I am a 50-something year old American of Mexican descent who has bachelor's and master's degrees from American universities. I have taught in Texas public schools and worked with several non-profit organizations. I taught elementary school at the Fez school during the 2011-2012 academic year, developed the scope and sequence with K-12 teachers as a consultant in 2012, and served as the principal of the Rabat school during the 2017-2018 academic year. I am currently serving as the principal at the American school in Fez and am a fluent English and Spanish speaker and limited Arabic speaker.

Role of the researcher. As articulated previously, in qualitative research, the researcher is the primary instrument of data gathering and as such, I acknowledge biases and subjectivity, and accept a positive understanding of the complexity of human identity and interaction (Merriam & Grenier, 2019). Additionally, since the researcher is a primary instrument in the empirical research process, the researcher should be able to understand the problem, issues, and procedures, and, ultimately, construct a reality through narrative (Ary, Jacobs, Irvine, & Walker, 2018; Lichtman, 2013).

The benefit of the researcher as the primary instrument for data collection and analysis is that the human instrument is "able to be immediately responsive and adaptive … expand his/her understanding through nonverbal as well as verbal communication, process information immediately, clarify and summarize material, check with respondents for accuracy of interpretation and explore unusual or unanticipated responses" (Merriam & Tisdell, 2016, p. 16).

There is social knowledge that comes from a unique contribution from personal viewpoints and subjective interpretation (Jain & Courage, 2013), and thus the role of the researcher as an observer-participant positively contributes to the insight of the usefulness of the data, the collection system, and the data analysis.

In 2011-2012 academic year, the researcher worked as a teacher and a consultant to the venture. I was contracted as a first-grade teacher, but after a few months of discussions with fellow teachers, the principal at the time and the owner/founder of the school, we decided that a scope and sequence would help focus the K-12 academic outcomes. As an experienced teacher and curriculum specialist, I was given a second contract to work with the faculty and administration in a process of selecting academic standards and language assessment tools as well as aligning the curriculum, instruction, materials, and assessment materials and products. The result was a Scope and Sequence manual that was used a few years later to obtain accreditation for the school by AdvanceED, an international, non-profit academic accreditation agency. I continued my relationship after I returned to the United States, from 2012 to 2016, by serving on the Board of Directors of the Educational Fund, a non-profit organization that raises money for scholarships for Moroccan orphans, American and Korean missionary students, and low-income Moroccan students attending the American School.

In the spring of 2017, I returned to Fez to better understand the expansion plan for the new school in Rabat and explore how my research questions related to effectuation theory could be relevant and useful to the participants. Once we mutually decided there was a good match between my administrative skills, experience as a curriculum specialist, and entrepreneurship skills and the school leadership's need for someone they could trust to operate a school with limited oversight, I was hired as the vice principal. In fall of 2017, I began working with the entrepreneur and the expansion team on the establishment of the new school in Rabat as the academic leader. After a month, I was promoted to principal.

Because of this layered role as a member of the expansion team, the school administrator, and the researcher, conducting a case study was initially problematic in that the school launch was compromised with authorization issues, threats from competitors, and financial short falls. The research timeline was adjusted, and once IRB approval was received in April 2018, the research resumed.

Data collection materials and procedures. To collect data for the case study, I lived in Rabat, Morocco, and spent weekends and some weekdays in Fez from August 2017 to July 2018. I began collecting data for the study in April 2018 after IRB approval.

The data set included semi-structured interviews, informal conversations, examination of pertinent documents, and planning sessions. I used theory or concept sampling because the aim of this type of sampling is to generate a theory or explore an idea via the interview questions and format.

For the first part of the study, I conducted scheduled, in-depth, semi-structured interviews, and informal conversational interviews that were recorded with the founding owner/director and five participants who were significantly involved in the evolution of the school in its infancy. Interview questions included here as Appendix A illustrate the types of questions used to elicit data that would address the research questions.

In the second part of the study, I recorded four planning meetings with the expansion team and founding owner/entrepreneur. During this segment, I maintained field notes of observations of activities, events, and daily life at the American School in Fez and Rabat, with an emphasis on meetings, conversations, and interactions around the venture efforts.

The recorded interviews and my field notes were supplemented with written records such as journal entries of the owner/director and team members, legal filings, notations, meeting minutes, photographs, and files belonging to the owner/director, associates or team members that contributed to our understanding of the initial and subsequent processes in establishment of the second site occurring naturally.

Naturally occurring empirical material is defined as “specimens of the topic of research” (Voutilainen, Peräkylä, & Ruusuvuori, 2011). If a study is about how journalists report war, then watching and analyzing footage of how journalists report war is considered naturally occurring material versus interviewing journalists and asking them how they reported war as a past experience. In this study, it made sense to document how the entrepreneur made business decisions as she operated both schools as a means of collecting empirical data to substantiate and compliment what is shared in the recorded interviews (Silverman, 2001; Speer 2002). This type of live data gathering supports that construct of naturally occurring because the researcher acts as both a participant and an observer, and the participants assisted in the documentation and reflection of the actions being taken as part of the planning process and the outcomes as they were deliberated in subsequent meetings.

Interviews. Chase (2005) describes the shift in the relationship of the qualitative researcher interview and interviewee to the narrator and listener; the semi-structured interview question instrument is designed to guide or elicit stories or experiences. Lieblich (2007) states that interviews in the narrative tradition often require emotional maturity, sensitivity, and life experience. This is true because interviews in the narrative tradition involve intensive interaction with the narrator. These types of interviews require patience, to encourage narrators to explore the deeper meanings of actions or experiences and to bear witness to a wide range of emotions.

Furthermore, the interviews and facilitated sessions require the fluid process of talking and listening between researcher and participant that promotes reflexivity. Chase (2011) offered that there is a shift from the researcher asking the participant to generalize experiences to inviting the narrator to tell unique stories, treating the interview schedule as more of a guided conversation and allowing the narrator to command the telling, all the while requiring emotional maturity and sensitivity from the researcher (Lieblich, 2007), and probing skills for deeper meaning or interpretation from the narrator (Polkinghorne, 2007).

Patton (1980) presents two basic interviewing approaches that are employed in collecting qualitative data appropriate for heuristic research in this study. One approach is the informal conversational interview, a spontaneous exchange of questions, comments, and conversations where the participant and the researcher create natural dialogue. The second approach is the general interview guide, similar to the semi-structured interview, in which a series of topics, themes, or probes is preconceived and guides the exchange between the researcher and the participants.

The interviews were recorded on a smart phone and an iPad using an in-device recording system. The recordings were uploaded to a double-encrypted iCloud data storage account immediately following the visit. A majority of the interviews took place in the participant’s office or home, or at a coffee house. One interview was held at the Fez train station. Three interviews were conducted via Skype.

A consent form was reviewed with and signed by participants either before or shortly after the interviews and filed according to IRB approval protocol. Copies were scanned and uploaded to a double-encrypted iCloud data storage account.

To ensure confidentiality, the recorded digital interviews and transcriptions have been double-encrypted and stored according to date and time in a double-encrypted iCloud data storage account. The interviews were then deleted from the iPad and smart phone. The passwords are being kept in a secured location known only to the faculty supervisor and researcher.

Research journals. While the recorded interviews hold the words spoken, a journal "helps us attend to our senses—what we see, hear, and sense in our bodies—all of which are needed for reflexive monitoring" (Ellingson, 2006, p. 128). Journals helped the researcher focus on the internal responses of being a researcher, and captured dynamic perceptions and evolving understanding of method and content (Etherington, 2004). The entrepreneur, associates, and expansion team members were asked to keep journals during the investigation period so that stories or recollections triggered by segments of interviews could be captured and shared with the researcher at the next meeting or interview. Only two participants kept journals, and these were subjected to free textual notations, coding for pattern detection, categorization, theory-building, and, finally, abductive analysis as part of the data analysis process. The researcher's and participant's journals and researcher's field notes were scanned and uploaded to a double-encrypted iCloud data storage account.

Personal journals. Notetaking is a necessary element in qualitative research and research journals meet that need in the field. Deep reflection while sitting with the data should have disciplined and theoretical rationale. Heuristic journaling is a method for recording insights, impressions, questions, and actions based on heuristic inquiry. Moustakas (1990) tells us that heuristic inquiry is born from a question or a challenge by the researcher, based on personal curiosity, and "requires that one be open, receptive, and attuned to all facets of one's experience of a phenomenon, allowing comprehension and compassion to mingle and recognizing the place and unity of intellect, emotion, and spirit" (p.16).

The heuristic researcher seeks to discover the unique patterns of experiences through a systematic and orderly process and procedures. It is in seeking to know the details of what is known that one builds "tacit knowing," a sort of knowing without knowing how we know it, which Moustakas (1990) argues is the foundation of heuristic discovery.

In terms of journaling in qualitative research, notations can range from specific dates, times, and names to key ideas or incidents, but Heuristic journaling is note-taking or reflective writing that "will yield accurate and vivid dimensions of *the experience*—situations, events, relationships, places, times, episodes, conversations, issues, feelings, thoughts, perceptions, sense qualities, understandings, and judgments." (Moustakas, 1990, p. 44)

In his guidelines for analyzing data, Moustakas (1990) prescribes that the researcher should gather all of the data from one participant (recording, transcript, notes, journal, personal documents, poems, artwork, etc.) and then immerse themselves into the data so as to become intimate with the parts until they can be recognized as a whole experience. He encourages intervals of rest away from the data for the purpose of reflection or making room for insights to occur around the central phenomenon being investigated. During this time, the researcher should record thoughts and ask him/herself questions as a way to delve and discover deeper meaning of the experiences, impressions, and insights unfolding. As this occurs, the researcher begins to construct an image or portrait of the participants' experiences and then shares this with each participant "for affirmation of its comprehensiveness and accuracy" (Moustakas, 1990, p. 51). In the final stages of data analysis of heuristic writing, the presentation of the portraits and experiences enters a stage of creative synthesis. The researcher combines the data based on the tacit-intuitive sense of the researcher. The explicit and implicit knowledge that has undergone a process of immersion, illumination, and explication is delivered by the "scientist-artist" as an interpretation of themes and profound meanings of the phenomenon.

The data collection materials included in this study are transcripts of individual interviews, transcripts from planning meetings, researcher's field notes during the data collection, research reflection journals, personal journals kept by the main referent, the business plan of 2004, and notes taken by participants.

In this study, the transcripts of interviews, informal conversations, and planning meetings are coded for pattern detection and categorization of the entrepreneurial processes, while the journals of the researcher and participants are maintained for the practical purpose of recording details as well as for capturing reflections of relationships between the data sets, like interviews and archival documents, identifying gaps in the responses, or probing further into certain explanations, conditions or incidents.

Protection of human subjects. The researcher completed the CITI course and has a valid certificate. As required by the University of the Incarnate Word, consent by the IRB was obtained on April 16, 2018 in order to comply with the protection of human subjects requirement. An extension to the original IRB was approved on May 21, 2019. Great care and effort were made to protect the human subjects, their identities, and their right to privacy. Pseudo names were used in the recording and reporting of data. A letter of formal consent in English was collected from each participant and is being held for safe keeping by me and the faculty adviser via a double-encrypted iCloud account. Appendix B is the Participant Consent Form that was used for this study.

Data collection schedule. Table 5 shows the research time frame, activities, the persons involved, and the data product in the first and second phases of data collection:

Table 5

Study Time Frame of Activities, Participants and Data Sources

Time frame	Activity	Participants	Data Source
Spring 2018	Formal interviews Informal conversations Review of documents Attendance to school activities Observation	Owners Researcher	Audio recordings, transcripts, researcher's field notes, and journal entries.
Spring 2018	Formal interviews Informal conversations Review of documents Observation	Owners Participants Researcher	Audio recordings, transcripts, researcher's field notes, and researcher and participants' journal entries.
Spring/Summer/ Fall of 2018	Professional workshops Expansion team sessions Informal conversations Review of documents Observation	Owner Expansion team Researcher	Audio recordings, transcripts, researcher's field notes, and researcher and participants' journal entries, copies of documents, session charts, photos, and other artifacts.
Spring/Summer of 2019	Member checking Informal conversations Observation	Owner Expansion team Researcher	Audio recordings, transcripts, researcher's field notes, and researcher and participants' journal entries.

Validity

To address issues of researcher validity, verification techniques included; (a) member checks of interview transcripts, artifacts and field notes; (b) feedback from colleagues, expansion team members, and others; and (c) reflection on and review of transcripts, artifacts, journal entries of events, and field notes.

Member checking was the primary method for determining the accuracy of the interpretation of the meaning assigned by narrators' words, thoughts, and experiences. Merriam (2002) cites member check as a key strategy:

> For ensuring validity in qualitative research …Here you ask the participants to comment on your interpretation of the data. That is, you take your tentative findings back to some of the participants (from whom you derived the raw data through interviews or observations) and ask whether your interpretation "rings true." (p. 26)

Generalizability

Case studies are an experiential learning endeavor which brings the researcher close to the nuances of what is being studied, providing detail to the issues of the social, cultural, or other contexts of the case (Stake, 2005). Regarding generalizability of a case study, Flyvbjerg (2006) posited that, like natural science, generalizations can be made based on the chosen case and the rationale of the selection of that case.

In this sense, this case study provides a context-dependent knowledge necessary for building understanding of the central question of entrepreneurial process and, as Flyvbjerg (2006) argued, the development of a nuanced view of reality while developing the skills critical to conducting good research.

Chapter 4: Findings

Background

The purpose of this case study was to explore and understand what elements of effectuation theory principles, if any, were used during the establishment of the school in Fez (Phase One) what principles of the theory of effectuation were used during the establishment of a second school in Rabat (Phase Two). The purpose of the study centers on understanding an entrepreneurial way of thinking and making decisions in situations of uncertainty.

On a theoretical level, I wanted to contribute empirical research to the theory of effectuation and to understand how entrepreneurs negotiate their positionality while engaged in the entrepreneurial process in a developing host country. At a practical level, I wanted to provide "thick description" of how an entrepreneurial team thinks, strategizes, implements, and assesses entrepreneurial activity with the possibility of developing a framework or set of principles that entrepreneurs can utilize in the establishment of SMEs or organizations.

The primary research question was: Did the entrepreneur(s) use principles of effectuation theory and other cognitive processes and strategies in the creation of a firm in a foreign country? If so, how? Secondly, how have these cognitive processes, strategies and interactions contributed to or hindered the creation of a business venture in a developing country? In the second phase of the study, the guiding research questions were, what entrepreneurial processes and strategies are being employed by the owner/director and expansion team in its expansion in Rabat, Morocco, and how can the team utilize these processes and strategies to build local, contextual knowledge for optimum implementation of future schools?

The first portion of this chapter includes a participant overview and summary of activities for both phases of the study.

The second portion is a description of the process of data analysis and how it evolved over time from the data collection period to the heuristic process of understanding the parts of the data as one body of research and interpretation.

The categories that resulted from the data analysis comprise the third section. Each category begins with either a story that exemplifies the essential nature of the category or a few quotes or phrases that permeate the category via the codification method used for identifying the category. A full description of the category is presented, as well as the cumulative entrepreneurial cognitive processes, strategies, and interactions.

The categories are presented chronologically. Phase One includes the interviews and documents written or published in the early years of the Fez school (2001 to 2015) and Phase Two includes planning sessions and documents produced in the years centered around the expansion to the Rabat school (2016 to 2019).

The fourth portion of this chapter captures the meta-analysis of the 10 categories, five derived from the five principles of effectuation theory and five that derives from the data, to form five themes. The themes were generated by examining the coding system used to generate the categories and simultaneously synthesizing unique narrative elements in each category that bound them into a single, larger discovery.

Participant Overview and Summary of Activities

Initial contact. In the spring of 2016, I contacted the school director/co-founder of the school and shared the purpose and tentative scope of the study via Skype. In the spring of 2017, during an administration meeting at the school in Fez, I presented the main elements to the Fez school leadership team. Two participants who were involved in the initial phase of the school were invited to participate by email because they now live in the United States. Three other participants who have been employed at the school since the beginning and are not on the leadership team were contacted in person.

I was the eleventh participant.

Phase One participants and activity. Six persons were interviewed for Phase One of the study and only the researcher kept a research journal. The school director was interviewed three times. The business manager/co-founder was interviewed twice. The other four persons were interviewed once. Table 6 outlines the Phase One participants.

Table 6

Participants in Phase One

Role of participants	Citizenship	Gender	Years with school	Interview	Education
Owner/Co-founder	American	Female	15	Personal	M.A. in Education
Manager/Co-founder	American	Male	9	Skype	B.A. in Business
Principal	American	Male	6	Skype	Ed.D. in Education
Security/Teacher	Moroccan	Male	15	Personal	High school
Secretary	Moroccan	Female	14	Personal	High school
French teacher	Moroccan	Female	15	Personal	M.A. in Education

In the personal meetings and over email, I provided a general overview of the study, articulated the research questions, and distributed a review copy of the confidentiality agreement. After the person agreed to participate, the first interview was scheduled. During the face-to-face interview, the participant signed the confidentiality agreement. For the two Skype interviews, the confidentiality agreement was signed and emailed to me after the interview.

All six interviewees agreed to be recorded. All but one interview was held in participants' homes. One interview was held at the train station café. The recordings were transcribed within a month of the interview and the six persons participated in member checking to review the transcripts and preliminary findings.

Phase Two participants and activity. Five persons participated in the expansion process and planning meetings in Phase Two of this study. I was the sixth member of the team. We were all employees of the school at the time of the study. Three persons, including the researcher, kept research journals for Phase Two of the study. Table 7 provides information about the Phase Two participants.

Table 7

Participants in Phase Two

Role of participant	Citizenship	Gender	Years with school	Years in study	Education
Owner/Co-founder	American	Female	13	2	M.A. in Education
Fez Principal	American	Female	3	1	M.A. in Education
Fez Teacher/Rabat business manager	Moroccan	Female	2	1	M.A. in Education
Fez Technology manager	Moroccan	Male	5	2	B.A. in Technology
Fez Teacher/Business manager	Moroccan	Male	3	2	B.A. in Business
Fez Teacher/Fez and Rabat Principal	American	Female	3	2	M.A. in Education

During the first face-to-face group meeting, I provided a general overview and timeline of the study, discussed the research questions, and distributed a review copy of the confidentiality agreement. All five members of the expansion team signed the confidentiality agreement.

Four formal expansion team planning sessions in the school director’s office, about 10 small group meetings of a combination of the members, and about 20 discussions between the school director, Rabat business manager, and the researcher were held. The four formal planning sessions were recorded and transcribed. All other meetings or conversations were documented via researcher journals.

After the transcripts of the planning meetings were completed, the transcripts and preliminary notes were distributed, and member-checking was conducted via telephone during the summer of 2018 or in person in the fall of 2018.

Transcription and Coding. After each interview and session recording, I listened to the full recording for clarity of sound quality and made preliminary notes on the topics and general time intervals. The digitally recorded interviews were uploaded to a secure website called Vanan Services, a private online transcription company for the production of verbatim transcription. Most interviews were lasted an hour or longer, except for one that lasted 47 minutes. The planning sessions typically lasted 1 hour. Each completed transcription included the title of the recording, the date of the recording, the total recording time, the language spoken, and a description of sound quality. If there were moments in the transcripts when the sound or voice were inaudible, the phrase "inaudible" was inserted into the transcript.

Upon receipt of the completed transcription, I conducted a second review of the transcript by listening to the recording and correcting any minor errors in the electronic version of the transcription to ensure there was a reliable database (Merriam, 2009). Minor errors included misspelling of names in Arabic, such as Bensellam, or English words that sounded similar, like Austin and Boston. After verifying the transcription was accurate and reliable, I listened to the recordings twice to familiarize myself with the data (Yin, 2011) and began the free textual notations (Smith, 2015) on the printed versions of each transcript to note stories that captured an insight by the interviewee, seemed to illustrate a reference to my research question, or would require clarification during member-checking.

Data sources, coding and analysis. While the first IRB approval was granted April 18, 2018, data sources like the business plan, personal journals, and the researcher's field notebooks were produced prior to the approval date and are considered archival documents. Data sources from Phase One include audio recordings, interview transcripts, researcher's field notebooks, the business plan written in 2004, photographs, and personal journals from 2003, 2004 and 2005. Data sources from Phase Two include audio recordings, expansion team session transcripts and charts, researcher's field notebooks, participants' journals, and photographs.

Figure 3 shows the data sources, the coding process and analysis, and the category and theme formation. The data sources, reflected in the list above, are located at the left of the diagram and are divided into audio recordings and subsequent transcripts (at top) and printed documents (at bottom). They are divided because the audio-based transcripts required two additional steps in the coding system: listening/reading for accuracy and member-checking.

As Figure 3 shows, by conducting a free textual analysis, I began codifying the words, phrases, and encapsulated stories on the electronic versions of the documents. By codifying the data, I was able to divide, assemble, reorganize, and make associations in order to merge meaning and provide an explanation (Grbich, 2010).

In the first cycle of coding, I took three sequential steps. First, I coded the electronic version by inserting superscript numbers to the section of the transcript that referenced the five principles of effectuation theory, and later other cognitive strategy. Next, I marked the text with two capital letters to denote the type of code: descriptive coding (DC) and process coding (PC). The purpose of descriptive coding is to highlight a primary topic and "assist the reader to see what you saw and to hear what you heard in general" (Wolcott, 1994). Process coding

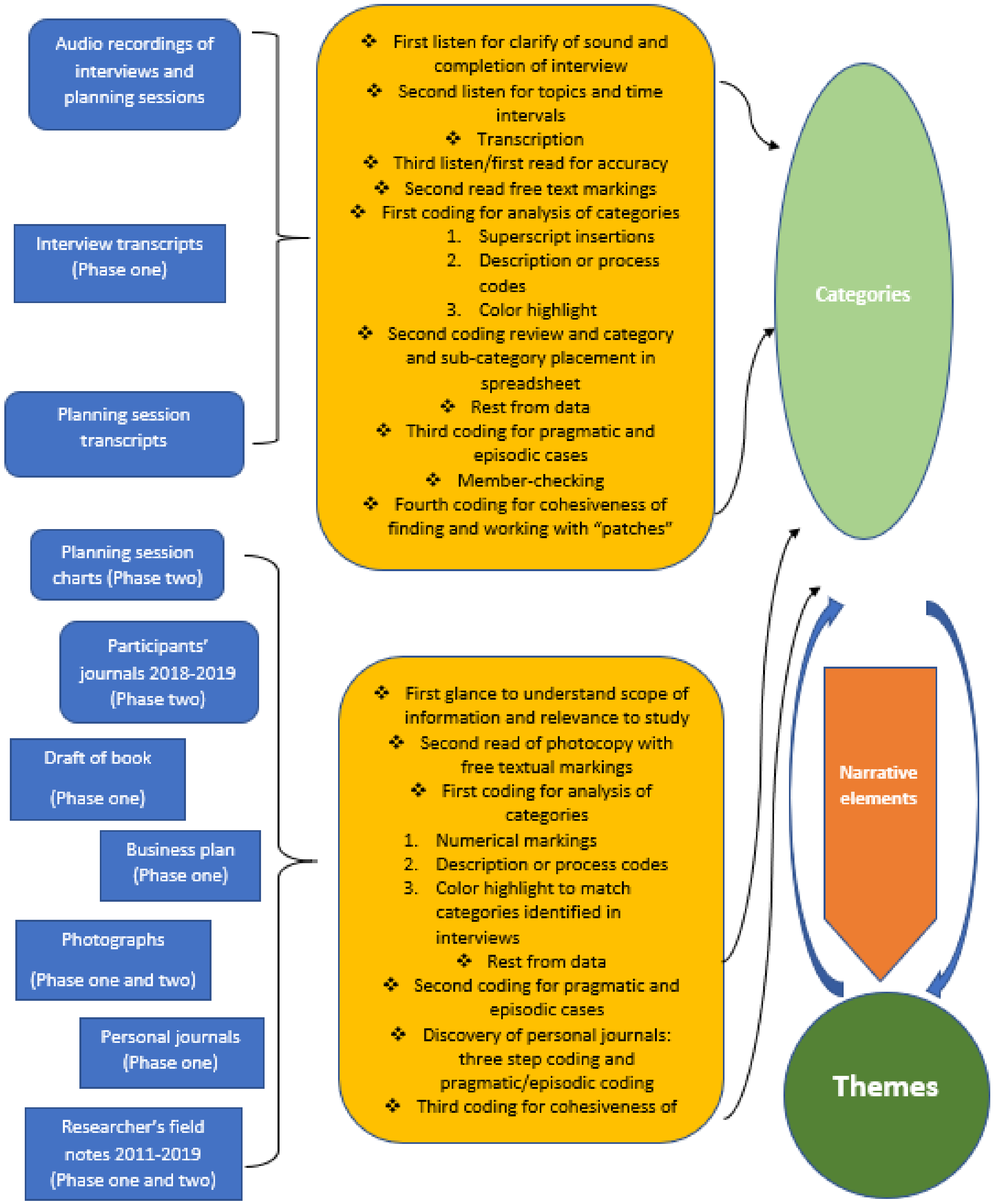

Figure 3. Diagram of data sources, the coding process and analysis, and category and theme formation.

symbolizes the section of the transcript when the speaker recalls a significant action they or a significant actor took (Saldaña, 2015). Lastly, I used a color-highlighting tool in Microsoft Word to mark the encapsulated story with the same superscript numbers that represented one of the five effectuation theories or other cognitive strategies natural to the text.

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Once these steps were completed for every data source, I copied and placed each codified, color-coded section of text onto an Excel spreadsheet, along with the initials of the speaker. A color-coding method allowed me to immerse myself into each of the categories and begin the heuristic data analysis described by Moustakas (1990) and summarized in Chapter 3. From descriptive and process codes, categories beyond the principles of effectuation theory became clearer and could be described as "stand-alone" categories. These stand-alone categories were interactive socio-cultural context, key constructs of an entrepreneur, faith, uncertainty and authority as trust.

The second cycle of coding emerged as part of the immersion into the codified phrases and stories. Fragmented texts and stories were coded as either pragmatic cases (Becker, 1996) or episodic cases (Flick, 2002). Pragmatic cases illustrated the central theory being explored in this study, while episodic cases were instances when a narrator told stories about unique experiences of change or disruption in the person's life or understanding. While at the time of coding it did not seem particularly relevant, this process of differentiating between ordinary and disruptive events was very helpful in the development of themes, other than the principles linked to effectuation theory.

Data coding of entrepreneur's personal journals. The existence of personal journals was revealed towards the close of the data analysis phase of this study, in the spring of 2019. They contained significant information about the motivation and logistic assemblages of the founding of the enterprise and were thus included as data to be coded and analyzed. I followed the same coding process for the four original, hand-written journals kept between the years 2001 and 2006 as with other printed documents. Notations were made around key phrases for categorization and pattern recognition.

This layered method of coding allowed me to further expand the insights, positions, and postulations of each of the categories in a heuristic manner (Moustakas, 2001). While the interview transcripts, research journals, and business plan had previously been coded into categories that were forming themes, the personal journals fell significantly outside of those categories, given the highly religious, personal, and emotional nature of the journals. New categories- interactive socio-cultural context, key constructs of an entrepreneur, faith, uncertainty and authority as trust- emerged from this data source and from researcher's conversations with the entrepreneur about the contents of the journals.

Analytic Memos. In the process of free textual reading, marking, and coding, analytic memos were created. Analytic memos are written notations which, according to Maxwell (2013), differ from field notes written during the data collection stage because they are generated during the "reads" of the transcripts during the data analysis stage.

Analytic memos became journals in which I would note trends or insights as I read and coded the transcripts, personal journals, field notes, and business plan. The goal of analytic memos is not to summarize the data or reduce it to categories, but to reflect and expound on the nuances in the analysis or theory development. They act as "a place to dump your brain about the impressions of participants, events, concepts, or processes under investigation by thinking and thus writing and thus thinking even more about them" (Saldaña, 2015, p. 44).

In my memos, I noted future directions, unanswered questions, frustrations with writing and possible causes for the frustration, insights about new categories, and the emergence of themes. Memos were particularly helpful as I struggled to organize the presentation of the coded sections of data to support categories. These memos were not coded according to categories, but instead served as a critical tool for sense-making and insight development. Connections were made in memos between data sources to enrich categories and also advance themes. The memos were the meta-cognitive expressions that led to the nuanced interpretation of the data in analysis.

Data Analysis

Approaches to and procedures of data analysis. In this narrative inquiry study, three frames of data analysis and their respective methods were applied. This involved the use of Merriam and Tisdell's (2015) steps of analysis, Stake's (2005) phases of data analysis, as well as Moustakas's (1990) Outline Guide for Procedures of Data Analysis.

Merriam and Tisdell (2015) begins the conversation about data analysis with the belief that "category construction is data analysis" (p. 204), and compares this analytical process as a movement between looking at the tree to looking at the forest and back to looking at trees. She outlines the steps as follows:

1. Consider the purpose of your study (what do you want to learn?).
2. Use the epistemological lens of your study.
3. "Open code" the words or phrases, focusing on patterns and insights that are responsive to your research question and lens.
4. After marking many codes, glean the main concepts or surmise answers to questions.
5. Return to the small fragments of data that support your categories or findings.
6. Use a type of constant comparison method, or way of grouping codes, sometimes called axial coding.

Stake (2010) describes the phases of data analysis as a process of taking things apart (analysis), examining the bits through the lens of our experience (patches of collected data), and putting them back together (synthesis), usually in ways different than we saw them at first. He explains that "much qualitative research is based on the collection and interpretation of episodes. Episodes are held as personal knowledge more than as aggregated knowledge. An episode has activities, sequence, place, people, and context." (p. 133)

After data are collected, the first phase is to de-construct the data and to investigate the coded segmented stories or phrase or experiences. Stake (2010) calls these patches. Patches are episodes that are salient, useful stories or shared exchanges that can be studied, recorded, observed, interpreted, and re-interpreted. In this phase of examining the patches, Stake suggests that data be conducted intuitively, with common sense, and follow the patterns of other researchers, as well as the patterns the researcher may have used in the past.

In the next phase, the data were triangulated by following these patterns and saturating our understandings, and begin to synthesize. In the synthesizing phase, we begin to reshape "dialogues, portrayals, and explanations, further insights into how something works" (Stake, 2010, p. 134).

The guidelines of data analysis within the heuristic approach to a study are fundamentally entrenched, becoming intimately immersed in the material about the individual and groupings of participants.

Moustakas (1990) depicts the progression of data analysis after data collection as follows:

1. Engage in extended listening of interviews even before you take notes.
2. Combine listening with note taking and verbatim quotes of significant phrases or axioms.
3. Develop a portrait of the participant with detail description of who they are and their experiences.
4. Diagram the emerging portrait or concept.
5. Color code the system of main concepts or commonalities of the grouping(s).
6. Rest from the data and watch for shifts in understandings or perception of the data.
7. Begin to formulate explications or depictions of the individual or group experiences.
8. Formulate a composite depiction using clear, accurate and vivid qualities and themes.
9. Return to the data and choose two to three individuals that exemplify or essentialize the main themes or concepts.

10. Create a form of expression (poem, story, essay, report, etc.) of the tacit and intuitive illustration of the understanding captured through the research.

The most important aspect in data analysis of a qualitative study is that analysis happens in the various stages of research and is an iterative process (Merriam, 2002). These three approaches exemplify this idea. In this case study about entrepreneurship, the hunches, or educated guesses, began significantly before the dissertation proposal was even approved because I am an entrepreneur and had worked with the participants over the course of six years in multiple capacities. The hunches were in the formation of the research questions. The emergent nature of the qualitative research design was premised on what might be going on in the expansion process. Intuition played a role in the coding of the interviews, research journal entries, and the approach to thinking about and organizing the data (Merriam & Tisdell, 2015).

To capitalize on the researcher's impressions as the main source of sense-making of the data, I utilized procedures of data analysis based on a constructivist orientation as described in Chapter 3 in the section on Epistemology. I have inserted protocols, like analytic memos, "that help [researchers] draw systematically from previous knowledge and cut down on misperception," but still give precedence to intuition and impression rather than guidance of the protocol (Stake, 1995, p. 72).

Data analysis during the data collection phase. During the interview stage, I began to use forms of data analysis (i.e., description, categorical aggregation, establishing patterns, and naturalistic generalizations) described by Stake (1995, 2005). I noted assertions about what was being described by interviewees or in documents, and what I observed had happened during the interviews or in conversations about events. These assertions (Stake, 1995), as recorded in research field notebooks and analytic memos, reflected my interpretations and understandings of how the data might answer the research questions. The purpose of these assertions was to begin to formulate hunches in the form of sentences.

Initial phase of data analysis. The first step in analyzing the data was to "identify the segments in the data set that are responsive to the research question" (Merriam & Tisdell, 2015, p. 203). This unit of data can be a word, a phrase, a story that depicts a feeling or a phenomenon, or even several pages of a recollection that point to a specific episode or experience that addresses the research question (Merriam & Tisdell, 2015).

Similarly, Saldaña (2015) advised that descriptive, process, and pattern coding, among others types, lend themselves to exploration of the phenomenon of interest of a study. Descriptive coding assigns basic labels to the data to provide an inventory of topics. Process coding identifies gerunds to connote action in the data which can be observable, like running, or conceptual, like negotiating. Pattern coding refers to the meta-code, or the organization of the body of data and the meaning assigned to that organization.

The first cycle of coding, or first read of the data, utilized an eclectic coding system. Eclectic coding allows for two or more compatible coding systems to exist side by side. For example, one case could be classified as a descriptive code as well as a process code, like "creating partnerships."

As I went through this identification process, I kept in mind what Lincoln and Guba (1985) posit as the two criteria for a unit of data:

1. The unit must be heuristic in that it tells something about the study and must lead to a higher insight beyond the chunk of information; and
2. The unit must be able to be understood as a "stand alone" topic without reference or context.

This filter allowed me to sift through the data and create codes in the data sets that would ultimately serve the purpose of the study as well as answer the research question about the entrepreneurial process.

Data analysis during the transcription and coding phase. After the recordings were transcribed and cleaned in the first stage, as described in Chapter 3 in the section on Transcription and Coding, I began compiling, disassembling, reassembling, and interpreting one interview at a time. I spent two to four hours with each interview, about three different times, focused on familiarizing myself with all the information that had been gathered. Moustakas (1990), in step one of the guidelines, encourages that the researcher “set aside for a while, encouraging an interval of rest and return to the data, procedures which facilitate the awakening of fresh energy and perspective” (p. 51). The data set at this stage also included the business plan, photographs, the draft of the book initiated by the school director, the researcher’s field notebooks, and drawings by the researcher or interviewer.

Analytic memos were used with the research journals during the reviews of the transcripts and relevant data. These memos were later the source of analysis in the exploration of how they related to principles of effectuation theory as well as the development of emergent categories, and, later, themes.

To aid the focus on answering the research questions, I printed the research questions, pictorial graphs taken from the effectuation.org website, as well as hand-drawn renditions of icons for the five principles, and taped them near my desk.

While reviewing data sets for each participant, I asked myself two questions Moustakas (1990) considers critical to the process of examining the uniqueness of each item of data:

1. Does the depiction of what has been generated or construed from the coding and notations contain the qualities and themes essential to the experience? and
2. Does the depiction of the experience match what was originally transmitted by the participant?

Both questions forced me to keep the depiction, a composite of multiple data sources, true to the original form.

Data analysis during the second phase of coding for categories. Merriam and Tisdell (2015) recognized that analysis is not a linear process, but rather an interactive one, so in January and February 2019, I revisited the interviews, notes, coding spreadsheet, and categories. Even in late spring, when the principal referent of the study shared four personal journals, I was able to expand the coding to include categories derived from in the texts, such as faith and uncertainty.

I amplified and drilled down on the coded data and transcripts using the methods Saldaña (2015) describes as descriptive, process and simultaneous coding, and the process resulted in expanded categories that were amassed into textual documents, then into files. These codes are described in detail in Chapter 3 under Data Analysis Procedures. These meaningful segments of data and documented patterns and themes were also noted in research journal notes. These segments were expounded upon in analytic memos. During this time, I utilized Excel to track the data categories that re-emerged or new categories not identified in the first cycle.

Based on the definition of a pragmatic case (Becker, 1996) and an episodic case (Flick, 2002), I flagged the stories and divided them on a separate spreadsheet. While most of the units of data were stories, they represented primarily pragmatic cases that supported principles of effectuation theory. About one-third of the units of analysis were episodic cases that demonstrated a disruption in their life or their plans for the enterprise.

To ensure accuracy of the transcription, I met with the participants to clarify the meaning of a story and used member check procedures to ensure that the direct quotes I selected reflected what they said and meant (Marshall & Rossman, 2011). These files and categorical aggregations were shared with the participants as a member-checking exercise.

Data analysis during the third and fourth phases of coding for categories. I mindfully immersed myself in the data, per Moustakas' (1994) recommendation, as I sought to develop a tacit knowing that he posits as the foundation of discovery. By systematically reading and re-reading the ways that the units of data, in the form of words, phrases, and full stories, related to each other, I began to interpret deeper meaning to the stand-alone categories. I was able to "draw from them every possible nuance, texture, fact, and meaning" (Moustakas, 1990, p. 24) of the data until I could perceive the whole experience. Moustakas (1990) calls this intimate process indwelling. Indwelling requires patience and incremental understanding that move the researcher towards a creative synthesis of the essential qualities and meanings.

There is evidence in Chapter 5 of the ways that the categories linked to each other, as a result of the indwelling process. An example of discovery is the absence of the concept of Affordable Loss during the inception of the school in Fez and the manner in which it became a critical consideration in the decision to close the Rabat school.

Categories

The data were examined for the presence or absence of the five principles of effectuation theory: (1) Means Orientation, (2) Entrepreneurial Agency, (3) Building Relationships, (4) Leveraging Contingencies, and (5) Affordable Loss. The examination revealed, if they were present, how they were expressed. Other categories, like (6) Interactive Socio-Cultural

Dynamics, (7) Key Constructs of the Entrepreneur, (8) Faith, (9) Uncertainty, and (10) Trust derive from the examination of the data sources.

Within each category are stories or an explanation of a situation that exemplifies the category. Each story or situation is marked as an episodic case or a pragmatic case, referring to the type of case, as defined in the previous section. Each story has a title that captures the essence of the story or situation. The purpose of the title is to assist the reader in remembering the story when it is referred to in Chapter 5.

Phase One: The Original American School Fez

Category 1: Means orientation. In analyzing the personal history of the co-owners of the school, it became clear that neither had previously established or owned a business or had been chief operating officer of a business, organization, or school, but both did have international living experience and international teaching experience. One co-owner was an educator with a master's degree and had taught in Budapest, Hungary, Wuhan, China and Austin, Texas. Her knowledge of curriculum design, materials management, classroom instruction, English as a Foreign Language education, and international tenets of education guided the planning and establishment of the school. The other co-owner had worked as a Texas regional manager and senior manager for ten years for a technology company and had investments in the technology industry. After having two children, the family of four moved to Morocco in 2004 to establish an American school.

Episodic case 4.1.a: Assault in Hungary. Michelle describes herself as fearless, and attributes her fearless attitude to an incident that occurred in Hungary. When she was 23 or 24 years of age, after the fall of communism in the Eastern Block, she volunteered with a Christian group to teach English in secondary schools in Hungary. One night, she was assaulted by a man, dragged into the nearby woods and almost raped. She managed to run away, but the perpetrator slammed her head against the wall and tore her coat off. She continually called for help from her roommate and prayed to God to save her. Eventually, she managed to return to her apartment. For weeks, she experienced severe headaches, nausea, and insomnia, and became depressed. She was afraid to leave the apartment and felt like someone was going to hurt her on the subway or at the bus station. She played guitar at a Christian church and would often have nightmares that the assailant cut her fingers, so that she could not participate in praise and worship during church services.

One day, a young man she didn't know came up to her at church and asked if she had been having bad dreams. She said she had. The young man asked if he could touch her head and pray over her. She agreed. Within a few minutes, he was gone. Within the next hour, the fear that had gripped her life was gone and the nightmares disappeared.

Pragmatic case 4.1.b: Sister of two older brothers. M. Forciea believes that her bravery came from being the youngest sister of two older brothers who used to beat her up often and sometimes brought their friends over to let them beat her up. "They loved me, but played all-star wrestling with me and the tag team," she said. She made a point not to cry or show weakness. She also taught middle school and equated the challenge of teaching boys that were taller and more muscular than her with that same sort of resolve not to show fear or weakness.

Pragmatic case 4.1.c: By virtue of being American. When M. Forciea taught in Hungary, she met students who she claimed were "way more brilliant than I am." They spoke several languages and were well read, and yet because of the political and economic conditions of the country, they might end up selling books by the side of the road. M. Forciea reported that this made her realize that she should use her position as a college-educated American who spoke

English well to make a difference. “I have an education and I know how to educate people. My only goal is I want to feel like I’m making a difference in the world,” she said. She added that while she never felt completely qualified to open a school in Morocco, “nobody else is doing it. I’ll figure it out.”

Pragmatic case 4.1.d: Not an adjacent opportunity. The co-owners had worked, lived, and taught in Hungary and in China. Michelle was a teacher of English and Jim worked with youth and taught English. Jim had experience as a regional manager of a technology company in Texas, the second largest state in the United States. Together, they had accumulated money and international living experience in developing countries, and had a vision for opening a school. J. Hasbrouck shared:

> We’d never opened a school before. Michelle had some experience as a teacher in the United States, but hadn’t been an administrator. We never lived in Morocco. We didn’t speak the languages (French or Arabic). It wasn’t an adjacent opportunity that we went after.

In their SWOT analysis, included in the business plan written in 2004, they list five weaknesses. Two of the weaknesses are related to the owners: Lack of international business expertise and language barriers.

Pragmatic case 4.1.e: Key partnerships to offset deficit. From the outset, the co-founders were connected loosely to networks of mentors, business advisors, and a local family of educators with ties to Moroccan systems and institutions. Because the co-founders knew their lack of knowledge and skill related to starting and operating a school in Morocco was a deficit, they wrote in their initial plans that the American School would address deficits through partnerships with key individuals or organizations. They named a few in the business plan prepared by J. Hasbrouck in August 2003, 10 months before they moved to Morocco. Table 8 shows the key individuals with whom they formed a partnership at the outset, the experience they contributed to the project, and what role they played as partners.

Table 8

Key Individuals From Cases in Phase One

Name	Citizenship	Asset/Experience	Role
S. Louali	Moroccan	Moroccan school administrator for 25 years in neighboring city of Meknes	Helped with preparation of school. Led student recruitment. Acted as American School administrator for less than one year.
M. Louali	Moroccan	Arabic teacher for 35 years in Meknes, relationship with Ministry of Education	Assisted his wife, S. Louali with school administration. Taught at American school for less than one year.
E. Lozano	American	Ed.D. in American university, administrator in low-performing Texas public schools, experience as English as a Second Language learner	Served as Principal during years two through seven when co-founders were living in Texas.
S. Bowman	American	17 years of business experience in Morocco	Served on Board of Directors from 2004 to 2008. Parent of American students who attended and graduated from American School.

While the co-founders knew the 20-something year old daughter of the Moroccan family who helped open the school because she was the teacher of their children at a French School in Austin, they had never met the young woman's Moroccan parents, the Loualis. The co-founders could not communicate with the Loualis in Arabic or French, and relied on the couple's limited English as the language of communication. This made clear communication and, possibly, trust-building, difficult.

The co-founders met E. Lozano through their church a few months before they moved to Morocco and asked him to come work as the principal for the school. The co-founders worked with E. Lozano for a few months at the end of the school's first year in 2005. During his tenure, E. Lozano was responsible for operations and he and the co-founders communicated about financial and policy decisions via Skype.

Another American partner was S. Bowman. He was not involved with the operation of the school, but served on the Board of Directors of the American School fez. He kept in contact with the co-founders regarding its governance and status of the school in its first years.

These partners were heavily involved and responsible for compensating for the co-founder's lack of knowledge and experience in opening a school in a foreign country.

Pragmatic case 4.1.f: Faculty and staff. Najat Bensellam, the front office secretary at the American School attested:

> Honestly, I keep saying it all the time, like to all my family, my friends, I build ... all my life, my knowledge, my skills, they came from our school. I spent almost 13 years in Moroccan system. I love Morocco. I love my family, everyone, but when I came to our school, I feel like I discovered a different life, a different style of study and I just love it so much. Honestly. I enjoy every single day, honestly. Every day, I come to school, happy, smiling.

She spoke only Arabic when she started working with the pre-school children, and learned English with them, as well as how to navigate different cultures and student levels. Najat is now the front office secretary and uses her languages to communicate with parents, teachers and school staff about student performance, events, and school operations. Her husband, Mourad, was the school's first employee. Their relationship to the school was so strong that when the couple had their third child, the head nurse told the other nurses to get the mother and newborn ready because they knew that M. Forciea would be the first visitor at the hospital after the birth.

There are several people working as teaching assistants who started out working as custodians. Some technology and teaching roles have been taken by students who served as unpaid interns who wanted to practice their English. A majority of the administrative staff have been employed for 12 years or more. A majority of the Moroccan teachers have taught for the school for more than 10 years.

In the early years of the Fez school, the co-founders had a strong relationship with Educational Services International, an organization the co-founders worked with that sent teachers to China, Russia, Morocco, and several other countries. ESI's focus was to train teachers in English as a Second Language instruction, cross-cultural issues, and conflict resolution. They also visited teachers oversees and maintained regular communication, held retreats, and conducted site visits. ESI recruited, screened, and trained teachers for the Fez school for the first several years of the school's existence.

Additionally, the co-founders' organizational network included a variety of sources such as family members, teacher groups, school administrators, friends, and church supporters in Austin, Texas, and in Minnesota. In Morocco, they had no connection to organizations such as the American Embassy or groups representing organizations such as universities.

By 2017, the school director had an association with the International Christian Church in Fez, was on the Board of Directors for the American Fondouk, and had served as an External Evaluator for the international education accrediting agency, AdvancED. She maintained contact with family and friends in Minnesota.

The co-founders counted on the loose associations with Moroccans and Americans in the early years and during the expansion phase. The school director counted primarily on the employees of the Fez school, some members of the Christian church, and an acquaintance with a member of the royal family.

Category 2: Entrepreneur agency. The activity of the business was created and engineered by the drive and resiliency of the entrepreneurs. Brinckmann et al. (2010) concluded that in cultures with high levels of uncertainty avoidance, culture, and more specifically, socio-cultural factors influence the nascent entrepreneurial process.

Interviews, field notes, and conversations reveal the effort exhibited by the co-founders and, later, by the school director in the pre-planning, implementation, and expansion phases.

Pragmatic case 4.2.a: Gathering toys and books. M. Forciea began her movement towards building the school in Fez by gathering donations of toys, puzzles, and other instructional materials she knew would not available in Morocco. She reported driving to book giveaways to collect materials she would eventually take in large suitcases to Morocco. Even after she returned to Austin, Texas, she collected books and toys from her children's collection, church members, and teachers she knew and took them to Morocco once a year.

Pragmatic case 4.2.b: No roadmap. E. Lozano characterized the Hasbrouck-Forciea's plan when he met them in Austin, Texas, before they moved to Morocco as exploratory. He states they did not have a specific month-to-month plan or timeline with objectives. Some employees who had been hired were experienced teachers and others were not. He recalls that the lack of a plan was not an obstacle to him because he planned to use the Texas Essential Knowledge and Skills objectives as a roadmap and pattern the curriculum after the Austin Independent School District scope and sequence.

Pragmatic case 4.2.c: Hit the ground running. J. Hasbrouck recalled how they "hit the ground running" when the family of four arrived in Morocco on May 1 of 2004:

> There was just a necessity. I think, just speaking for me personally, I quit a job where I was making buckets of money. It was like, I'm not gonna come here and sit in the apartment and wait forever for something to happen. For me to be here for a year just cost me a ton of money, so I'm gonna make it as worthwhile as possible. We worked so hard. There was never a day where you weren't up trying to meet with somebody, network.

He added another element: urgency:

> You got to build really quickly. It was very intense. Several months of just learning and doing things as we go. Not being afraid to do something wrong. I think it was helpful to have a short time frame in one sense because we didn't have the luxury of time to overthink things. There were numerous things where we would talk to somebody, interview them, get a good feeling and say, "All right, great, here's 5,000 dirhams. Here's the deposit. I want you to be our fudicier [accountant] and help write the SARL [Société à Responsabilité Limitée, or a limited liability corporation]." Then we would talk to somebody else and say, "All right, what building are we getting?" It was just, having that urgency and with the school, you can't miss the launch date. If you miss the fall, you might as well not open. For us, it was like, all right, it's got to happen by September 1. We need to have enough information, so we could sign people up two, three months beforehand. As much as that could be stressful, it also worked to our benefit because we just didn't have the luxury to entertain too many offers. Once we found something that was adequate, we were very quick to make decisions.

Episodic case 4.2.d: They don't give up. Mourad Bensellam, the first employee of the school, was hired as the guardian of the school building as they finished construction in the summer of 2004, and later as a sports, or physical education, teacher. He says he admires the co-founders and their family because "they stay strong. They (do) not give up."

When the school faced obstacles the first year, Mourad recalls that the co-founders went to the American Embassy in Rabat and, even though they didn't know anyone, they managed to get the Consulate to come to the school in Mount Florid (the first location of the school) and speak on behalf of Americans living in Morocco. He was very happy that they began anew and added, "That's why I like America; (they) don't give up. That is good."

Episodic case 4.2.e: Create a non-profit to save school. After the first year of serious legal, administrative, and financial emergency that caused them to lose students and finances and crippled the operation of the school (more details in Category 4: Leveraging Contingencies), the founders faced a critical and severe financial hardship.

J. Hasbrouck, the school business manager, announced that the school could only open the second year if 50 students or more registered and paid full tuition. M. Forciea knew it would be difficult to recover from the loss and recruit enough students to cover expenses for the second year. So that summer, she and her colleagues in Austin responded by creating a non-profit, 501(c)3 organization called American Educational Fund. The Fund accepted American tax-deductible donations to support Moroccan and American students attending the Fez school and thereby saved the school from financial peril.

Table 9

Type of and Primary Reason for Relationship

Type	Description	Reason for contact
Industry organizations	Individuals or organizations providing services related to enterprise operations	To consult on teacher recruitment or industry standards
American community	Supporters or acquaintances	To provide logistical or financial support
Clients	Consumers of services	To leverage market advantage
School administrators and employees	Purveyors of services	To provide educational services
Moroccan community	Supporters or acquaintances	To share cultural or business expertise

Category 3: Co-creating relationships. Relationships were built in Fez and Rabat around professional and personal connections. In the initial years, the co-founders relied on their existing relationships with industry organizations and American supporters. When they returned

to operate the school in 2009-10, they initiated and re-invested in their relationships with Moroccan clients, American and Moroccan employees, and the general Moroccan population. Table 9 outlines the types of and primary reason for relationships in Phase One.

Pragmatic case 4.3.a: Pull up two semis. R. Nichols was the president of Teach Overseas, an international teacher recruitment company, when M. Forciea served on the board of directors. He was supportive of the opening of the school in Morocco and responded by recruiting teachers soon after the decision was made to establish the school. He even suggested that they "pull up two semis," put a tarp over them and teach student under the tarp.

M. Forciea had worked with R. Nichols, knew that he did excellent cross-cultural training, and had experienced the training:

> They all did this 6-week training in California. They talked about those things, being flexible, culture shock. They trained them on how to teach English to people who didn't know English. They gave a small library of books. They gave them practice in, you know, teaching in the community to people who didn't speak English. They talked about culture shock and what you do, you know, when you've gone through your culture shock. They also were supplying support as far as some retreats during the year. R. Nichols would come out and visit them to kind of care for them, team care, types of things. I knew that those four (teachers) were going to come prepared for an ambiguous class cultural experience.

Episodic case 4.3.b: UT Austin provides classes. As the school grew and expertise was needed to offer upper level math courses, the co-founders knew they needed to do something. They had teachers of general subject areas moving to Morocco, but without competent teachers, students would not learn the technical language required to perform well on SAT and ACT tests and be admitted to American universities.

The co-founders met with the coordinators of a new online high school program and were able to strike a deal. The school was able to offer foreign language courses to their students and Fez American school students were able to take calculus. Eventually, what the University of

Texas High School Online director allowed was if the American School student took even one class at the cost of U.S. $130, the student would also receive a UT Austin High School diploma.

Episodic case 4.3.c: A broadly defined SARL. The fudicier (accountant) was recruited out of necessity in the first few months of the co-founders' arrival and played a pivotal and enduring role in the school's legacy. J. Hasbrouck recounted the struggle to create a for-profit business that provided education. A school operating as a business and not as an educational institution was new to Morocco. All schools reported to the Ministry of Education of Morocco and were either considered a public school operated by the Moroccan government, a diplomat or mission school operated by representatives of a foreign government, or a Moroccan privately-owned school. The accountant wrote the SARL "very broadly and ambiguously," according to J. Hasbrouck. He added that this general language allowed the co-founders to defend themselves. The co-founders and, later, the principal, would say to their critics, "we incorporated a business to do education in Morocco. That's what we do. We're authorized. We pay taxes. We run our business. That's what we do. We are not part of the Ministry of Education because we're not teaching Moroccan education."

Pragmatic case 4.3.d: Help from American friends and family. While the co-founders used most of their personal funds to operate the school until it became self-sustaining, fellow church members in Texas made contributions of various types. Several families contributed financially to the non-profit 501(c)3 organization called American Educational Fund, while others recruited members of their families or the church to live and teach at the school in Fez. Some people sent books, supplies, and even food items not available in Morocco, like maple syrup.

Pragmatic case 4.3.e: Families help because education is at stake. Several interviewees named the families that really helped a lot those first years. Two of the male interviewees mentioned playing golf and having coffee with a few fathers "because they are a male dominant society. They are the ones that came to the school to pay tuition." They often invited the founders, principal and American teachers to *Ftur* (meal at sunset when Muslims break their fast) during Eid.

The former principal, E. Lozano, reported that "once you get past the façade of, you know, I'm Moroccan, you're American and you're in my country, and we're gonna follow these rules," parents helped advance the school because "they knew that their kid's educational future was at stake":

> Once they realize that your existence is better for their kid's education, then they're all in. I had a lot of these dads when it came time to move from one building to another, they were more than willing to drive around and look at some of these houses to see which ones would be adequate. They would do all the talking. They would tell me, "Don't open your mouth. Because if you open your mouth, (they will) find out you're American, (and) the price will go up 1500 dirhams!

Episodic case 4.3.f: Christmas flight paid by a Muslim father. The founders spent a great deal of time with students and their parents as well when they first moved back to Morocco in 2009, and learned that mixing social and professional relationships could be difficult to maneuver but rewarding for both parties.

After one of the pre-Christmas visits when M. Forciea came to visit Morocco, she was flying back to Texas and one of the fathers of a student, M. Bouzouba, volunteered to drive her to the airport to catch her 4:00 a.m. flight. When she arrived at the ticket counter, she was told that she could not board the flight because she needed to have a paper ticket that she could only get at the downtown office, which was closed at that hour. She pleaded, then argued, then began to cry as this meant she would not be home with her children and husband for Christmas. The father of the student stepped in and, in Arabic, had a long discussion with a person in the office. Some minutes later, he came out and told M. Forciea to hurriedly board the plane. M. Buzbouba had written a check for a one-way ticket that would get her home.

Episodic case 4.3.g: Trusted first school director allegedly steals U.S. $35,000. The first school director was S. Louali. She was from Meknes and had been involved with a private school with Meknes. Her daughter, H. Louali, lived with the founders in Austin for a short time. She was a teacher assistant at the Lycée Français, where the founder's children attended school, and a student at the University of Texas at Austin. S. Louali's husband assisted with development in the months before the school opened and, later, served as an Arabic teacher.

J. Hasbrouck said, "It would have been impossible to do it [start the school] without them." The founders talked about how S. Louali and an assistant put up flyers in chocolate shops and cafés in wealthy neighborhoods in Fez, then talked to customers about the school. Later, they hosted teas or coffees at a resident's luxurious home or the Pharmacy Country Club to advertise the opening of the school. The landowner of the property where the school was built hosted one such gathering at his home. At the gatherings, the founders shared information and S. Louali or a French-speaking acquaintance would translate. It was in this way that the school recruited its first 15 to 20 founding families, or about 40 students.

The founders gave the Loualis a lot of authority from the beginning. While the building was under construction, in preparation for its opening in the fall of 2004, they allowed the Moroccan couple to utilize the large offices. They could answer questions about enrollment and the school in French or Arabic. The American couple used the basement office.

M. Forciea called S. Louali her best friend. The co-founders let S. Louali's daughter live with them for free in Austin and use their car, and they even sent her money while the co-founders were in Morocco. M. Forciea reported that S. Louali was about 50 and had had an arranged marriage. M. Forciea believes she was not happy. She met her husband the day before she married him. She was well-educated and spoke only French, and he spoke only Arabic. He was significantly older than her, poor, and very traditional. S. Loauli confided in M. Forciea that she would often leave him and go back to her parents.

In late November, the owners of the school sat down with the director and asked for an accounting of all tuition payments based on enrollment. Since S. Louali would not give them financial reports, M. Forciea walked around the school and counted the number of students and calculated the amount of tuition that should have been received.

> Where did the money go? We have these many students, but she didn't want to tell how many students we had. She didn't want us to know. So, how are we not making payroll while we have to keep paying from our American funds? How could that be? Then, she got on the phone, started calling parents and said, "You need to pull your kids out of the school. They're teaching the bible. They're treating the foreign kids better. They give different curriculum, and A. Benchir and M. Bensellam (two school guards) are molesting the girls."

J. Hasbrouck added:

> For whatever reason…she was nervous about our authorization, what we were doing, and started taking money and putting it aside and never telling us about it. It ended up being, we calculated, around $30-35,000. And at that stage of the game, I'm like, "hey, we need that money for the school." So, we got rid of her in January 2005 and that's kind of a crazy time. She tried to sue us.

Pragmatic case 4.3.h: Mourad's soccer tournament. Mourad and Najat Bensellam have worked at the Fez America School for 15 and 14 years, respectively. They were two of the first Moroccans the family worked with, so they have a strong relationship with the founders, especially with M. Forciea, who has remained as the school director since 2009 when the family returned to Morocco. J. Hasbrouck returned to the United States in 2013.

A critical incident in M. Bensellam's memory about the family is that during Ramadan 15 years ago, there were soccer tournaments organized in Fez and he asked if he could leave by five o'clock because he was playing for one of the teams.

> Ms. Michelle told me, "I want to go see you. I'm coming to watch you." I remember that time. She (is) coming and she watch me play soccer. And she say, you are professional? And I say, of course. I play in Morocco team, sometimes with small kids. She say, ok you can do sports for us. I was first staff for American School. I remember everything in my life. I told her, "Ms. Michelle, (you are) always close to my heart."

Episodic case 4.3.i: Mourad punishes assailant. As a teacher working for the American School Fez in 2012, I witnessed M. Bensellam acting in his capacity as the guardian of the school. One mid-morning another teacher and I were walking back to Fez elementary campus from a coffee and pastry break. A young boy about 14 years old rode his bike on the sidewalk and grabbed my breast as he passed me. I was shocked and yelled obscenities at him in English and a few I knew in Darija. He laughed as he biked away. As I walked through the school gate, M. Bensellam asked what happened and I told him. He bolted out the door and down the street. There was only one boy on a bike going down the street in front of the school, so Mourad chased him on foot. Another guardian, A. Benchir, let me in the building and I went to teach math to my first graders. After about an hour, Ahmad called me and I followed him outside the school gate. M. Bensellam had chased the boy for about three miles, pulled him off his bike and dragged him back to the school. When I identified the boy as the one who had grabbed my breast, M. Bensellam proceeded to slap him, punch him, and yell at him. He shouted, "These foreigners come from very far away to teach us, to help us, and this is not how you pay your respect to Americans. They are noble people who work hard and have kind hearts." He slapped the boy's head as he emphasized each key word. M. Bensellam's shirt was soaked with perspiration and his adrenalin was still high from the running, dragging, and punching. I said I forgave the boy and asked him to let the boy free. I told the other guardian to bring M. Bensellam's wife, our secretary, to calm him down. When she arrived, she began to ask the boy questions and her husband let the boy go. He told him he should not do anything like this again to any woman. The boy cried, apologized on his mother's life, and said he would never touch a woman again. M. Bensellam praised him for his apology and reminded him that I had forgiven him. Bensellam hugged the boy and called him his little brother.

Category 4: Leveraging contingencies. As a business is implemented, efforts may not produce the intended plan. Typically, something negative or detrimental may happen, such as the product may not be as desirable or in demand as originally anticipated, or the supplier may not be reliable. What an entrepreneur does with this trend to turn the negative into a positive, or a damaging trend into a beneficial upswing is considered a leveraged contingency.

Episodic case 4.4.a: Stray dog in Chefchaouen. When the school director, S. Louali, allegedly stole the U.S. $30,000 to U.S. $35,000 from tuition payments in the first few months of the school opening in 2004, she sabotaged the school's and the owner's reputation with false accusations. She claimed that the founders were attempting to evangelize the Muslim students to Christianity. She claimed that they were using less stringent academic materials and instruction with Moroccan students versus their American counterparts and that they had hired guards who were molesting the children. She also accused the founders of tearing the Qur'an. In January 2005, the owners released the school director from her duties.

The accusations had a direct impact on the school, as day after day, students were pulled from classes until there were only American and a few Moroccan students left. One day, many parents came to the school and demanded that the owners defend themselves against the claims made against them. The meeting had been organized by S. Loauli with the objective of confronting the school owners. The meeting became a chaotic screaming match in several languages as the school owners attempted to explain each allegation. After a few hours, the couple fled to the newly constructed McDonalds near the Fez Medina, and then later to a nearby mountain village, Chefchaouan.

The couple ignored the numerous calls they were receiving and took a few days to reflect on the situation. They took stock of their finances. They evaluated the relationships they had built and what they called the short, but impactful, few months of service.

Both owners separately tell the story that it was a stray dog that helped them decide what to do next. As they walked around the Blue City, as Chefchaouan is called due to its brightly painted blue buildings, their daughter Kiara was followed by a scruffy dog. She fed it, gave it water and begged to keep it. The parents tried not to commit because they said they both knew if they said yes to the stray, it meant they were staying in Morocco. Eventually, they agreed to keep the dog and agreed to meet with a few parent representatives.

J. Hasbrouck met with a few fathers and answered all their questions about why there was a Holy Bible in the drawer of a young teacher. He told them how M. Forciea had taken down some Qur'an quotes from a white board because they had been inappropriately glued, that she had not torn a Qur'an. He explained that the Moroccan students received the same curriculum and instruction as American students, but the reading and writing had to be scaffolded for Moroccan English Language learners as part of their second language learning instruction. After several hours, the families conceded that the owners were telling the truth and their intentions were not properly represented by S. Louali.

This meeting resulted in the families making a renewed commitment to saving the school. They all paid their tuition and recruited new families to attend the school. Finances were restored, and the school programs expanded for the second year.

Pragmatic case 4.4.b: Short launch time collapsed work effort. The owners arrived in Fez in May 2004. They planned to open the school in September 2004. They did not speak Arabic or French. They knew only two or three Americans who spoke some Arabic and two Moroccans with limited English fluency. The completed school building they intended to rent was rented to someone else. They decided to build out a shell of another building, even though they had no knowledge of building construction permitting and practices in Morocco. The family worked through the hottest months of the year while living in an apartment and working in a school site without air conditioning or fans.

One founder declared that the short period for launch was a stressful aspect of establishing the business and was a critical factor in less than optimum business decisions, but he argued that the sense of urgency collapsed the work into a short time frame. He stated:

> Most weaknesses also have a strength to them, too. We just didn’t have time to vet things... with the same patience that you might want to. The same thing like, our relationship with the Loualis. We didn’t really know them. We had met them a couple of times. I knew their daughter. But we got into this, but it was just, okay, we’ve got to be together almost every day for that whole summer. There was no margin for giving up 2 days, or 3 days. We pressed things. If there was a day or two, or something didn’t happen, we were the squeaky wheel immediately, we’d go, “All right, what’s next, when’s that gonna happen? Who’s gonna do this?” I think that helped our working relationship with the Loualis. Certainly, early on before the negative stuff started happening, we were eating meals together, we were doing everything. We overcame a lot of the lack of experience with each other. Just accelerated all that time. More intense engagements.

Episodic case 4.4.c: American ambassador’s visit. Fez is a village of over half a million. After the accusations had been made about the school and the Moroccan director had been fired for theft, the school began to attract attention. New parents requested information about the school, but an important feature for them was the school's authorization status with the Moroccan Ministry of Education. As mentioned previously, the owners registered as a business providing educational services and, therefore, told potential clients that the school did not need authorization from the Moroccan government. Parents argued that the school was not following the law and soon, articles in the newspaper appeared accusing the co-founders of taking people's money for education without any sort of authorization from the government. Protesters said the school should be closed and the co-founders were reported to the local authorities. The gates were locked for a few days under the direction of the municipal leaders.

As a result, in April or early May of the first school year, the owners paid the American Embassy a visit. They were not accredited by an educational body yet. They were not authorized by the appropriate Moroccan government agency responsible for the education of Moroccan children. They did have a SARL establishing them as a business.

There was a new representative at the American Embassy: Thomas Riley. Then President George W. Bush appointed Riley Ambassador to Morocco in December 2003 and he had just assumed his post as Ambassador in January 2004. The founders met with him in the spring of 2004. J. Hasbrouck recalled the meeting:

> I think he was a roommate of George Bush's at Harvard. He was a little naïve, very, very bright guy, but kind of naïve as to all the politics of Morocco and everything. It was supposed to be a 30, 45-minute meeting. We ended up being there for two hours, laughing, going through slides and all that. He says, "Look, I don't know what I can really do legally here because my hands are tied. I can't just go and deviate some laws of Morocco about how they deal with public or private schools. But what I can do is make a visit to the school. There's bunch of Americans there. You're an enterprise." So, he came to the school in that spring. That was another huge, huge thing that got everybody off our backs.
>
> Obviously, there's security all over the neighbourhood. I got to drive in the motorcade with him. They shut down the roads and everything. We stopped all the stop lights. They had cops escorting us from the hotel to the school. That was really differentiating. It was really a monumental thing.

M. Forciea agreed that the visit had an impact:

> The ambassador comes flying in a fast, black car with a stream of cars behind him. His guards were standing there and they opened doors as they pulled up to the school and then the ambassador gets out. We had a group of people who were taking pictures for the Facebook page, and then we just kind of walked around. We went to the courtyard and he had said a few things and I gave this speech.
>
> Nobody ever came and bothered us again. So, I think the ambassador kind of knew what he was doing, "Well, I'm going to show my support." You know, it almost like he was, "All right, I won't write it down on a piece of paper, but I'll show up and I'll make a big deal out of it." And then nobody touched us again.

Episodic case 4.4.d: Incidents promote support from Americans. The financial crisis created by the alleged theft of about U.S. $35,000 in the first school year spurred the creation of a 501(c)3 in America that provided scholarships for Moroccan students and, therefore increased revenue for the school in the critical second and third years of development.

As the owners shared the many incidents and struggles of the first year of opening a school in Morocco with neighbors and church friends when they returned to Texas and Minnesota, many families rallied around them to launch a non-profit organization to raise scholarships, gather financial gifts to directly support low-income Moroccans or children of missionaries that attended the school, and raise awareness of the overseas school through digital message sharing. The supporters were able to raise scholarship funds to subsidize operations in the second and third year, until enrollment increased, and the business became self-sustaining.

Category 5: Affordable loss. The objective of affordable loss is to set a limit of acceptable damage a business can handle before it is no longer considered a viable endeavour.

Pragmatic case 4.5.a: Using personal funds as needed. The entrepreneurs of this study stated they did not have a specific figure in mind of how much money they would invest in the enterprise prior to moving to Morocco. They designed an initial budget in the business plan in which they estimated personnel, materials, and facility lease and operational costs.

When faced with a loss, they used personal funds on an as-needed basis to finance the first few years of the school's operational needs.

After assessing expenses for the first complete year of operation and completing a break-even analysis, J. Hasbrouck revealed that the school would require 50 students paying full tuition to cover all expenses with no profit. Enrollment in year two fell below the target by 15 students.

Pragmatic 4.5.b: Get out of here! I'm not paying you anything! To prevent further loss in the second year, the principal had to take some stern positions with self-identified debtors. Parents and teachers who worked for the school the first year claimed to be owed money in the form of a refund from the previous school year or severance pay.

> They'd come back and say, "I want my money." I'm like, "what are you talking about?" "Yeah, you owe me 30 grand, or 30 thousand dirhams." "I'm not gonna give you nothing! Get out of here. Who are you? I don't even know you! You want me to give you 30 thousand dirhams, you're crazy! Get out!" I ran off a couple of the teachers. They're like, "you have to pay us severance." "I'm not paying you severance." "Well, you have to pay, the French schools do." "Well, this is not a French school. This is an American school. We're going by American rules. I'm not gonna pay you any severance." I guess that helped. It comes with being an administrator in a public school, dealing with parents, dealing with kids that were unruly.

Pragmatic case 4.5.c: Might end up in Moroccan prison. Aside from the financial toll to the family, there was a different kind of risk that they had not included in the equation of establishing a school in Morocco. The parents who opposed them and sided with S. Louali filed personal lawsuits against the owners. If the courts ruled in the Moroccan's favor, it was possible they could have had to pay more fines or face incarceration. M. Forciea explained, "Bo (J. Hasbrouck) refused to stay. I think he was like, 'I can't take this anymore. I'm going to end up in a Moroccan prison. We're leaving.'"

At the end of the first year, the couple returned to Austin with their children. J. Hasbrouck said they needed to "cut their losses."

Category 6: Interactive socio-cultural context. Under this category, there are two sub-categories: activating transnational positionality, and managing cultural behavior. Both refer to how the entrepreneurs and the host country actors maneuver around each other to create a unique business dynamic.

Under the sub-category of activating transnational positionality, there were two trends in the data that responded to the need for understanding the social-embeddedness of entrepreneurship: a geo-political dimension of market entry, and physicality.

Pragmatic case 4.6.a: Meeting Moroccan Ministry of Education requirements. Within the sphere of geo-political dimensions of market entry, J. Hasbrouck explained that Morocco in 2004 was a very tenuous and uncertain business environment for internationals:

> Morocco kind of shocks people and makes them run for the border and get the hell out, or they feel kind of intrigued with the people and how culturally monolithic they are. In one sense, they don't move quickly. They really retain their culture real heavily. And I think this [understanding] was probably shaped by our time in China and Hungary. I don't think that whole culture shock, if you will, scared us off. It probably intrigued us more.

This monolithic and stable characteristic was especially true of Fez, which is considered the spiritual, cultural, and intellectual capital of Morocco. There was only one other international school in 2004, a French mission school.

Further, the bilateral free trade agreement between the United States and Morocco, signed in June 2004 and entered into force in 2006, did not include educational services in its provision of goods and services.

Five American schools in Morocco receive financial support from the U.S. State Department because they provide educational services to families of diplomats, nongovernmental agencies, and international envoys. The list includes American School of Tangier established in1950; Rabat American School established in1962; Casablanca American School established in1996; George Washington Academy in Casablanca, opened in 1997; and American School of Marrakesh, opened in 2005. The mission statements of these school include mutual cultural exchange.

While other cities in Morocco with smaller populations than Fez have hosted American schools since the 1950s, there has never been a school under the auspices of the U.S. government in Fez.

Additionally, private international schools not under the auspices of their government must register with the Moroccan Ministry of Education. They dictate the number of hours each subject, like Math, Science, and History must be taught in Arabic. They also mandate that each school teach 10 hours of Koranic studies per week. As a school with the intent to ensure academic English fluency for admission to an American university, these requirements are burdensome. Informal conversations with parents and teachers of non-U.S. government English-speaking schools in Morocco reveal that schools may provide documents to the Ministry of Education that abide by their regulations, but the day-to-day experience may not exactly represent what is submitted to authorities. They must spend more time than presented in order to ensure English language development.

Finally, students who enrolled in the American school in Fez in 2004 were entering into a low-risk educational situation. Most of the students were primarily enrolling in pre-school to Grade 6 classes, so the risk of not obtaining a high school diploma was not an issue at that time.

Pragmatic case 4.6.b: Looking/not looking American. Physicality is the concept of relating to the presence of the physical body as opposed to the mind. The physical appearance (height, weight, hair, and skin color) and genders of the co-owners played a role in business dynamics.

The blonde, blue-eyed Midwesterners reported getting a great deal of attention when they went about their normal routines in Fez, like going to the *hanut* (small store that sells necessities, like water, tea, and eggs), the French chain grocery store, or the local cafe. This happened because they lived in a middle-class apartment in a middle-class neighborhood, away from the tourist parts of the city where Fessis were most likely to see blond Americans. The family's presence and limited knowledge of Arabic made them a curiosity. English speaking and limited English speaking Moroccans would ask them questions and often take an interest in the school as a possible educational avenue for their children or family members. The fact that the inquiring person could communicate in limited English indicated that they had a pre-disposition to, or interest in, developing English or knowledge of American culture.

J. Hasbrouck returned to the United States and M. Forciea and their now-teenage children stayed on in Fez. M. Forciea reports that complete strangers wanted to help her. She attributed this to her gender, height, and petite body profile. She recalls a time when, between the time she landed in Casablanca and when she arrived in Fez, nine different people tried to help her. They helped her with baggage handling (for free) and gave her the front seat nearest the air vents on the van. This also occurred when attempting to get information, such as where to buy school cleaning supplies or school furniture.

The opposite was true when it came to fee schedules. Their physicality was a relevant sizing up factor when a retailer considered sale price. The fact that they were blond, blue-eyed Americans living and doing business in Morocco gave Moroccans the impression that they could afford to pay more and, consequently, prices were substantially higher for American business people than for local Moroccans making the same purchase.

E. Lozano alluded to this price differentiation in the section on relationships with parents, but his physicality was unlike the co-founders'. Lozano is medium height, tan complexioned, and with dark hair and brown eyes. Moroccan sellers would not associate his physical appearance with an American, so parents would tell him not to speak in front of the retailer or landowners and thereby give away his nationality.

Another observation about physical characteristics in business transactions was that men treated female American business people as equals. M. Forciea began a business roundtable in 2005 in which community members and business owners could gather to discuss business climate and opportunities. They elected her president. She said:

> I think they think because I'm a foreigner, maybe I'm not fully female, (laughs) or it's different, or something. The board was conservative Christian men and religious Muslim men, and they voted me the president, the only female. I honestly am not aware of any gender discrimination that I've experienced. Maybe that's really naive to say. I've experienced gender discrimination, but it wasn't in my job running the school in Morocco.

Sub-Category: Managing cultural behaviors around finances. As with the previous sub-category, there were a few trends that affected the entrepreneurial process in the first years: negotiation of fees for services and goods and the perceived expectation of discounts based on friendship.

Pragmatic case 4.6.c Negotiation and collection of tuition fees. To a public school administrator and teacher, school tuition is never a topic of discussion. In America, tuition in private schools is set by the board of directors and collected by administration. In Morocco, there is a historical tendency to barter based on vending practices used in the longest-occupied commercial locale in the world, the Medina of Fez, since its establishment in the 9th century. These practices are active today.

E. Lozano incredulously announced in an interview:

> They want to barter. The Moroccan parents, dads wanted to barter. To them it was bartering. Let me knock down the price of your tuition. I'd say we're going to charge you seven thousand a trimester ... They try to say, "well, I'll give you five thousand." It was something that was totally part of them. How are you going to barter your child's education? You want your child to get a good education, yet you want to barter like if it was apples. That was totally foreign to me. I was, like, "wait a minute, this is not up for negotiation." Then, of course, when it's time for them to pay for the second trimester, "you know what, I don't have seven thousand. Let me give you four thousand and next month I'll give you three thousand," stuff like that.

M. Forciea echoed this difficulty with the tuition collection. The school began with a tuition system used in universities: you pay for the semester within a specified time frame after classes begin. It did not work. She said, "Trying to get them to pay the full amount that they're supposed to pay is always challenging. I've talked to other business owners here [in Fez] and they were saying, 'Well, it is impossible to run a business, because people don't pay'."

The founders implemented several strategies for countering this bartering for tuition, such as having a committee decide the discount percentage, spreading payments into deposits for the following school year, and three equal-sum payments in months where there are no significant religious/gift-giving Moroccan holidays. They also began blocking parents' access to the online grading and attendance system until they were current with tuition payments.

Additionally, M. Forciea assigned a stern Moroccan woman with a very direct approach the job of handling tuition payments and exceptions. She refused to communicate with parents regarding tuition, but ultimately made the decisions about discounts, fee forgiveness, and acceptance of late payments.

Pragmatic case 4.6.d: Bartering for school services. Costs for material goods and supplies were fixed, such as paper, hand soap, books, office supplies, and folders because they were purchased at chain stores with standard, published prices and delivery methods.

Other costs for services were subject to bartering. E. Lozano and the co-owner acknowledge that improvements and repairs to the school building were always open to negotiation. First, they started by asking families if they had someone who could do it for free, or if they had a worker in their business who could provide the service. Next, they would ask if families knew someone that could make the repair at a fair price. It was usually the last resort to hire an unknown vendor, and even then, Lozano would ask his secretary, who he called a bulldog, to solidify the rate before the work was done.

Pragmatic case 4.6.e: Board member discount. As time passed, the distance between the owners and clients decreased. Fez is a small city for the middle and upper-class in that one frequents the same salons, stores, and fitness centers. In this way, the couple began socializing with the parents of students. M. Forciea stated that friendships were often tested in a way she did not expect:

> It was really opposite [of] in America. In America, if you're a board member, you're one of the first to pay your tuition. If you're a board member [here], they want a really good deal. They want to not have to pay their tuition if they're a board member. If they're a good friend of yours, then they want a good deal and not to pay at all.

Category 7: Key constructs of entrepreneur. As previously noted in the section about partnerships, there are specific tendencies that attract certain people to work in countries with a high level of certainty avoidance. This category finding is significantly different from means orientation, although both involve the characteristics of an entrepreneur.

The key constructs of entrepreneur category alludes to the motives and behaviors of an entrepreneur. This concept differs from the means orientation of “Who am I?” because that is defined as an inventory of the skills and knowledge that the entrepreneur possesses.

Three sub-categories emerged within the category of key constructs of entrepreneur: ability to recognize entrepreneurship in others, drawing upon entrepreneurship experiences, and perseverance.

Recognition and recruitment of entrepreneurship.

Pragmatic case 4.7.a: If they didn’t laugh… M. Forciea described her recruitment strategy as follows: “When I first started talking about the idea of starting a school in Morocco back in Austin, Texas, I would tell people I want to start a school in Morocco. Most people laughed at me. The ones who didn’t laugh, I invited to be on the team.”

J. Hasbrouck described the American principal, E. Lozano, as being good at dealing with ambiguity. He had credibility as an educator and didn’t get uptight when things were unknown or did not go as planned or intended. He was good at filling in gaps. M. Forciea added that he did it his way and persevered through the early years of development.

The owners started an English Language Institute a few years after they returned from Austin. One of the administrators they hired to manage the institute designed her pay scale as base pay plus commission. She added two levels within the three English proficiency levels that already existed, thereby extending the number of sessions a student would have to attend and pay for before reaching the completion stage. When the school relocated to a busy thoroughfare, additional signage captured additional clients.

Another Language School manager, S. Quinn was described as a person who, if she “needed to sit at this Moroccan Festival for three hours and watch them play Gnawa music” to accomplish her goals, would do it. She served as a Peace Corp volunteer in a rural village outside of Marrakesh for several years, married a Moroccan man, and was familiar with the patience and tenacity required to complete a project or goal.

The current Language School manager came to Fez as a middle school language arts teacher in 2011. She had a difficult time properly teaching as she was used to teaching in the United Kingdom, but she didn't give up. M. Forciea recalled:

> I remember when she came. We would sit down probably every other day in her first year. And she'd be like, "My class is failing. It didn't work. This didn't work." I go, "Okay Alia. We're going to hit the reset button. What can we do to make your class work?" She would sit down, and she would super-analyze, but she just kept going and kept going until she became a master teacher. Because again, she had the courage to say, "Yeah, I'll do that (again)."

Pragmatic case 4.7.b: A dreamer with gifts to give. Another characteristic of persons who sought out the school as a place to work was being a dreamer. Many of the teachers interviewed in the early years were with Teach Oversees and had an interest in making a difference in the world. M. Forciea reported that they were people who didn't see obstacles, only possible solutions. Some improved the petty cash system in the Finance department. The teachers and I worked to develop the scope and sequence system that eventually helped with school accreditation. A renaissance program was added after school in order to offer extracurricular classes, like painting or Spanish. The classes changed every other year because the teacher talent and expertise changed with teacher contracts. According to M. Forciea:

> People choose to use their gifts to impact other people's lives, just kind of giving their life away, giving their gifts away. Somebody (else) could say I could use my gifts, make a lot of money, and live a very comfortable life and that's ok. But it's not what we're looking for. We're looking for people who want to take those gifts and bless Morocco and maybe go beyond.

Pragmatic case 4.7.c: Risk-taker and flexible versus teaching experience. Teacher recruitment happened year-round for the start of each academic year, but sometimes teachers leave mid-year. Finding another English-speaking teacher to cover a grade level or subject during the year was tough. M. Forciea stated:

> I don’t know if this is right or wrong, but I am really more concerned with who they were as far as being a risk taker, and flexible and willing to just step out and try it, rather than being concerned with their teaching experience.

She feared that if someone had substantial years of experience in a highly structured teaching environment, “this might drive them crazy.” In 2004, the co-founders had to say to a group of teachers, “okay, well, we really don’t know what we’re doing and we’re, you know, kind of figuring it out, and trying to teach.” They reported needing people who could be flexible.

Pragmatic case 4.7.d: Teacher’s ambiguous class cultural experience. Morocco is in Africa, and even though it is a 35-minute ferry boat ride from Spain, it is very different from most middle-class American's international travel experiences. Many of the teachers recruited in the early years were primarily white, Christian, and college-educated from the Midwest or West Coast of America. They attended a 6-week training on how to deal with culture shock, curriculum on teaching English, and self-care in an international setting. The founders were confident that, with this training, teachers would “come prepared for an ambiguous class cultural experience” in Morocco. According to the founders, most did well enough, but in the fall of the first year, as the founders were dealing with the alleged theft of about U.S. $35,000, a group of teachers requested a meeting. They told the founders that they were terrible leaders and that the founders didn’t know what they were doing. They said they didn’t plan well and that things were a mess. Many left at the end of the school year. Some wrote to the co-owners years later apologizing because after years of trying to launch their own endeavors, they realized how difficult entrepreneurship could be.

Pragmatic 4.7.e: Sitting around a table problem-solving. M. Forciea recognized that it takes people experienced enough to know some things and not give up and people young enough to still dream. This combination was important because it created a cumulative problem-solving muscle where each person viewed their segment as highly contributing and highly impacted. According to M. Forciea:

> My favorite thing in the world is sitting around the table with people, like when I think about one of my happy places, it's sitting around the table with a bunch of people and saying, "Okay, here's our problem. How do you guys all see it? How can we solve this problem? How can you be part of the solution?" I'm amazed when it's a group of people sitting around trying to solve the problem how many different aspects (are covered). You have a principal go, "Okay. Well, how is this going to affect the kids?" You know, the language institute director. How is this going to effect the language institute and how is that…I want them to each think that their branch is the most important branch. I mean that's how it works. "Please keep fighting for that. Please Collette. Please keep thinking the Grand section…" She tells me that many times, "Michelle, Grand section (Kindergarten) is the most important year." I'm like, "Okay, I am so glad you think that. That's what you should think."

Drawing upon innovative entrepreneurship experiences.

Pragmatic case 4.7.f: My mom taught five chords. Neither co-founder earned a business degree nor had previously owned a company, yet there were elements in their history that revealed entrepreneurial experiences.

M. Forciea alluded to her mother when asked what made her think she could start an international school, admittedly not an adjacent experience to teaching middle school science in Austin, Texas.

Her mother and father divorced when Michelle was in middle school. Her mother bought houses and remodeled them, using her newly acquired sheet-rock skills. She taught M. Forciea to tape and float and she re-roofed her own house. She opened a small store that sold various things and started a guitar school. M. Forciea said of her mother:

> I remember she'd always say, "Oh, my guitar students." All she had to learn was five chords. "I can teach that now. I'll teach my five chords. We'll gather songs off the radio." And at that time, there was not the internet. She would listen to songs. Every time they came on radio, she would grab a pen and a paper and write down all the lyrics, would figure out the chords and would go and teach it. It was so simple. This is how she ran her guitar school.

Her mother took the money she made from guitar school and bought a Xerox copy machine. She placed it in her basement and had a small copying service. As a stay-home mother, she had time to invest in typing lyrics to songs while writing the chords. She made photocopies and distributed the chords and lyrics to her students. One year, she had almost 60 students. She always started new things and got bored with things like cooking. She always figured out ways to solve problems and worked with what she had. If there was something she didn't know, she would try something and if that didn't work, she would try something else. "I grew up with that," said M. Forciea.

Pragmatic case 4.7.g: Lamenting a failed mission/dream in a luxury house. After the family left Morocco and assigned E. Lozano to serve as principal, the family went back to Austin. They had leased their house during their absence, so when it became available, they moved in, and M. Forciea lamented the sadness that came with moving back into the house. She cried as she rummaged through boxes to find, then hang, curtains in the house. The curtains were the same ones from her children's bedrooms that hung in their bedrooms in Morocco the year before:

> I was crying because I felt such a failure. There was a song playing that I love that said, when it's all been said and done… Something about when you've done all that you can and looked back at your life, did you do your best to live for truth? Did you do your best to love? I was like, "I guess we did our best." [Laugh] But I'm like I'm right back to where we were with a failed mission. So, that was really hard for me.

Her husband was determined to buy a new luxury house in the hills of Austin. When they did, she set up an office in one of the rooms. It was the office for Morocco. She would spend time on the computer figuring out a way to start a foundation, raise money and find curricula and materials for the school. Early some mornings, she would take her truck to school district out-of-adoption book give-aways and load them up for the Fez school:

> I'd stick them in storage and whenever we would move, Bo (J. Hasbrouck) would be like: "God, can we get rid of these old moldy textbooks?"
>
> "They are for my school! Don't you dare throw away my dream!
>
> This is my dream. This is pretty sad. This is pretty pitiful, (but) I'd carry these old moldy textbooks in each house.

Category 8: Faith. In the last months of data collection, the entrepreneur shared four personal journals kept from 2002 to 2005 in which she used to pray to God about a variety of things and jot notes about pending events and activities. Each journal was about 50 to 80 pages long. Entries were hand-written, and a majority were dated.

Pragmatic case 4.8.a: Four types of prayers. Three of the four journals had an introductory dedication in which the entrepreneur explained that she had strong faith that the words and prayers in the journal would be received with grace and love. She proclaimed her servitude to the wishes of God because she believed in His almighty power and omnipotence.

The prayer entries fell under four categories: pleading for personal strength and perseverance, an auto evaluation of a perceived weakness or character flaw that she requested help to change, the openness in the hearts of individuals whom she has identified as willing to serve in Morocco, and an openness of the hearts of Muslims to see the work they do as service to God.

Throughout the journals, M. Forciea recounted moments of doubt and helplessness, whether in response to her own family's ability, the church's support, or the general weight of the project. She wrote about the doubt and asked the Holy Father in very reverent language to supply the strength she needed to continue to work towards the establishment of the school.

At times, after certain exchanges, she was self-aware and named her reactions or interactions as less than good and positive. She would say that she assumed something to be true and responded defensively, or she responded negatively to someone who questioned the wisdom of the project. In most cases, she asked God to see more clearly and learn to accept the words of others in a constructive manner.

In the four journals, there were instances where the entrepreneur had attended a prayer service or Christian community meeting where the future (2002-2004 journals) or present (post-2004 journals) establishment of the school in Morocco had been discussed. She interacted or reacted in certain ways. When the exchanges were positive and contributing to the plans for the school, she exuded gratitude to God for the movement and commitment to the idea of the school. When the exchanges included people who were doubtful or unwilling to commit, she prayed for their hearts to be opened by God to the mission.

There were a few entries in which she reflected the involvement of H. Louali and her parents, who were Muslims. She wrote to God to ask that they see this effort as her devotion and love for her God.

Category 9: Uncertainty. There was an element of uncertainty throughout the interviews and journals. While there was an effort by the co-founders to control what was controllable, as exemplified by the business plan and purchases of out-of-adoption books in English, the journal entries and interviews revealed the presence of unknown factors that would impact the establishment of the school.

Pragmatic case 4.9.a: Opening a school in Morocco was not an adjacent opportunity. The co-founders admitted that neither founder had the experience required to operate a school in a foreign country. He stated that this was not an adjacent task, thereby admitting that there was a level of not-knowing involved in the process.

Pragmatic case 4.9.b: Second director googled Morocco. The educator who became the first principal in the second year of the school's existence said that, after the first meeting, he went home to look on a map to locate Morocco:

> The people that were running the class told me that they knew a couple that was opening a school in Morocco. I didn't even know where Morocco was. I had heard about it, but it's like, Morocco, where in the world is Morocco? This was in 2003. It's like I had to go home and google it. I was like, I didn't even know where Morocco was. We all went to the same church. They grouped us together and I started having lunch with them. The more and more we talked, the more and more I thought this could be a great idea.
>
> They were just bouncing ideas. They had no idea what the first step was going to be. They were just as in the dark, as I was. They didn't have any idea exactly how they were gonna do it. There was no, at least not with me, there was not, we never sat down and say, okay, August we're gonna do this. October we're gonna do this, September we're gonna do this.

The co-founders were developing the crew and the plan as they moved along. The principal said he liked the challenge of starting something new, but there was a high level of uncertainty of the conditions that they would encounter in this country called Morocco.

Pragmatic case 4.9.c: Push your way to the front to pay electric bill. When it came to logistical functions for the school, the principal commented on the lack of ease and the confusion associated with simple logistical operations for the school. There were routine protocols that befuddled the principal and cost him time and energy:

> I (was surprised) with the lack of order, as far as the Moroccan society. You have to go pay your telephone bill. You have to go get your electric bill. You have to make copies of something. There was no such thing as standing in line. There was like, just go up to the counter and push your way to the front and get the attention of the person at the other counter. There was absolutely no order. Jim and I would go pay the electric bills and it was like a madhouse. Consequently, after 2 or 3 years, even the telephone company, you

> started to get a ticket with a number and when they call the number you got up, but that wasn't the case [at first]. That was a big shock. [It was] weird.
>
> Then you got big Jim, he walks in. People send their guardian or chauffeurs to pay their electric bill. Here we are, paying the electric bill. Everything was brand new. We didn't know. We thought we had to go pay. That was basically the biggest shock.

Pragmatic case 4.9.d: We knew no one in Morocco. When M. Forciea was asked who else they knew in Morocco before arriving in Fez, she replied, "Nobody." They knew of the American businessman who had visited them in America, but he was not there when they arrived. There was only a connection with the parent of a young Moroccan whom they had met in Austin, Texas, to help them navigate the establishment of the American school in 2004.

Category 10: Authority as trust. Related to the element of uncertainty and faith, but distinctly different, is the category of trust. Due to the uncertainty, there was an element of trust that entered the decision-making strategies utilized by the founders in the early years.

Episodic case 4.10.a: Theft of tuition. That the school director was able to embezzle U.S. $30,000 to U.S. $35,000 in tuition while the owners were present is telling about the level of trust they had in her. The co-founders gave the school director a great deal of authority in the management of operations and finances. The school director met with parents, received payments, and maintained records regarding the number of students enrolled in the school. Given the language and cultural proximity of the school director to the parents, coupled with the authority of her position, she was able to hoard money without the knowledge of others.

Episodic case 4.10.b: Business loan and car sale. When the co-founders returned to Morocco, they discovered that the first principal, E. Lozano, of the school obtained a loan from a Moroccan financial institution in the amount of U.S. $5,000 without the consent or knowledge of the owners of the school. Additionally, he sold for cash a car that belonged to the owners, and kept the proceeds. It was not until one of the co-owners requested access to the vehicle that they learned that the car had been sold.

That he remained an associate, consequently serving as a board member of the American Educational Fund, pointed to the level of trust they had in the personnel in a leadership role.

Phase Two: American School Rabat Expansion Planning Sessions and Actions

Data collection activities. The entrepreneur, the expansion team and the researcher engaged in four recorded planning sessions. The purpose of the sessions was to discuss and prioritize challenges, and make plans on how we would address challenges and revise our plans and field activities. Between sessions, we implemented the plans, had small group meetings to reconsider plans or strategies, and then strategized to address new challenges.

Table 10 shows the participants involved in Phase Two, the experience they contributed to the evolution of the school, and the role they played as partners. The prince and the associate of the prince were not members of the expansion team, but were considered partners during Phase Two of the study.

In the expansion of the school to Rabat, Morocco, Phase Two, all the members of the expansion team were employees of the school. Only one person, the American School Rabat business manager, had family ties to Rabat. Her mother owned a pre-school in a beach community called Harhoura, south of Rabat.

A few weeks after the Rabat school was closed by local authorities, the American School Rabat business manager introduced the prince and the prince's business administrator to M. Forciea. The prince was enthusiastic about the school, but did not use his relationship with the royal family of Morocco or the Ministry of Education to influence the school in Rabat or Fez. As previously mentioned, the prince nor the prince's business administrator were part of the expansion team.

Table 10

Key Individuals from Cases in Phase Two

Name	Citizenship	Asset/Experience	Role
Y. El Fethouni	Moroccan	Born and raised in Rabat, site of the expansion school. Fez Economics teacher and graduation coordinator	Business manager and school authorization coordinator for American School Rabat
A. Elyazami	Moroccan	Digital marketing and IT experience for five years	Marketing for Rabat and Fez American schools
A. Gonzalez	American	Teacher trainer of English as a Second Language, NGO director, Fez teacher for 1 year	Principal of Rabat school 2017-2018 and Fez 2018-2019
Moroccan prince	Moroccan	Direct ties to the King of Morocco, university friend of Y. El Fethouni	Potential investor
Business owner of schools in Morocco	Moroccan	Owner of school building in Fez, owner of Canadian school	Potential partner

The idea of expanding the business to either Rabat or Marrakesh surfaced in the fall of 2016. The expansion team was comprised of Fez school and language school employees and was formed in the spring of 2017. I visited Fez for a month that spring to document the scouting process. I was hired as the principal for the Rabat school and began preparations in July 2018. We opened the Rabat school in early September 2017.

The original school was a two-story villa with a swimming pool and a garden surrounding the home. To be able to use a residence as a school building, the school was told that the occupant only needed three out of four neighbors' signatures of approval. After the school began its fall semester, a local competitor paid the fourth neighbor to file a complaint against the school. The fourth neighbor did not live in the home, nor was it occupied. Regardless of that fact, they filed the complaint and the school was closed by the authorities. The owner continued to pay rent, per the lease agreement, for another 3 months, but the school site was not used a school. Classes were held at the residence of one family for 2 weeks in September, then at a business center from October to mid-December while the school administrators searched for a suitable school building. The building selected was formerly a primary school. It was leased in January, but the school had no grass or trees, no kitchen, and very few toilets. Some parents were not satisfied. They continued to send their children to school, but many they paid their tuition late or, in the case of a Spanish family, not at all. The school remained in operation until the end of the school year, in June 2018.

I kept field notes throughout the school year. After I received IRB approval on April 24, 2018, I began interviews to understand the inception stages of the original school in Fez, which constitutes Phase One of this study. After completion of the interviews, the team began meeting in planning sessions from May to July of 2018. These sessions constitute Phase Two of this study.

In August of 2018, I returned to Morocco to continue the authorization work and simultaneously work as the principal of the Fez American School.

I took field notes of conversations, meetings, and incidents from January 2017 to July 2019. Information gathered prior to IRB approval is considered archival information. Subsequent information elicited after IRB approval is considered active accounts of the expansion process during the second year of the study. All recordings, transcripts, journals, and field notes directly contributed to the research goals of this study.

Recordings and transcripts analyzed for Phase Two were produced at the planning sessions held May 29, June 8, June 28, and July 9 of 2018. At the first planning session, on May 29, 2018, I gave a presentation of the cycle of planning and action, and articulated the goals of this part of the study. I clarified that the discussions, decisions, and actions included both schools. The decision was made by the group to focus on the development of both schools because they were directly linked to each other in terms of financial, personnel, and marketing resources.

The expansion team discussed, listed, and prioritized the challenges of the expansion work. It outlined the possible causes of the challenges, and how remedying the challenges would impact the expansion process. Lastly, the team listed strategies to address the challenges and decided which team members would work on which strategies. Over the next 2 weeks, the group implemented the strategies believed to be most effective in addressing the challenges.

On June 8, 2018, the team discussed the status of each school, then evaluated the results of the strategies implemented since May 29. The team drilled deeper into the considerations associated with one strategy, and identified the reasons another strategy was effective in addressing a threat to the original school.

At the third session on June 28, 2018, the expansion team assessed the current situation for the top three challenges identified at the outset of the sessions, discussed considerations of these challenges, and then articulated several options to move towards resolution. Several concerns around the options the team identified were addressed. A new criteria surfaced as one of the options. The discussion helped crystalize the four criteria for decision-making and formation of actions the team would pursue for the following two weeks.

On the last meeting of the 2017-2018 school year for the expansion team, the team recapped the events and critical incidents associated with each of the options. As a result, the last viable option was discussed at length. The discussion focused on how to proceed with the Rabat school, in terms of student education, teacher and staff contracts, and future partnerships.

Planning session 1 on May 29, 2018. In planning session one, after the team made a list of challenges, we used a fishbone chart to examine the causes of the challenges and the possible obstacles. The fishbone chart also forced us to identify the goals of our effort. Later, the team prioritized the greatest challenges, with each person placing a red dot next to the three challenges each person felt needed the most attention in order to reach our goal.

The most critical challenges selected by the group were authorization of our schools, parent loyalty/buy-in, and financial realities caused by the first two challenges.

Session 1 category: Means orientation.

Pragmatic case 4.1.f: American-style education as a commodity. The group privileged American-style education as the most important commodity of the organization. When discussing which school assets were most important to parents and would earn their loyalty, the school's educational philosophy was chosen as the most relevant and attractive feature of the enterprise. The school's philosophy is founded on independent thinking, debate, dialogue, and cooperative learning. One participant said, "We're not just going to just have students sit, memorize, copy from the board because that's not American education."

One expansion team member explained that his brother-in-law, who worked for the Ministry of Education, was chosen to go to the United States, France, and England to study educational systems. He reported that his brother-in-law traveled to large- to medium-sized cities over the course of 2 weeks in each country, and visited many classrooms. The observer said second-grade children were reading on the floor. When he spoke to them, he felt like he was talking to a sixth grader in a Moroccan school. The observer claimed that the students could clearly articulate what they were learning and support their ideas.

A follow-up comment was made that other educational systems did not allow or encourage students to question and ask for further explanations. M. Forciea stated, “The strong point of American education is it’s teaching you how to think, not just how to absorb things … that’s why those students [Moroccan] seem more immature, because they don’t know how to think through a problem. They just know, ‘You tell me what to do, I do it’ or ‘That is correct’.”

Attributes of American education were also noted in comments like “It’s democratic, very egalitarian. If you listen to a lot of people, people are going to have ideas and so everyone wants to raise their hand, everybody wants to share their knowledge.”

Pragmatic case 4.1.g: Learning in an enjoyable way. How teachers teach is a part of the capital owned by the school. One team participant relayed testimony of instructional techniques that centered around the child’s knowledge. He witnessed this type of instructional strategy and shared with the group, “For instance, we’ll be in a first-grade classroom and if the child doesn’t understand something, the teacher would get down and say, ‘how else am I going to explain it?’ and look for different ways until they understand.”

Knowing how to treat children and make learning fun was an example of what teachers knew through their educational courses in American universities. One administrator stated, “We don’t shame the kids and so they try to get them to do it [learn] in an enjoyable way.”

Session 1 category: Entrepreneurship agency.

Episodic 4.2.f: Selecting a Rabat school site. At the outset of Phase Two of the study, in the spring of 2017, the expansion team decided on the location of the school by working with a realtor to see what kinds of buildings were available for a school site. The team took several day trips from Fez to Rabat to assess various locations within the previously selected area of town, Soussi. Soussi is a wealthy neighborhood where most of the foreign embassies are located. The team was comprised of the owner, the Fez School principal, two business managers, the director of the English language program, and the researcher. The process consisted of walking the properties and suggesting what grade-level classes would make sense in each room. We assessed the different uses of outdoor play areas, designated purposes for miscellaneous rooms or spaces, and discussed parent drop-off systems and employee parking. Typically, only the owner and Fez business manager knew the lease cost, if they were told at all. Most owners left that detail for negotiation. It was usually on the drive back to Fez that there was a discussion about the assets of each building and what kind of classes and school it could be. Conversations generated around a pre-school age 3 to Grade 2, or a Grades 1 through 5, depending on the size of rooms and play areas. The possibility of an elementary school surfaced if the rooms were large and there was a large field as part of the property.

On one occasion, the entire group met with one site owner and had tea in her house. Only the owner and the business managers spoke to her about the possibility of the owner helping with obtaining consent from her neighbors for the placement of the school on her property.

Exploring an appropriate site, gathering ideas for best use of the facility and reaching consensus was a group effort. Negotiating the financial matters and assistance with zoning was the purview of the owner and the Arabic and French-speaking business managers.

Pragmatic case 4.2.g: Using social media and lecture series. As the discussion began to center around how to tackle the challenges, team members began deliberating about formulating a message on social media and reinstating the American education lecture series as a method for addressing one of the challenges, lack of parent loyalty. According to Aziz, the IT director:

> We should broadcast what is going on here to the outside. There are a lot of ways now because of the technology… In Fez, I see people, they are addicted to WhatsApp. We can reach a lot more people because we can do stuff with SMS, with WhatsApp, with Facebook. We can grow a lot more. We can reach more people. We can make a buzz about us. People are going to know who we are. Imagine if we had access … we have to own our app with our computer.

A discussion ensued about developing Facebook pages about general education topics that would serve to educate followers about the American School in Fez via posts that the school or loyal parents could post.

In the deliberations about the 22 items needed for the second part of the authorization application, everyone immediately named the links, forms, and printed versions of information they could supply to complete the packet of information needed.

Session 1 category: Building relationships.

Episodic case 4.3.j: Calling in my one favor to the prince. The Rabat school opened on September 4, 2017 and a local competitor reported the American School Rabat location as being out of compliance of neighborhood zoning laws. The school was closed by the local municipal authorities on September 11, 2017. As a means of addressing the authorization problem, the American School Rabat business manager contacted Prince Moulay Driss, a member of the royal family of the Kingdom of Morocco. They had attended the same Moroccan university and were friends. She said, “Everyone knows you can only ever call in one favor and I’m using mine to help the Rabat school.” The prince and his administrator came to tour the school and learned about the history of the family enterprise in Morocco. When he heard about its financial prospects, the prince was convinced that it had great potential. He claimed he wanted to partner in some way, but he did not get involved with the municipal authorities on the closure of the Rabat school.

Over the course of the year, there were occasional phone calls and visits to apprise the prince and his administrator of the status of the school. In the spring of 2018, the connection became critical. The prince's administrator had a meeting with members of the Ministry of Education and then brokered a meeting for the school owner. The prince's administrator reportedly told M. Forciea, "They will talk with you and give you their blessing." What they gave her was a pathway to authorization. This introduction was important because it helped launch a formidable conversation about how the American School with an American curriculum could be authorized within the Moroccan educational system.

The school owner recounted what it was like before working with the partner became part of the evolution of the school:

> This is the way I look at it, before we were able to walk into that meeting with the Ministry of Education and we had no idea who we were going to see, none…. It was completely ambiguous. We had no idea how we were going to move forward. Once that meeting happened, they said, "Here's the list of things you need to get." Now there is a light at the end of the tunnel. You can see one, two, three, four, five. Okay, you can work on this, you can work on that. So, there is a road to getting authorization.

Pragmatic case 4.3.k: Tenant-landlord arrangement becomes a partnership. A second partner surfaced as the team searched and found a new location for the school in Fez in the spring of 2018. The landlord of the building they leased in Fez also owned school buildings in Rabat and buildings in Marrakech. The landlord reported that he was interested in partnering with M. Forciea in the ownership and operation of the Fez school, but she declined. They settled on a tenant-landlord relationship for the Fez location.

In subsequent conversations over the second year of the study, various arrangements for a partnership were entertained in order to re-open a day school in Rabat. At the time of this writing, the two had formed a business partnership in which they would operate an English Language institute in the landlord's buildings in Rabat.

Pragmatic case 4.3.l: Architect for Rabat school. A partnership developed over the 2017-2018 school year as the team sought the expert advice of a certified architect to render drawings acceptable to the Ministry of Education of Morocco. The architect was needed to evaluate the facility requirements of a building that would be utilized as a school, i.e., number of bathrooms, play area square meters, accessibility, traffic flow, and other matters. The building approval was the first step in the authorization process.

The team visited many buildings in Rabat throughout the 2017-2018 school year and in Fez during the latter part of spring 2018 to find adequate school building locations. The architect became the boyfriend of the Rabat business manager.

Session 1 category: Leveraging contingencies

Episodic case 4.4.e: High cost lease forces a move; reverses parent dissatisfaction

In 2012, the co-founder and then-executive business manager negotiated and signed a lease agreement with the owner of a school facility on a prominent street called Trek Immouzer in Fez. This building would house the 200 day students and the 300 English language students who studied in the evenings. The problem came a few years after the co-founder's return to the United States. The monthly rent skyrocketed, per the agreement, from U.S. $14,000 to U.S. $28,000 a month in 4 years. It was impossible to pay, given the budget, and the landlord refused to re-negotiate the agreement amount. The school stopped paying the lease. The landlord sued.

Simultaneously, the competitor in Rabat who had been involved with the closing of the Rabat school had written a disparaging letter in the Fez newspaper about the American School Fez. Many falsehoods were included, but the most damaging claim was true: the school was not authorized by the Moroccan Ministry of Education. Parents began questioning something they already knew to be the case. The American School Fez was and continues to be accredited by AdvancED, an international educational agency, and graduates were being accepted into American, Canadian, European, and Moroccan universities and colleges.

Unrelated to these incidents, the popular debate coach and his wife went to visit the States for spring break. When the debate coach called to report that he had fallen ill and would not be returning, the staff went to check their apartment and found all their belongings had been packed and their keys returned to the landlord. This caused students and parents to suspect that the school was in trouble and rumors began to circulate.

A few other incidents contributed to the chaos. The owner's "suspicious" travel to San Francisco to attend her daughter's university graduation fueled rampant rumors that the school would close. WhatsApp group message, first designed to send information to the school about events, was highjacked by parents to spread damaging rumors. One former PTA parent had meetings with the Rabat competitor and informed parents that they would form another American School in Fez. Many parents stopped paying tuition, including the final one-third installment of the year.

Remaining in the over-priced rental building was no longer an option. The owner and present business manager were forced to look for another building that was large enough for the 200-plus student capacity and with a reasonable monthly fee. After a couple of months of searching, they found a building and they moved in. The new landlord knew the previous landlord and had had dealings with him before. The new landlord said he understood the reason for moving out of the old building.

In the meantime, to avoid legal and financial repercussions, M. Forciea registered the Fez school under a new name while she was in the United States. She registered it under her children's names. It was in this way that the American School Fez was able to continue to enter into a reasonably-priced lease agreement with the new landlord.

Session 1 category: Key constructs of entrepreneurs

Pragmatic case 4.7.h: Now we know how to take a punch. There was camaraderie amongst the expansion team members, and several times they referred to how difficult the events leading up to these sessions had been.

The business manager in Fez recounted the on-going challenges:

> We thought we could take a punch, but we couldn't. Now we know how to take a punch. We've been hit so much, that is amazing that we are still at the table.

The owner echoed these sentiments, commenting:

> I remember when we'd be driving back from the school [in Rabat] …and he'd [the Fez business manager] ask, "how was your day?" Like, how was my day?! Did anyone scream in my face? Anybody try to sue me? Anybody quit the school? Nobody ... Great day!

She added that the odds were stacked against the team and quoted a colleague that 85% of businesses fail in the first year. M. Forciea said, "Let's just be ready, because there's a 15% chance we're going to make it, you know. So why not just keep trying and then do it?"

Pragmatic case 4.7.i: Non-educator in charge of curricula. The person most responsible for gathering curriculum information for authorization was the business manager of the Rabat school, Y. El Fetouni. While she was highly educated, she had only taught secondary school economics and had never overseen the educational program of an American school. Despite these deficits, she exercised her entrepreneurial skills by researching online the academic programs of Moroccan private schools, even once posing as an interested parent to gather information about the number of minutes schools taught various languages and Islamic studies. She interviewed her friends and family about their children's Moroccan school graduation requirements.

The owner, Rabat business manager, and the researcher would review the information she gathered. We assessed what information was not obtained and reflected on how best to proceed with the collection process. She would then go find items needed and translate material into English.

Planning session 2 on June 8, 2018. On June 8, 2018, the team discussed the current status of both schools and evaluated the results of the strategies implemented since May 29. We drilled deeper into the considerations associated with one strategy. We also identified the reasons another strategy was more effective in addressing a threat to the original school.

Session 2 category: Affordable loss

Pragmatic case 4.5.e: Time consuming authorization. The update on authorization processes revealed that it would be a time-consuming process. Documents constituted a file that was submitted and reviewed by a committee of the Ministry of Education, and a receipt was given to the school. It served as proof that the file was under review. There were several cycles in this submission process that clearly showed the procedure would be time-consuming and arduous for the lead and the architectural firm. In the discussion about the time and financial investment of this process, or the level of affordable loss related to this process, the owner appeared committed to do whatever it took to obtain authorization.

Pragmatic case 4.5.f: Settle on small, cost-efficient building. The discussion regarding the school building option was an example of affordable loss. The year of research on the available real estate and the legal requirements associated with each type revealed that: a building that was formerly a school building would be the easiest to get authorized because it met building codes; an office building would be the next possible option because, although construction changes would need to be made to the facility, it would allow for growing enrollment and might be located in high-visibility areas; and a residential building, while less expensive than school or office buildings, required neighbor approval, which was difficult to obtain.

Given that analysis, the owner and team concluded that staying in the current school building was the least amount of work and the most cost-effective. The building was small, but large enough to house the number of students needed to break even. It was also the least amount of work with regard to authorizations and logistics.

Pragmatic 4.5.g: Breaking up U.S. $50k into installments. The obstacle to the option of continuing in the same small building was that the contract signed in January of 2018 stipulated that a one-time payment of the full year's rent would be due on July 1st. M. Forciea suggested that there might be a possibility of re-negotiating with the current landlord to divide the U.S. $50,000 into smaller, equal payments. While the landlord ultimately did not agree to this arrangement, the approach demonstrates an approach to addressing affordable loss.

Session 2 category: Leveraging contingencies

Pragmatic case 4.4.e: Unintended effect of a new building. It is clear from the team discussions about the challenges that the parents were not concerned about the former building and had not voiced any concerns in this regard. Field notes showed that rumors that the school was closing started because parents were fearful of the lack of authorization. They were withdrawing their students and not paying tuition invoices. At the second session, when the team reported on the status of the second top concern of parent buy-in, they declared that the lease of the new building had stopped the rumors. Further, some parents defended the owner and the school to other parents. The Fez leadership team hosted a soft open house of the new building and had one-on-one meetings with some parents. The leadership told parents about the meeting the owner had with the Ministry of Education and this alleviated the primary concerns parents had.

Ms. Olsen, the Fez School principal said,

> But, it's funny because the lack of parental support, I feel like it wasn't … it's like they weren't saying, “We're unhappy with the school facilities.” That wasn't the comment. They weren't saying, “We want a new facility, a better facility,” but then we had these other people undercutting us in such a way that, for some reason, just moving buildings and showing them ... we're not quitting, and not only are we not quitting, but we're going to push forward and keep improving things because this new building is an improvement on our facilities.

The unintended impact of acquiring a new building was re-gaining parent confidence and leadership direction.

Session 2 Category: Co-creating relationships. Entrepreneurs generally take the product to the nearest potential customer so that they might make a commitment to the venture. This co-creation principle dovetails well with the affordable loss principle because obtaining pre-commitments from customers helps reduce uncertainty. This is especially necessary in the early stages of creating a business.

Episodic case 4.3.j: One on one Rabat parent meetings. Final tuition payments were due to the American School Rabat while we were holding planning sessions to explore financial and authorization feasibility. Tuition funds were needed to secure the building lease for the following school year. One parent loyal to the owner advised that we meet with parents to discuss the "promised and not delivered" dynamic that had plagued the school since being forced to move out of the first school site, the villa in Soussi. The "promised and not delivered" narrative came from the dissatisfaction the parents felt regarding the school site. The original school site was a luxury six room villa with a pool and expansive garden. The school site leased in January had no grass or trees, no kitchen, and very few toilets. Parents were not satisfied. They continued to send their children to school, but many they paid their tuition late or, in the case of a few families, not at all.

The owner learned from previous experience that a mob mentality ensued when large groups gather. She said it was best to meet in small groups or individually. As the principal, I held one-on-one parent meetings to provide a school status update and ask parents about their concerns. From these meetings, we learned that they wanted the same teachers and leadership to return next year; the kinds of repairs that they expected to the building; and which families intended to return next year. This last piece of information prompted the team to draft a financial forecast and form an affordable loss scenario.

Planning session 3 on June 28, 2018. This meeting took place in Fez a week after the last day of the school year in Rabat. The lease for the building was to expire at the end of the June, a few days after this meeting. The school furniture, books, and technology equipment were still in the school building and the landlord was expecting the rent sum of U.S. $50,000. This amount would cover the second year lease of the Rabat school, the 2018-2019 school year.

During the third planning session, the expansion team evaluated the current situation for the top three challenges identified in May (authorization, parent buy-in/support, and finances), discussed the issues that framed the current situation, and formulated options to evaluate (Table

11). The team developed three criteria (Table 12) that would help decide which option made the most sense for the expansion effort. Later, a fourth decision-making criteria, image, grew out of the discussion of the homebound program. The team expounded how it applied to the present situation and how it might impact future business growth.

Session 3 category: Co-creating relationships

Episodic case 4.3.l: Impact of waiting for prince for another year. When it was revealed to the expansion team that the prince, the Rabat school partner, wanted to wait to participate until 2019-2020 school year and not the upcoming 2018-2019 school year, there was a shift in scale of expansion. The news caused the team to re-evaluate the expansion process because not having royal support for the fall of 2018 limited the resources available to move forward within the next week. It prompted the team to examine other options. It accelerated the timeframe necessary to realize the options, and placed parents as critical allies in the survival and viability of the enterprise. In other words, the absence of one partner caused the enterprise to re-evaluate its options to stay viable, and also introduced more rigorous affordable loss analysis to stay solvent.

Session 3 category: Socio-cultural embeddedness

Pragmatic case 4.6.f: Image enters the decision-making criteria equation. As the team discussed the possibility of working with the partner who owned a Canadian school in Rabat (Option 3 in Table 11), the fact that he had a large building in a wealthy neighborhood became a contributing factor. The size and location of his building added sizeable weight to the potential role this partnership might have in the future. The perception of wealth or financial stability was a desirable image that emerged as a factor in decision-making.

Table 11 demonstrates the options and considerations of what could be done at the end of the 2018 school year and Table 12 shows the criteria used to weigh the options.

Table 11

Options and Considerations

Options	Explanation	Implication for Partnerships	Implications for students and parents
Option 1	Pause operations for 1 year while we work on authorization. We would end lease agreement, store school furniture, release teachers and staff of their contracts and explain to parents why we could not re-open that year.	Pause partnerships as we work on authorization, possibly recruit them to assist in that process.	Students and parents would have to search for another school for that fall. They would be upset and may lose trust in the enterprise.
Option 2	Stay open in the current building, keep a tight budget by reducing personnel, continue to use landlord's authorization while work on authorization and possibly, re-open in a large building in 2019 with partner support.	Work with current landlord and use his authorization; need to re-negotiate the lump sum required at the beginning of the school year.	Keep educational continuity for students and parents.
Option 3	Explore a "school within a school" concept with new partner who owns and operates a Canadian school and a Moroccan private school in Rabat.	Join a partner that is unknown to the owner and team; terms of contract have not been discussed.	Keep some educational continuity but may cast doubt over delivery of services.
Option 4	Establish a 'home-bound' educational program where no building or authorization is required.	No partners needed, but Fez school authorization when obtained, could be dismantled.	Keep educational connection to American school, but delivery of services is unusual and may not work based on image and mistrust. Would need to run revenue-expenses to inform profit/loss equation.
Option 5	Close completely.	End partnerships.	Students and parents would have to find another school for that fall.

Table 12

Criteria for Weighing Options

Criteria	Option 1 Pause 1 year	Option 2 Current location	Option 3 School within school	Option 4 Homebound	Option 5 Close
Authorization	Continue to seek	Use landlord's authorization	No need	No need	No need
Finances	No expenditures	Dependent on tuition. Would need to enroll 25-35 new students to maintain financial equilibrium.	Dependent on tuition, unknown opportunities. Would need to enroll 25-35 new students to maintain financial equilibrium.	Minimal expenses and revenue	No expenditures
Trust of families	Lose trust	Keep trust	Keep some trust	Keep some trust	Lose trust
Image	Slightly harmed	Stay same	Unknown	Poor image	Poor image

Session 3 category: Affordable loss

Pragmatic case 4.5.h: Losing the trust of Rabat parents vs financial and authorization risk. A. El Yazami, the technology and marketing leader for the expansion team, suggested that if the school kept the same location and there were sufficient funds in enrollment to pay the teachers and the staff, the Rabat school should stay open. When asked his reasoning, he stated that having a major partner was worth waiting for, even for a year. He also thought that keeping the school open even with low enrollment was better than closing and re-opening a year later because, as he said, “we will lose the trust of the parents.”

M. Forciea accepted that there was a risk in losing the parents' trust, but was emphatic that the team only go forward if there was no financial risk and no risk of being shut down due to authorization issues. She reiterated, "If we are solid in protection, in authorization, and if we financially will not lose money, then I think we should do it."

Pragmatic case 4.5.i: Number of students needed in Year 2 in Rabat. As option #2 to keep the small school open gained support, the affordable loss conversation became increasingly detailed. The business managers had different numbers of students required for a break-even scenario, but agreed it was somewhere between 25 and 33 with a partial scholarship. This also assumed no students dropped out over the summer.

Once the team calculated the needed income to keep the school open at its current facility, the formula constituted the financial criteria for acceptable loss and influenced the action going forward.

Session 3 category: Entrepreneurship agency

Pragmatic case 4.2.e: Move quickly on next steps. With options debated and assessed, the path of next steps was clear. The team members worked on tracking and responding to the authorization process by staying in close contact with representatives of the Ministry of Education, re-negotiating the current small school building lease agreement to allow for installment payments as opposed to the existing lump sum stipulation, adjusting the budget to accurately reflect the expenses in Rabat and update the profit and loss projections, and meeting with the second partner and exploring the possible arrangements for a legal association.

Session 3 category: Socio-cultural embeddedness

Pragmatic case 4.6.f: Home schooling as an option won't work. The team discussed the homebound program as an option. This option would allow us to provide educational services to the students in their homes to maintain a connection to our clients. Two of the Moroccans commented that that concept was foreign in their culture. They said,

> I'm not sure that it would work for the Moroccan mindset. The way they pay, they expect to take their kids to school. And plus, if they're over 7 years old, they wouldn't be able to leave them at home. This is illegal not to send your kid to school. So, that would take out first and second grade; and another thing is some parents could come up with rumors or something about us, that we're evangelizing people or something, going to their homes. It becomes the secret thing that we do, and we've been dealing with all these different things in the past that I'm not sure if it would work. This is the mindset of Moroccans.

Another Moroccan team member recalled meeting American students that were home-schooled. He said, "For the Americans, I think it's a normal thing. For Moroccans, they want a school. Maybe we will have one student out of 20 that would want this." They both nodded when one shared his viewpoint about this idea and extended it to how online purchasing works in Morocco:

> Like the Moroccan guy might do this for his kid, [he] would just need to be very Americanized, like [have] lived in the States for 20 years. Different mentality. Moroccans like to touch what he's buying. This is why online things are not working so well in Morocco. Even the way we buy online things. We order it. They bring it to you. We touch it. Then you give them the money. You actually don't buy it from online, really. We actually order the stuff first before we buy it. Most of the stores are like that in Morocco.

The home bound program was nixed. It also led to a broader discussion about the school's image.

Pragmatic case 4.6.g: Negative and positive elements about schools. The owner led a round robin discussion about what was positive about the schools in Rabat and Fez and what was negative about them. The researcher held a similar discussion at a faculty/staff meeting in Rabat a week before this session.

During this self-reflection, the expansion team said that the students felt safe, were happy and enjoyed learning at the Rabat school. The negative comments were listed as high teacherturnover due to instability of enrollment, building physical appearance, and the need for additional transparency for parents. With regard to the Fez school, the expansion team commented that graduates attend good universities and students come from good families. They also said the school had an excellent international debate team, qualified American teachers, international accreditation, and a 14-year history. They listed the negatives as apathetic teachers, undisciplined students, lack of accountability of teacher performance, lack of building security, and an easy curriculum.

Planning session 4 on July 9, 2018. On the last planning session of the 2017-2018 school year, the expansion team recapped the criteria used to evaluate the Rabat school options and the critical actions associated with each option. The options to close permanently or host a homebound program were eliminated. The current landlord did not agree to dividing the U.S. $50,000 into monthly payments throughout the 2018-2019 school year. This was reported by the Rabat business manager, who had been instructed by the school owner to speak on the owner's behalf. As a result, the two viable options remaining—to pause for 1 year and to partner with the Canadian school owner—were discussed at length. Later, we also assessed how we would proceed with the Rabat school in terms of student education, teacher and staff contracts, and future partnerships.

Session 4 category: Key construct of an entrepreneur

Pragmatic case 4.7.c: Taking care of clients with closure imminent. The last option to work in some way with the owner of the Canadian school rose from the owner's concern for clients. Once the team decided that the school would re-open in 2019-2020, M. Forciea brainstormed how to soften the message to the clients. We would return the school deposits for the 2018-2019 school year, store the school furniture, materials and equipment, and not open in the fall of 2019.

M. Forciea proposed a blend of not opening next year, and partnering with the Canadian school owner. She proposed that “we talk to him about taking our students and perhaps some of our teachers for their Canadian school with the understanding it could be a permanent solution and we would have to get new students. I feel like this would ease the pain of us not opening next year.” When pressed about why she thought this was a valid option, M. Forciea responded:

> They [students] don't have to find another school. As we look at not opening until 2019, what I see as the biggest problems are with our clients, our reputation, and letting down our staff; not having jobs for our staff. It doesn't affect us financially, but emotionally affects me now. I feel bad they don't have jobs ... and honestly, it's the same with the students because even if we lose all those students and they hated us, we'll replace them. But I still feel bad. In my mind, I would feel more at peace if they were taken care of, even though it really has little to no effect on us this year.

The topic was debated at length to reach consensus about what type of arrangement would benefit all the actors. At every point, there were strengths and weaknesses with each scenario. Ideas percolated, such as a maintaining a school within a school, or transferring our students to the Canadian school at the same tuition for this year while we work on a longer-term arrangement.

Two arguments surfaced against the softer message. One argument for not turning over our teachers and students to the Canadian school was that we would be breeding our next competitor. The second argument was to consider partnering with the Canadian school owner because we didn't want to make any more enemies.

As we reflected on the status report and assessed what was still possible, the final decision to not re-open in the fall of 2019 was made by the expansion team. Instead, the team decided to obtain full authorization, advertise, and recruit aggressively in the spring of 2019 and plan to re-open with or without partners in the fall of 2019. The school did not open in the fall of 2019.

Session 4 category: Authority as trust

Episodic case 4.10.c: Negotiated lease for her own school. A couple of weeks after the planning session, a teacher from Rabat called to inquire why the Rabat business manager was offering teaching jobs if the team had decided to wait to re-open the Rabat school until 2019-2020. M. Forciea learned that the Rabat business manager had negotiated a lease agreement with the landlord of the American School Rabat school building for herself and she would open a school in the fall of 2019. It is not known if she even attempted to re-negotiate the American school Rabat lease agreement for smaller, equal payments, as she was directed by the owner.

Photos and information on Facebook show that Y. El Fetouni did open a preschool in August of 2019 at the same address as where the American School Rabat had been located from January 2018 to June 2018.

Episodic case 4.10.d: Ransomed school furniture. After the decision was made to re-open the American School Rabat until the fall of 2019, the owner of the school directed the Rabat business manager to store the belongings of the school in Rabat until the fall of 2018 when the staff of the American School Fez could retrieve the items. The Rabat business manager hired an employee of her architect boyfriend to put the American School Rabat furniture in a storage facility. When she was contacted in August before the start of school in Fez, she refused to disclose the storage location or the phone number of the employee who had stored the items. She claimed that the owner owed her summer salary. She would not provide the information regarding the furniture until she was paid. Photos posted on her new school website showed that she was using the books, puzzles, colored shelves, rugs, and other items belonging to the American School Rabat.

The owner argued that no one was paid during the summer and the business manager was, therefore, not owed any money. No one was paid summer salary because the school closed on June 20, 2018 and the last payroll disbursements were made on that day.

It wasn't until early October 2018 that the Fez business manager met the Rabat business manager to exchange a briefcase with 30,000 Moroccan dirhams, the equivalent of U.S. $3,000, in return for the truck full of school furniture.

Session 4 Category: Entrepreneur agency

Pragmatic case 4.2.e: Criteria and options as a means of controlling the outcome. While the team could not shape how the options evolved or the actors responded, the process of assessing options and developing criteria to weigh the options was in itself an effort to control aspects of the environment which were, to a certain degree and at that time, within the team's control.

This process extended to a discussion of the potential partnership arrangement. Not re-opening the Rabat school, working on authorization, and re-opening on our own the following year was an on-going, tacit consideration. The team acknowledged that it would re-open, if and when authorization was secured.

Themes

Process of identifying themes. In the last phase of data analysis, the researcher re-read the entries in each category in Phases One and Two and titled each case so that the reader and researcher could quickly identify the story, and so there was a gist of the meaning assigned to each case. As I read and re-read, I was mindfully immersed in the data and the relationship each case had with other cases. Per Moustakas's (1990) recommendation, I sought to develop a tacit knowing of the cases or data. Moustakas claims that deeper understanding is the foundation of discovery. Understanding each case as a data point, I perceived the connections within them and, simultaneously as a whole experience, a process called indwelling (Moustakas, 2001). Indwelling requires patience and incremental understanding that moves the researcher towards a creative synthesis of the essential qualities and meanings.

Short phrases described the essential meaning or meanings of each case and from that, recurring themes developed. In most instances, two or three themes applied to a case because the story was a multifaceted or a layered representation of a theme. As themes emerged, I returned to the cases and, on occasion, the transcripts, to verify the nuances in the story. The five themes emerged from conducting the indwelling process in the cases in Phase One and Phase Two. Mind maps were helpful in teasing the details and connections between cases. If there were cases that did not fit a theme, they were left unmarked. These cases were considered patches (Stake, 2010) because they were salient stories to be examined intuitively, with common sense, and to follow the discernment pattern. One case in Phase One and eight cases in Phase Two were unmarked and ultimately formed the fifth theme.

The five themes were persisting, managing shifting assets, taking creative and collective action, maneuvering ambiguity, and developing criteria/weighing options.

Persisting. A key finding throughout the cases reported in this study was persistence. In analyzing the cases within all the categories, the characteristic of perseverance emerged for a variety of reasons over time. Throughout the written or recorded data, there was evidence of a firm or obstinate continuance to maintain a course of action in spite of the difficulty or opposition. This was evident in the stories of the life experiences of the entrepreneur, the recollection of the challenges of the first year of the school, and the field experiences during the year-long expansion in Rabat. Tenacity and resolve was a key construct in the incidents that occurred after the closure of the Rabat school and in the challenge to keep the Fez school open in 2018-2019. There was a determination to return to Rabat in 2019 or 2020 evidenced by conversations with partners that continued throughout the school year.

The journals from the early 2000s served as evidence of the commitment to start a school in a developing country. The source of inspiration and planning grew from M. Forciea's religious and spiritual belief system to “share gifts given by God to be shared with our brothers and sisters around the world.”

After the tumultuous start, the owners pledged their continued support by providing personal funds and, with the assistance of volunteers, created a scholarship fund that would ensure the continuation of the school because it was a dream to help others. This pledge to use one’s gift to help others drove the many years of operation, as those phrases were echoed in the discussions of why the Rabat school should remain open the last months before it was closed.

Concern for local Moroccan families impacted by the closing of one or both schools was also a factor in the persistence to maintain the school operation. Loyalty between the actors providing services to the clients was a related factor, as exhibited by the interviews of the Bensellam family and feedback from Rabat families.

The notion of winning for the sake of winning and using one’s intelligence to dominate the opponent entered the discourse in Phase Two. At this point, the co-founder had created a new company to escape the debt of the previous building and included the names of both her children as part-owners. There was talk about knowing how to take a punch” and “not quitting” when things got tough. The fact that the competitor from Rabat wrote inflamed and derogatory letters to the newspaper about the American school and recruited the PTA president to form a new school in Fez caused the American school leadership team to deliberate about the approach they should take. In one session, Steve Jobs was quoted as stating that one should not compare oneself to the competition; you simply do a better job and let the product speak for itself. In a conversation, Michelle Obama's mantra "when they go low, you go high" was repeated as a response to harsh comments made by critics of the school.

Managing shifting assets. The nature of an international school was associated with the notion of complexity. This concept and loosely linked systems, and how they related to this and other themes, are explored more deeply in Chapter 5. This theme is derived from the idea that assets, such as funds, facilities, personnel, partners such as clients or business allies, and other resources change over time. These assets, whether human or financial capital, varied over the years and impacted the decisions made and taken by the owners and the expansion team.

Who the owners knew and what was on hand in 2004 were primarily American resources. By the expansion period, almost 15 years later, the resources were equally Moroccan and American.

Aside from the nationalistic composition of the assets of the business, the by-virtue-of-being-American advantage shifted from the individual identity asset of the Hasbrouck-Forciea family to an organizational identity asset of teaching American-style education, a collective identity captured in discussions throughout the sessions and actions in Phase Two.

From the category on physicality and creating co-partnerships, there was evidence for using the person that would most advance the school because of what they represented. A blonde American versus a Moroccan-looking American might have an appropriate capital in certain situations. When local cache was needed, Moroccan dads or Moroccan employees stepped in to negotiate deals. As the number, experience, and education of American teachers shifted from year to year, the courses and, sometimes, quality of the courses changed. Unlike in the United States, where one can replace an unqualified teacher easily, the availability of trained, native-English speaking teachers can be a challenge. Who does what, when, and why shifted often and framed the business climate.

Taking creative and collective action. This theme connoted activity and included two complementary descriptors: creative and collaborative. As the stories within the categories were examined, most actions taken in both phases reflected a synergy of various forces. Many of the same stories required the collective to puzzle together an analysis of what needed to be done to respond to a crisis or unknown or unpredictable phenomenon. Taking creative and collective action was a theme heavily generated by stories from the leveraging contingencies and co-creating partnerships category, although not exclusively.

The decision made by the co-founders to start a school in Morocco began as a collective action as evidenced by the prayer groups that formed to support the family. Prayer was an action. Prayer groups and meetings about how to carry out this mission were also actions that included Christian people from the United States.

When the family arrived in Morocco, they admitted to not knowing, and having to learn, what needed to be done to open a school. With a small cadre of Moroccans, the Loualis, and the accountant, they worked together in an impromptu manner (“do something, anything!”) to construct and lease a building, register the business, recruit American and French teachers, and start conducting classes within 5 months of their arrival.

As the school grew, the co-founders, school administrators, and parents agreed to use their positions, expertise, and cultural capital in approaching and addressing questions as they arose. Bartering for a reduction in school tuition was problematic for the co-founder when approached by an individual parent, so it became a collective decision. The bartering for services and school supplies, and negotiating the price for a new building, was acceptable when conducted by a Moroccan employee and less desirable when conducted by an American. This manner of deciding which person should address which issue was an example of creative and collective problem-solving.

The cases from the category leveraging contingencies, such as agreeing to a meeting with a select group of Moroccan fathers after the couple had fled to Chefchouen, refusing to pay a lease with exorbitant rent by forming a new company, and regaining parental support when a new building was leased were examples of creative solutions. The last two situation were devised by a group of people sitting around a table brainstorming what could be done quickly to address a crisis.

In Phase Two of the study, the expansion team agreed to meet every 2 weeks and discuss, plan, and take action as a collective. A group equally composed of Americans and Moroccans and led by M. Forciea followed a fluid process of problem-solving. Agendas were developed at the start of the meeting based on pressing issues and items were prioritized in order of importance. Initially, some exercises were used to crystalize most critical problems and brainstorm possible solutions. Decisions were made by the team. Actions being considered or taken between the sessions were deliberated in small group calls or phone conferences.

These sessions resulted in actions being taken by the team member best equipped to lead an investigation into an issue, complete a task, or negotiate an arrangement. In discussions, reasoning about cultural differences and uniqueness played a role, as did gender and expertise.

Maneuvering ambiguity. This theme emerged from various cases, across a majority of categories. Maneuvering ambiguity can be described as a constant awareness of, planning for, and reaction to the nature of uncertainty in the operation of the schools. The theme emerged from cases in which the unknown needed to be known and, oftentimes, acted upon. It was highly associated with the theme of persistence in the data.

The cases described three types of actions associated with managing the opacity of the situations: When you don't know; When you know, but need to act as if you don't know; and When you "know a guy."

When you don't know, such as before the co-founders moved to Morocco, there was a reliance on God or Faith in God, as evidenced by the group and individual prayers reflected in the personal journals, and on sharing an intent to build a school with their professional and personal network.

After the couple arrived and approached their project in real time, they asked local contacts and developed professional relationships as a method for learning what they didn't know, such as registering the business as a SARL. After the theft of tuition funds and the firing of the first school director, the parents of the students who pledged loyalty became their network for addressing situations or processes they and the principal didn't know.

A second type of maneuver/situation-knowing reflected in the cases was when an incident occurred and the entrepreneur was aware of the situation and chose to address the situation within the confines of the school-based authority boundaries. There were a variety of reasons why the entrepreneur did not pursue an aggressive solution, but the ultimate rationale was that it woudl avoid harm to the business or benefit the business to do less than more.

Examples lay in the four counts of theft revealed in the cases. After the Moroccan school director allegedly stole U.S. $35,000 and the Rabat business manager kept furniture that was the property of the American school, the owners did not press charges. The principal personally benefitted from a business loan. In late spring 2019, the language school secretary allegedly stole almost U.S. $20,000 in tuition and book remittances. The school owners addressed the thefts by firing the employee in three cases, absorbing the loan as part of the compensation package, or paying the staff person to release the property. The owners did not pursue legal action. In these cases, the owners claimed was advantageous to the business to avoid public conflict.

Another example of “act like you don’t know” is the response of the principal, who disregarded former teachers who demanded a severance pay or they would file lawsuits. Since the principal did not know the teachers or the employment conditions, he could accurately say he did not know.

In the second year of the American School Fez, the financial forecast demonstrated that an enrollment of 50 students would allow the school to break even. The principal, E. Lozano, and M. Forciea did not reveal the enrollment numbers to J. Hasbrouck, to buy time to come up with solution. They acted like they didn’t know until they could find a solution or increase enrollment. Ultimately, the solution was to form a 501(c)3 and collect donations for scholarships for students attending the school. This fund subsidized the school operation when enrollment was low.

When young teachers told the owners that they didn’t know what they were doing and did not plan very well, the owners replied that they were trying their best and were invested for the long term in Morocco. They stated that they would work to “figure it out.”

The third type of maneuver/situation is what we jokingly dubbed “I know a guy.” Oftentimes, when an American needs something like a car rental or dress made and tells this to a

Moroccan, they always know someone, or know someone who knows someone, who can get the job done. The “guy” was initially the Moroccan secretary who collected on outstanding tuition or found a plumber to fix the bathroom at a reasonable rate. The fathers who met with realtors when the school was seeking a new building to lease were the “guys” who would not allow the English-speaking principal to negotiate with local Moroccans, lest he get taken advantage of.

In the years before the school was founded and in the first years of the school, American church members and international teaching organizations were “the guys,” because the co-founders received advice from them.

Weighing options and developing criteria. This theme emerged from analyzing different cases in several categories and, in most instances, the actions of weighing options and developing criteria occurred in that order. This process transpired in circumstances where an issue or situation arose and the co-owners or expansion team needed to move forward (i.e., do something beneficial). Examining the options or possibilities was the first step during a meeting or on a drive to and from Fez and Rabat. Sometimes the action was inaction or retreating from the problem at hand. When a list of ideas had been discussed, then the goal or objective would be held up to screen the ideas. Later, we made a decision about which option or options would be acted upon. In Phase Two, there was deeper articulation of our goals and objectives because we were using a loose version of the action research cycle. When criteria were articulated, the options were prioritized and actions pursued accordingly.

During Phase Two of the study, the expansion team began meeting regularly in the spring of 2017 to discuss, plan, and implement various facets of opening a new campus in the capital of Morocco. The availability of suitable properties was a de facto weighing of options available. This was possible because several properties in the preferred area were available. The criteria for selection were not necessarily articulated, but suitability was discussed after each site visit. In the discussions, it was noted that elements of the school operations were subject to the configuration of each property, such as a lack or presence of parking, number of classrooms, the size of the play area, and security features. It was usually on the ride back to Fez that criteria developed and prioritized, based on the features of each sites. There were informal rankings. These rankings determined the grade levels and type of school (pre-school to elementary, or solely elementary) that would be established.

In the latter part of 2018, after a school year with numerous setbacks, the team adopted a process to brainstorm options, then develop relevant criteria based on the goal and, later, if needed, prioritize the options. This process grew out of the need to get status reports on each of the school locations. By learning about the present situation, options were explored based on what was possible. The criteria were then developed to ensure that we were working towards the group-defined goal. In most meetings, individuals volunteered or were assigned certain tasks and this sometimes forced us to prioritize the options. The sessions and notes detail the logic of that process. Table 12 shows the criteria considered for the Rabat school in June and July of 2019.

Summary of Chapter 4: Data Collection, Analysis, and Findings

This case study met the goal to explore the entrepreneur and the expansion team’s cognitive strategies, and entrepreneurial actions, within a socio-cultural context in the creation of knowledge. To accomplish this, the data collection system included recorded interviews and team meeting sessions, informal conversational interviews, field notes, and review of archival records, personal journals, research journals, and analytic memos.

These data sources were gleaned for deeper connectedness through a narrative analysis design to form the ten categories in the two combined phases of this study. The categories were examined using a heuristic method to form the five themes: persisting and persevering, managing shifting assets, taking creative and collaborative action, maneuvering ambiguity, and weighing options/developing criteria. These themes represented a holistic view of what was learned from this 2 year case study.

In the next chapter, the themes will be woven to the theoretical framework and current research literature of innovation entrepreneurship, social embeddedness of entrepreneurship, and the five principles of effectuation. The purpose of the next chapter is to bridge what decision-making strategies were most prevalent over the course of the 15 years and how they contributed to the evolution of this venture. As a result of the findings, we explore a design model that incorporates the strategies, processes, and considerations within the context of two different cultural environments. It is also important to reflect on the difference in heuristics in the creation and expansion stages of the business.

The findings are not generalizable due to the nature of qualitative research (Merriam, 2009), although the overall case study with a narrative analysis design serves as a manifestation of perceptions, meanings, and understandings produced by the participants and researcher under this particular context (Lichtman, 2013). The findings of this instrumental case study also inform the framework for entrepreneurs proposed in Chapter 5.

Chapter 5: Synthesis and Recommendations

Epistemology of the Study

This study is based on a critical element of the social constructivist knowledge claim (Creswell, 2013), which holds that individuals seek to understand the world in which they live and work. Socrates advocated that teachers and learners should talk with each other to interpret and construct the hidden knowledge and meanings by asking questions (Noddings, 2016). Piaget's (1977) constructivist views of human development and learning posits that learning does not occur passively; it occurs actively through the construction of meaning in our experiences. As learners, when we encounter an experience or a situation that questions how we think, we enter a state of disequilibrium. To restore equilibrium or balance, we must change how we think and, therefore, assimilate our understanding.

This study is grounded in the social application of this view. Social constructivism (Kim, 2001; Roth, 2000; Vygotsky, 1978) is a theory of knowledge in sociology and communication theory that examines the knowledge and understandings of life that humans develop communally. The assumption is that understanding and meaning are created in relationship with other people. Relatedly, social construction in qualitative research (Berger & Luckmann, 1967; Lincoln et al., 2011) privileges the multiple understandings and contributions of participants.

The participants and researcher experience learnings that are subjective meanings. Meaning is socially, culturally, and historically negotiated and represented in qualitative research. Lather and St. Pierre (2013) argue that post-structural research strives to make the researcher's and the participants' subjectivity clear and visible.

Social constructivist research (Creswell & Creswell, 2017) is an interactive and iterative process between the participants, the researcher, and the thing to be studied and places a heavy reliance on what the participants said and did, the meaning assigned to what was said and done, and the specific contexts in which things were said and happened. This process compels the researcher to seek out and stress the complexity of views rather than narrowing meanings into a few categories or ideas (Flick, 2018).

To be able to make the researcher's and participants' subjectivity clear and visible while simultaneously capturing the central theme being studied, this researcher used narrative analysis as method because it utilizes storytelling as a way of communicating the researchers' and participants' realities (Clandinin, 2006). By presenting stories as the primary format in the presentation of findings, the reader gains a deeper understanding of the material and the researcher's insight. Cortazzi (2014) tells us that by including these insights and story details, the reader is able to access real people in real settings through the painting of their stories.

The narrative analysis method was appropriate for this study because it complements a constructivist approach and a psychological approach (Esin et al., 2014; Smith, 2015). These approaches utilize the story as the analytical unit. By selecting a story as the unit of analysis by which data is interpreted, we encapsulate the different levels of context, from the mini-processes of cognition of the theory of effectuation to the broader socio-cultural and historical context that frame the participant-generated stories.

Articulating the relevant epistemology of this research study is a necessary foreword to this chapter because it embodies the layered, complicated, and convergent/divergent heuristics of entrepreneurial thinking and action documented in this study.

The Study

The inquiry grew from a curiosity about how an American family from the Midwestern United States came to establish a private American-curriculum school in a predominantly

Muslim country in North Africa, and how, almost 15 years later, it came to expand to the capital city of that country. The researcher had a relationship as a former teacher and curriculum consultant with the co-founders, and shared her curiosity with the entrepreneurs, with the intention of exploring how principles of entrepreneurial cognition and behavior manifested during the venture establishment and expansion. Together, we outlined a study that would cover the entirety of the life of the school.

Phase One of the study covers 2001, a few years before the co-founders moved to Morocco up to 2016. There was a direct emphasis on collecting information from 2001, a few years before the entrepreneurs moved to Fez, Morocco and the critical first years of the school's existence. Phase Two of the study focused on the time frame from the spring of 2017 to the summer of 2019. This includes the planning and site visits for the expansion school, the school year it was operational, and the year and a half after it closed.

The purpose of the case study was to explore the entrepreneurial thinking and enactment of the entrepreneurs from various sources. The initial data sources were written records, including personal journals dating from January 2004 to 2006, drafts of a book about the family and their efforts, and the business plan produced in the spring of 2004. After IRB approval was granted, semi-structured and informal conversational interviews were recorded with co-founders and with several stakeholders regarding their personal histories and experiences before and after the move to Morocco in May 2004 and the first years of operation. This constituted Phase One of the study.

Phase Two of the study consisted of recorded expansion team planning and implementation meetings, archival research journals, and field notes of events in Fez and Rabat belonging to the researcher dating from March 2017 to July 2019, and field/research journals of a few team members from May 2018 to June 2019.

Transcriptions and printed sources were analyzed using free textual notations (Smith, 2015), followed by first impression eclectic coding (Saldaña, 2015). Based on the connections between the cases, the stories with a common content became categories using three frames of data analysis and their respective methods: Merriam and Tisdell's (2015) steps of analysis, Stake’s (2005) phases of data analysis, and Moustakas’ (1990) outline guide for procedures of data analysis. As a method for discriminating between the type of story, the stories are deemed episodic or pragmatic cases. Throughout the iterations of analysis, and most profusely in the last round of data analysis, analytic memos were maintained (Stake, 1995; Maxwell, 2013; Moustakas, 2001) and gave insight to the holistic data analysis process. The data analysis yielded 10 categories and five themes: persistence, shifting assets, maneuvering ambiguity, creative and collective action, and weighing options/developing criteria.

Research Questions

The data analysis yielded 10 categories and five themes that address the research questions, which are:

A. Did the entrepreneur(s) use the five principles of effectuation theory in the creation of a firm in a foreign country? Were other cognitive processes and strategies utilized? If so, how?

B. How did these cognitive processes, strategies, and interactions contribute to or hinder the creation of a business venture in a developing country?

C. What entrepreneurial processes and strategies were employed by the owner/directors and expansion team in their effort to expand the business to a second site in Rabat,

> Morocco? How can the entrepreneur and expansion team utilize these processes and strategies to build local, contextual knowledge for optimum implementation of future schools?

The research questions serve as the scaffolding for the findings, theory, and current research for the bulk of Chapter 5.

To answer research question A, effectuation theory was intuitively used by the school founders in Phase One of this study. To answer research question two, the study identified the applicability (both pro and con) of the theory components during Phase One. In response to research question three, as an action researcher, the researcher deliberately guided the expansion team in Phase Two by employing principles of effectuation theory, discovering deeper insights into the business through its application.

The last research question was a practical meta-cognitive question for the expansion team: How can the entrepreneur and expansion team utilize these processes and strategies to build local, contextual knowledge for optimum implementation of future schools? This final question is addressed by the section, "Design Model for Entrepreneurs in Two Stages of Development" further on in this chapter.

Synthesis of Themes, Theories and Implications via Design Model

The flow chart in Figure 4 depicts the flow of the study results. It shows how the data collected from Phases One and Two formed the 10 categories described at the outset of Chapter 4: Findings. These categories were distilled into five broad themes that are woven into the current landscape of the theoretical framework of effectuation theory, constructs of entrepreneurship, and social embeddedness of entrepreneurship.

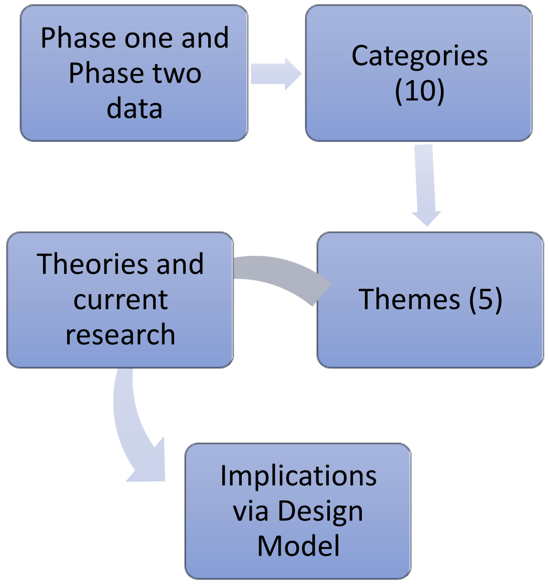

Figure 4. Flow chart of study results.

Persisting. According to Merriam Webster (2020), persistence derives from the intransitive verb persist and it means "to go on resolutely or stubbornly in spite of opposition, importunity, or warning," while resilience is "an ability to recover from or adjust easily to misfortune or change." The concepts reflect the findings of the study in that the co-founders, then the expansion team, exercised their collective agency to move forward with establishing and expanding the business. Resilience is applicable given the many challenges the organization faced over the years. Resilience is an element that helps entrepreneurs to apprehend uncertainty, to adapt to negative circumstances, and to overcome problems. Resilience or the ability to start again after adversity has been developed in the entrepreneurship literature to understand serial entrepreneurs creating companies after failure (Bullough, Renko, & Myatt 2014). While persistence denotes a forging through or a movement forward despite challenges, resilience specifically denotes change or recovery from a challenge.

The notion of persistence is directly related to means orientation as it answers the question, Who am I? It does not necessarily ask, What do I know? What can I do? or Who do I know? Persistence taps into a deeper meaning and asks, What am I made of? In this way, persistence relates to entrepreneurship agency, calling upon an emotional, spiritual self. It also relates to agency because persistence is necessary when taking actions. Entrepreneur agency is the movement of the self, with all they are, to seize external opportunities without economic prediction models to guide them.

Resilience is more directly tied to the concept of leveraging contingencies when the entrepreneur manipulates unpredictable events into a benefit, and when uncertainty is almost guaranteed. Resilience also begs the question, What am I made of? because it calls into question the ability to bounce back after a financial disruption and emotional pain, like a theft by your best friend.

Chapter 4: Findings is riddled with stories of both persistence and resilience throughout the interviews, field notes, and research journals. There are stories after stories of heroic actions exhibited or taken by the co-founders, administrative leaders, and the expansion team when initiating and nurturing entrepreneurial activity and after facing difficult personal and professional challenges.

Persistence is described by M. Forciea as a personal attribute gained from her childhood experience as the young sister of two older brothers and, later, as a result of a mysterious exorcism of sorts, the episodic case of the assault in Hungary.

Tolerating physical pain and abstaining from crying as a result of that pain was a sign of physical strength and resolve. M. Forciea endured not only the pain her brothers inflicted on her, but that of their friends, complete strangers, and boys older than her. She referred to that personal resolve a second time when she was challenged by disrespectful middle school students, and a third time, when confronting Moroccan men who tried to intimidate her at meetings or on the street. She points to the valor she developed at a tender age as the characteristic that served her when facing personal and professional challenges with the business and with people she trusted.

This ability to endure and obstinately go forward is part of her identity because she claims to have no fear. The case of the assault illustrates the removal of fear in the entrepreneur's life at a young adult age of about 23 or 24 years old. Whether the reader believes that all fear can be removed with a minute-long prayer is irrelevant. The speaker attributed the event of prayer as the sole reason for not being afraid. This belief was not temporal; it did not apply only to the days after the attack, but instead continued through the present and has had implications for how she perceived threats or fear in her life.

Through this story, M. Forciea tells us that the person who removed her fear after the attack prayed to God. She also prayed to God when she was being attacked. Her faith in a higher being is the source of her protection. Faith in God plays a role in this transformative incident. Prayer instantly changed her perception of the world and even elevated her physicality. She reported feeling lighter and realized that she no longer felt suffocated. She also reported that the prayer by the stranger removed incessant nightmares in which her fingers were severed. She played her guitar at church and that brought her a great deal of joy. In her nightmares, having her fingers cut off represented being severed from the joy she associated with music and singing.

The source of M. Forciea's persistence is rooted in her faith in God and this is evident in the years prior to moving to Morocco and the initial years. In her journal, she pleaded to God to make her a Godly person, more in His image of patience. She asked for Him to bestow virtues of tolerance and kindness. In late 2003 and early 2004, entries were more focused on the development of the school and American recruits. She named people and asked God to move them and others, Christians and Muslims alike, to use their gifts to serve God in Morocco.

Research findings posit the idea that entrepreneurship is driven by a person's values (Bolzani & Der Foo, 2018; Morris & Schindehutte, 2005), such as achievement, power, self-direction, benevolence, and security. There are also internal values, such as faith (Busenitz & Lichtenstein, 2019; Kinjerski & Skrypnek, 2004), which are spiritual resources. Values are personal, individualistic in nature, and intangible mindsets and meanings associated with people and business (Greenway, Phelan, Turnbull, & Milne, 2007), and transcendent because the resources are associated with something beyond self and natural experience (Piedmont & Wilkins, 2005).

In more recent years, the term spiritual capital has emerged and has been associated as both a collective power in society and its economic activity, as well as a characteristic of individuals and their respective economic activity (Berger & Redding, 2011). Berger and Redding (2011) define spiritual capital as "a set of resources stemming from religion and available for use in economic and political development" (p. 2).

Further studies by Neubert, Bradley, Ardianti, and Simiyu (2017) define spiritual capital as "the set of personal, intangible, and transcendent resources that emanate from an individual's spiritual or religious beliefs and experiences and may be used in economic activity" (p. 622). It is this notion of spiritual capital that serves as the source of M. Forciea's courage to persist and be resilient. It is an expression of who she is and why she confidently expresses her entrepreneurial agency, two principles of effectuation theory.

The notion of persistence and resilience, evident during the critical start-up stage of the venture, is related to the effectuation theory principle of means orientation. While neither co-founder had the experience of starting or owning their own business or living in a predominantly Muslim country, their combined knowledge and resourcefulness around classroom and business management was a critical feature in their persistence during the months after arriving in Fez and before opening the school in Fez. They utilized their resourcefulness and "do something, anything" approach to build the foundation of the business. Research suggests that one's view of the future is enacted and developed over the course of a career (Engel et al., 2014). As a teacher and business manager, the entrepreneurs were shaped by key mechanisms in their work. J. Hasbrouck worked for a corporation that relied more heavily on casual decision-making, while M. Forciea worked as a classroom teacher where she orchestrated instruction. As the leader in the microcosm of her classroom, she relied on effectual decision-making. Engel et al. (2014) extended effectuation theory, reformulating one of its most dominant assumptions by showing that the foundation of experiences contributes to the development of effectual thinking. Past career experiences play a much wider role than what is experienced within the entrepreneurship context. Rituals, events, routine tasks, regulations, actions, and decisions prior to entry to entrepreneurship are important contributors to entrepreneurial behaviors.

A second aspect of the means orientation principle is linked to the reasons why the couple launched a school in Morocco and persisted after the difficult problems they faced in the first year. They explained that they wanted to contribute to the well-being and advancement of a community. M. Forciea wanted to use her position as a college-educated American who spoke English well to make a difference. She said, "I have an education and I know how to educate people. My only goal is, I want to feel like I'm making a difference in the world." J. Hasbrouck echoed her sentiment:

> I think that was kind of a real important time in our lives to think that we wanted to do something overseas. We …. were very intentional to have something that was going to be integral to the community and that would serve the community, and it became quite clear that starting a school would have a huge impact on the community and the society as a whole.

Emerging streams of effectuation research consistently find that entrepreneurs create firms as artifacts to fulfill their generalized aspirations, by exploiting all means on hand and dynamically adjusting their goals (Read et al., 2016). Entrepreneurs will cope with the uncertainty and limited resources based on the means orientation of "Who I am, What I know, and Who I know," as they pursue their creative aspirations. This is true of the co-founders who had altruistic aspirations for establishing the school. They used what they knew and who they were, as professional educators and managers, to build a venture.

In research related to why people start businesses and persist in their effort, Liu (2019) found three types of aspirations. Entrepreneurial aspirations are defined as "the vision that drives people to undertake entrepreneurial action from the start while continuously pursuing it within the entrepreneurial process" (p. 981). The identified categories of original aspirations when starting a business are social-centric, commercial-centric, and autonomy-centric. The social-centric category is an aspiration that focuses on making the human and environment better. Commercial-centric is an aspiration focused on optimizing profit, while autonomy-centric is an aspiration based on the independence sought by the entrepreneur as the reason why the entrepreneur initiated a business. A critical finding in the research (Liu, 2019) is that evidence suggests that social-centric entrepreneurs have a high tendency to engage with effectuation logic, while commercial-centric entrepreneurs tend to use more causal logic.

The founders of the school in this study who intended to advance the country of Morocco are social-centric entrepreneurs, because their beliefs are consistent with the idea that they "consider their firm to be an agent that acts in an empathetic manner in order to increase the wellbeing of others" (Liu, 2019, p. 1000).

The goal of improving society is difficult to measure and calculate one's success. Given the ambiguity of the social-centric goal, these types of entrepreneurs focus on doing what they are capable of doing, all the while monitoring and adjusting short-term goals based on outcomes and feedback from others. This decision-making practice reflects the decision-making practices of the co-founders and falls squarely on a means-driven mindset of effectual thinking.

Shifting Assets. In this theme, assets can be human capital, cultural capital, or financial capital, and they can be individual or collective resources. In this study, the researcher defines assets as inherent resources possessed by the entrepreneurs, or at their group disposal for use to grow the business. The fluctuation in the inventory of assets between the initial start-up period and the expansion phase is notable and explored here in light of effectuation theory principles, such as means orientation and strategic partnering.

In the Chapter 4 narrative, "Pragmatic case 4.1.c: By virtue of being American," M. Forciea ties her identity development while in Hungary to her desire to educate, specifically to form a school. She merged who she was (is) with what she had, to form a hybrid of human-cultural capital. This personal insight constitutes the initial identification of an asset. This asset becomes currency that is used in several entrepreneurial actions, beginning with the dream to establish a school in a developing country.

This asset is linked to an asset about physicality, or in terms of, Who I am, in means orientation. On various occasions, M. Forciea talks about her fascination with people with dark hair in her Midwest town in Minnesota and with a fellow high school student from Germany. In the Midwest, she looked like almost everyone and she valued the unique feature of the persons different from her, like language, home life, or national origin. Pragmatic cases in the data explored the topic of physicality and how it was used as an asset by the co-founders to position themselves as different and unique from those around them in Morocco and, therefore, uniquely equipped to establish an American school. In this instance, the co-founders capitalized on the features once seen as ordinary in their home country and transformed them into unique and valuable commodities in a foreign country.

This positionality is expressed as an aspect of the effectuation theory principle called means orientation that focuses on "Who I am." In this case, the nature of identification of who the entrepreneur is includes an awareness and utility of their unique physical features, fluency of English as a foreign language, and international educational experience. These provide an entrepreneurial and market advantage. The educational level of the co-founders complements their expertise and serves as an additional asset. In looking at the antecedents of entrepreneurial self-efficacy, Kasouf, Morrish, and Miles. (2015) state that an entrepreneur's experience exists in the form of human and social capital. This human capital could be formal education, such as a university degree, or informal education, like start-up experience. Physique, language proficiency, and international experience are the co-founders' human capital.

A second set of assets that changed over time were the administrators, faculty, staff, and supporters. Those people were invaluable resources to the school's operation and by default formed the entrepreneurs' social network. Kasouf et al. (2015) define social capital as social networks, like professional affiliations, and/or relational capital, such in information generated by the entrepreneur. During the initial phase of the business, the primary partners were one Moroccan family, several families in America who made tangible and monetary contributions, a few spiritual guides who consulted with the founders, and one American who had resided in Fez for several years before the Hasbrouck-Forciea family arrived. Almost 15 years later, the social network had grown significantly to include founding families like the Bouzubas, El Harti, and others; the long-time employees and their extended Moroccan families; American teachers and school administrators; local business owners; and a member of the Moroccan royal family. The widening of the social circle altered the entrepreneurs' reach and, with it, influence and impact. This notion that the nature and impact of the venture is changed by its partners is echoed by findings of an ethnography by Murdock and Varnes (2018), in which they demonstrate that "entrepreneurial project undertaken by the entrepreneurial network changes as new humans or non-humans become part of it" (p. 256). They extend their finding to include networks of the entrepreneur and the entrepreneurial project, adding: "This interactionism shows that what sparks interest or attracts resources to a business idea is not simply an influx of additional resources but is simultaneously a dynamic definition of the entrepreneurial endeavor" (p. 257).

Research on human and social capital of entrepreneurs (Estrin, Mickiewicz, & Stephan, 2016; Kasouf et al., 2015) suggest that the impact of human and social capital is moderated by entrepreneurs' expressive style, a psychological attribute responsible for the interpretation and perception of their capabilities.

According to the findings, a subtle shift in assets were the kinds of people that the entrepreneur began to recruit. While at first, it might have been anyone who didn't laugh when she told them she was starting a school in Fez, Morocco, it extended to teachers who had college degrees and had been trained in cross-cultural studies and English as a second language, to dreamers/risk-takers with strong flexibility. M. Forciea's Skype interview questions were employed to learn about the people's experience and how they handled uncomfortable or challenging situations. Like the angel investors who chose entrepreneurial experience (Taggar et al., 2019), the co-founder/school director and leadership team sought to hire persons who had the ability to accept change easily and had various work experiences that gave them an appreciation for other people's life ways. This analysis about the relationship between self-efficacy in the entrepreneur and the persons that join the faculty and staff echoes findings reported by Pihie and Bagheri (2013). They found a positive relationship between self-efficacy and the probability of becoming an entrepreneur. Two elements in self-efficacy specifically identified were risk-taking and innovation. These two elements differentiated the venture starters from the non-starters. The entrepreneurs identified self-efficacy in others and invited them to be part of the team.

Maneuvering Ambiguity. Maneuvering ambiguity can be described in this study as a constant awareness of, planning for, and reaction to the nature of uncertainty in the operation of the schools. The theme emerges from cases in which the unknown needs to be known and, oftentimes, acted upon. It is highly associated with the theme of persistence in the data.

The cases in the Findings chapter provide examples of three types of actions associated with managing the opacity of the situations: When you don't know; When you know, but need to act as if you don't know; and When you "know a guy."

Prior to moving to Morocco, there were many unknowns. The co-founders did not know where the family of four would live and they had not yet leased a school building. They were not sure who would be teaching classes or what grades they might need to teach, because they had not enrolled students. Given the lack of clarity in the steps to be taken, the journals produced by M. Forciea demonstrated a heavy reliance on their faith in God and a trust that the Moroccans with whom they were working would complete the required tasks.

While current research has shown that non-financial aspirations may also drive many entrepreneur's decisions, research has not yet adequately investigated whether and how these non-financial aspirations influence entrepreneurial decision-making (Shepherd & Patzelt, 2017).

The business plan articulated what the entrepreneurs knew they didn't know. Given their lack of international business expertise and language proficiency in Arabic and French, the co-founders had to trust in their knowledge and experience in business management and educational management (Who they were). They also placed trust in the Moroccan family they knew and later the American principal (Who they knew) and the Moroccans and Americans they would recruit (future partnerships), as the primary methods of handling the unknowns in their personal lives as well as their business project. In a sense, they were planning for the unknowable by building on their current human assets, forming local partners and conducting outreach for future partners (social assets).

Sethna, Jones, & Harrigan. (2013) claims that entrepreneurial experiences create human/social capital and may explicitly include learning (formal and informal education), work and volunteer activities, family background, social networks, and other pursuits. These experiences, like the guitar school or managing a tech division of a company, may impact prospective nascent entrepreneur's desire and capability to establish a business.

The pre-launch period was a concentrated time of maneuvering ambiguity. One of the co-founders declared that the short time launch was a stressful aspect of establishing the business and a critical factor in less-than-optimum business decisions, but also argued that the sense of urgency collapsed the intensity of critical implementation tasks into a short time frame. This hurried process had the unintended benefit of advancing the entrepreneur's knowledge and forcing partnerships. He claimed it was also helpful because they "didn't have the luxury of time to overthink things." When challenged that the open date was unreasonable, he countered that missing it was not an option because, according to him, "if you miss the fall, you might as well not open."

He also actively engaged with the implementation process, saying he wasn't going to wait for something to happen or that there were never days that he wasn't doing something, like jumping into the car to do "whatever." He was aggressively engaged, at times saying, "I would just force my way" or demand that team members stay on top of developments.

Professional services were executed by the entrepreneurs with swift action and without much deliberation. The rapid decision-making served to advance the start of the school. When the second building was unavailable, they entered into a lease agreement on a building that was not completed or secure from the elements or the public.

In short, this strategy of facing the unknown is "do something, anything." Some research demonstrates that when SMEs act upon performance objectives such as pursuing personal, noneconomic goals, they may ignore opportunities to increase profits and growth (Wang, Walker, & Redmond., 2007). In addition, these types of enterprises are often relatively resource-constrained businesses that operate in markets fraught with uncertainty, and in this context, may not plan or write down their strategy (Gibcus & Kemp, 2003; Bryant, 2007). They are also prone to exhibit strategy absence (Abosede, Obasan, & Alese, , 2016).

Recruitment of partners was another way of maneuvering through the challenges and unknowns of operating an American school in a Muslim country without diplomatic support. A critical attribute of the successful partnerships was the ability to take risks and be flexible. These characteristics were indispensable in managing the unclear paths of entrepreneurship.

The first recruits were those "that didn't laugh" at the idea of starting a school in Morocco, like the first teachers and the program director who suggested putting two semitrailers together to serve as classrooms. Teachers and administrators who fared well in this environment were described as dreamers and doers. The dreamer was a person who didn't mind the very hot or very cold weather because they were serving a greater purpose of helping. The doers were people who came to Morocco because they wanted to use their talents or knowledge to help others and were not hampered by the lack of resources available.

Hiring persons with the personal capacity and professional commitment to teach in conditions of uncertainty is described as a social-centric aspiration (Liu, 2019). This aspiration is a belief that is focused on a mission to make the immediate society or world better. The co-founders and the individuals they recruited were social-centric entrepreneurs. They thought of the firm as an agent that reflected and acted in an empathetic manner, with the purpose of improving the wellbeing of others. Additionally, Liu (2019) found that social-centric aspirations influence the effectuation tendency towards open-mindedness in forming partnership. This is demonstrated in how the team members recruited people from their social networks to assist in reaching goals or recovering from a challenging incident.

Another method for appropriating the unpredictable was to examine past practice. In 2004, the American School Fez was able to remain open with the visit by the U.S. Ambassador when the status of the American school was unclear within the accepted Moroccan educational systems of the Ministry of Education.

Fifteen years later, its status remained unclear and the school administration was again pressed to obtain authorization from the Ministry of Education of the Kingdom of Morocco. The school owner paid a visit to the Embassy and they refused to get involved. The status of the Rabat school became subject to harassment by competitors due to its unresolved status and it was forced to close. While unsuccessful in this instance, the act of doing something that worked before was engaging past practice. This past practice was a response to navigating the uncertainty in the Moroccan authorization system.

Studies on entrepreneur expertise (Harmeling & Sarasvathy, 2013; Ranabahu & Barrett, 2019) showed that entrepreneurs' responses to the unexpected almost always have elements of effectuation embedded in them. If uncertainty arises from lack of resources, the search for the creation of novelty, or simply from expectations being thwarted by reality, principles of effectuation are present in some form. Ranabahu and Barrett (2019) argue that those strategies in response to uncertainty provide practice for entrepreneurs. They allow them to develop techniques for tackling the unexpected. This was the case with school authorization. When the school in Rabat was being attacked by the competitor, the school owner did as she and J. Hasbrouck had done before and contacted the American Embassy. Although the strategy failed to protect the school, it provided an adjacent idea: to contact a family member of the Moroccan royal family for protection. This led to a meeting with the Ministry of Education and now the schools are protected while their files of approval are being reviewed.

Taking creative and collaborative action. This theme describes the movement of two complementary descriptors: creative and collaborative. Many of the stories required the ideas, energy, and action to analyze what needed to be done to respond to a crisis or to unknown or unpredictable phenomena, or to implement the actions or strategies agreed upon to promote the business. Taking creative and collective action is generated by stories from the effectuation principles called leveraging contingencies and co-creating partnerships.

Based on the Americans' experiences and management practices, the entrepreneurs exhibited a collectivist and egalitarian style of management. In the cultural dimensions tracked by Hofstede (1984, 2011), two cultural dimensions—power distance and individualism—are distinctly different from each other in each country and caused some dissonance for the entrepreneurs.

Power distance is a factor related to how society deals with inequality between people. In countries with high power distance, like Morocco, people with less authority, wealth, or prestige in a society accept and expect that power is distributed unequally. In countries with low power distance, like the United States, there is less acceptance of social inequality and therefore, strives to remove barriers of inequality by endorsing shared power.

Individualism is a factor in which people are expected to make own choices and care for themselves and their immediate family. It is not as important to care for the broader society. A country with low individualism is seen as a collectivist culture, a tight-knit society in which an individual "knows one's place" in life. This is determined socially and has the expectation that family, or members of an in-group, take care of each other in exchange for unquestioning loyalty. According to Hofstede (2010), the United States places value on individualism, rating a score above 90, whereas in Morocco scores rate less than 50.

Whether as part of their natural process or unintentionally, the co-founders placed value on the role and contributions of the individuals and partners with whom they were co-creating the school. This collectivist approach, while according to Hofstede (2010) was not unique to Americans, was the norm for the founders of the school. Moroccans displayed behaviors like inviting the Americans to their homes, showing them the city, and sharing meals together. It is possible that the entrepreneurs interpreted these behaviors as becoming part of the in-group and bestowed high levels of trust on certain Moroccans.

This collectivist approach of school decision-making may have led to a perceived reduction in power distance between the owners and the employees. Americans register at 40% in that dimension, meaning they don’t accept inequality between individuals, and it may explain why the entrepreneurs shared decisions with the Loualis and the expansion team.

In a few instances, giving or sharing authority as an expression of trust has led to betrayal. In the first year, the rupture caused a significant financial setback and an emotional disturbance for the entrepreneurs. Conversely, giving individual authority to Americans as an expression of trust has led to advancement in the school's enrollment, such as program level changes designed by the language school director.

Four distinct cases serve as examples of how shared power may have caused trust to be ruptured and the business to lose revenue: the case of the Moroccan family, the Loualis, who stole tuition funds and defamed the reputation of the American co-founders; the American principal who carried out the daily challenges of operating the school, and who sold a car that did not belong to him and took a loan out on behalf of the school for his personal use while the owners were living in Texas; the Rabat business manager who negotiated a lease agreement for her own school and forced the owner to pay her summer salary in exchange for the release for furniture belonging to them; and in 2019, the secretary of the English language program who skimmed funds from the sale of books and tuition by using an old receipt book.

To frame the discussion, networks are formed for the possibility of accessing resources and benefits others have (Rauch, Rosenbusch, Unger, & Frese, 2016; Shaw, 2006). Given this assumption, connections were formed for mutual benefit between the Americans and the Moroccans. Relational elements included exchange of resources, information, and emotional support between actors in the network (Kerr & Coviello, 2019; Zahra, Newey, & Li, 2014). Galkina and Chetty (2015) and Jiang and Ruling (2019) predicate the motives for networking in much the same way and include the notion of reducing uncertainty and expanding resources. These reasons for networking are revealed in the data, whether connecting with persons still employed at the school for 15 years or those who left the school's employment under dubious situations.

The co-founder often used creative strategies to respond to difficult situations.

When the co-founders were newly arrived in Fez, they learned that, since they were not a diplomatic mission school, they fell outside the purview of the State Department and under the governance of the Ministry of Education. The Ministry of Education strictly enforces Islamic and Moroccan monarchical law. The Americans could not register as a school in Morocco. Instead of closing the school, the clever solution was to establish themselves as a business providing educational services. This unique solution afforded them a temporary status that allowed the school to open its doors and grow to the current enrolment of 240 pre-K to Grade 12 students.

When the financial forecast looked weak in the second year, the co-founder established an American non-profit organization to collect donations and tax-deductible dollars in the form of scholarships to supplement the school's revenue, thereby ensuring its continuation.

Most recently, when the landowner of the previous school demanded a monthly lease amount of U.S. $20,000 for the school building, the owner and business manager formed a new company and leased another school building for about half the amount and with better amenities. This new building helped restore the reputation of the school, which was suffering due to false newspaper accounts of the school's educational programming.

These three stories serve to show that the role of self-efficacy, as defined by Bandura (1997), is critical in problem-solving and repetitive success in any form of problem-solving. Bandura (1997) defines self-efficacy as the conviction that individuals have of successfully executing the necessary behavior for a desired outcome. His research shows that the stronger the perceived efficacy individual has based on experience, the more the person will actively and persistently stretch in the next instance. The cycle of building self-efficacy is evident in the continued success of graduates from the school. Every student who graduates from a university reinforces the evidence that the school, via the entrepreneur, is producing a learned and globally-competitive student body.

Mediated or studied experience suggests that self-efficacy can be developed by observing others believed to have similar skills compared to the observer and can incorporate that behavior with success (Hinz, 2017; Kasouf et al., 2015). This social comparison can lead entrepreneurs to conclude that if others can succeed in performing a given task, such as negotiating or competing for resources, they can as well. This leads to increased self-efficacy (Kasouf et al., 2015). Clearly, the stories about the tumultuous year in Rabat and Fez tested the intensity of the entrepreneur and team’s efficacy, but the fact that they learned how to take a punch, taught them that they used their will and capacity to survive and move towards a successful situation.

The social comparison described above applies to the owner's experience living with and observing her mother tackle various business and home improvement ventures. This was also exhibited by the individuals on the expansion team.

As previously mentioned, some of the team were already engaged in entrepreneurial activity as individuals. The agency shown by the group was encouraged by the school owner. Meeting agendas were created by members of the team at the outset of a meeting. The team visited possible school sites and opined on the appropriateness of each site. The owner posed questions to elicit suggestions and opinions and asked for volunteers for tasks. This shared power promoted an entrepreneurial nature to the activity, with each person presenting, defending, and promoting ideas or rationales for decisions or proposed actions. It is in this way that there was a shift in agency over the years from the two owners to the team formed to sustain a separate campus.

The very nature of interactions between actors can influence individual choices. It is common that stakeholders, such as employees, expect and welcome signs of process approval before making effectual decisions on behalf of the entrepreneur. This may also include making decisions for the benefit of the school which may require maintaining cognitive flexibility (Kerr & Coviello, 2019).

Additionally, the expansion team promoted the collective through ideas like broadcasting the school's history and accomplishments, creating an app for marketing, and designing videos based on the views of alumni. These entrepreneurial actions contributed to the notion that individuals formed a team that initiated and controlled the message generated by the group for the sake of improving what was believed about the school, thereby attracting more clients and generating more income. The communal response to the challenge of losing clients was at the heart of the initiative to benefit the business.

Kerr and Coviello (2019) argue that in network content, resources specificity will shape possible future endeavors. Because the team was comprised of individuals with business and marketing experience, the group generated ideas around publicity and promotion.

Collective cultural actions around creative financial strategies were described throughout this study. The data also revealed that their use was very technical, depending on factors such as nationality, physical appearance, and language proficiency in Arabic, Darija (Moroccan Arabic), French, and English, and even the accents within those languages. These interactions fell under cultural representation. Stuart Hall's (1997) seminal work on representation defined cultural representation as follows:

> Representation means using language to say something meaningful about, or to represent, the world meaningfully, to other people. You may well ask, “Is that all?” Well, yes and no. Representation is an essential part of the process by which meaning is produced and exchanged between members of a culture. It does involve the use of language, of signs and images which stand for or represent things. (p. 1)

Specifically, the positionality used by the entrepreneur and his/her associates aligns with system of representation (Eley, 2015). One system of representation includes the many and varied concepts and recollection that are linked to mental representation which help us make meaning of our lives. It is a way of organizing, clustering, arranging and classifying concepts, and of establishing complex relations between them (Hall, 1997). Moroccans organized what they believed about Americans and positioned their dealings with them accordingly. Americans classified certain Moroccan behaviors and managed their dealings with them accordingly. Moroccan fathers knew how Americans would be treated by other Moroccans, so they assisted in financial transactions that would benefit the school.

The intersection of factors related to systems of representation afforded a person influence and power in a given exchange—depending on how a person acted and was perceived, certain cultural representations were created and acted upon. Bartering was the most prevalent. Moroccans were not able to barter directly for a favorable tuition fee, but did barter with other Moroccans on behalf of the school for improved prices, such as facility lease or professional services. Moroccans working as volunteers were not given the discounts they expected to receive, so instead the Americans formed a committee that could give a discount to them or whomever the owner believed warranted a savings based on financial status and student performance. The committee, primarily made up of transient Americans, was established to remove favoritism from the discount process.

Other strategies were very specifically based upon family and friend connections to obtain favorable pricing on items, quality service, or quick service. The person who made the recommendation was vouching for the service or product provider, in this collectivist society.

On the other hand, transient Americans could refuse to acknowledge funds owed or speed limits violated while driving by feigning the ignorance of the history of the situation, the law, or the language.

This positionality was and is malleable and interactive. Understanding the merits and deficiencies of the circumstances of the representations in each situation was critical to its success or a factor in its failure.

Weighing options and developing criteria. J. Hasbrouck’s rhetoric, including the use of phrases such as “exceeding affordable loss,” “lost more money than we wanted,” “throwing good money after bad,” and “just blowing cash” directly point to the realization that the funds needed to operate the school had surpassed their appetite for sustaining the venture. The Americans made a vow to get through the first school year “come hell or high water” and they “would not drop anything.” In the second year, when they were living back in Austin and continuing to send funds from their personal accounts, the then-principal questioned their faith, and they banded together to “get through” the second rough year. M. Forciea worked with a small group to start a non-profit organization to maintain the Fez school in the black.

It was the Schumpterian (1934) entrepreneurial notion of the “will to fight” construct, coupled with the participation of a key partner, the principal who had been recruited from Austin, Texas, to run the school in Fez, that re-calculated the affordable loss in other than financial terms. This re-calculation pitted J. Hasbrouck's closing the school option or “giving up” against the option of “keeping the faith” and “getting through it.” M. Forciea weighed those options and fought against giving up by exploring other mechanisms to keep the school open. In other words, at every stage of the development of the school, the co-founders, then later the administrator and co-founders, were weighing their options, sometimes against the possibility of closing, but usually around the examination of the possibilities to remain functional.

According to a study of original aspirations in entrepreneurship carried out by Liu (2019), one entrepreneur faced two funding options from his investors, with one offering a higher valuation and more financial and business resources, and another with a lower valuation and full control over his own business. The entrepreneur chose to take the lower valuation option with full control because it reflected his reasoning for starting the business in the first place. This study illustrates how the founders' original aspirations served as a guiding principle to help them make decisions when they faced a dilemma. In the first years of opening the school, the decision-makers returned to their reasoning for opening the school in order to reinvigorate themselves and push through the challenges they were facing. This is an example of the resilience that d'Andria, Law, Gabarret, and Vedel (2016) argues that entrepreneurs need to develop in order to cope with uncertainty. It is also an expression of what Liu (2019) found in her study, that when the social impact of a venture is not as clear as financial calculations, it can be complicated to measure. A social-centric entrepreneur must then adapt to circumstances and adopt measuring short-term goals in accordance with their inner belief and the resources on hand. In this way, they are able to evaluate their progress incrementally, which fits perfectly with effectual logic.

During the spring of 2017, the expansion team began a process loosely based on an action research cycle (Anderson, Herr & Nihlen, 2007; Lewin, 1944; Friedman, Gray & Ortiz, 2018; Stringer, 2014) to begin to identify the challenges, gather data or information, plan, and implement actions that would resolve or address challenges and continuously evaluate the team's progress. Knowing that business tasks were complex and the learning process usually self-regulated and informal (Keith, Unger, Rauch, & Frese, 2016), prioritizing efforts was critical. The most critical challenges selected by the group in order of importance were authorization of both schools, followed by parent loyalty/buy-in, and financial crises caused by the first two challenges. Given these challenges, the team set about planing strategies with the long-term goal of the country-wide creation of schools. Recent studies have shown that entrepreneurs use effectual and causal logics depending upon external factors, such as being in the venture stage, resource positioning, and levels of uncertainty (Sitoh, Pan, & Yu., 2014; Reymen et al., 2015), and these factors were affecting the strategies articulated by the team. By setting out strategies, naming responsible parties, and selecting time frames and deadlines for gathering information, the team was enacting the notion Sitoh et al. (2014) argued, that effectual and causal logic can coexist.

This development of a planned strategy session reflected an incorporation of causal logic into an effectual approach and is supported by Nummela, Saarenketo, Jokela, and Loane (2014) and Kraus, Frese, Friedrich, and Unger (2005), who believe that companies shift their applied decision model according to firm size. Now that the leadership included more than the two people who initially created the school in 2004, it follows that a more concerted effort of business advancement was needed.

After the group decided on the strategies and how it might measure progress, the team executed the strategies and, often, research notebooks reflected that intermediary decisions would need to be made. It was in these moments that legitimacy (or approval) was sought by team members from the owner. She listened, asked questions, sometimes requested an opinion, and gave instructions on how to handle the next step. Some of these instances are supported in the work of Crick and Crick (2014), Ciszewska-Mlinaric, Obloj, and Wasowska (2016), and Guo et al. (2016), who found evidence for alternating phases of both logics, or that the use of effectual and causal logics may depend on the decision context (Nummela et al. 2014; Vershinina, Barrett, & McHardy, 2017).

The idea of decision-context needs its own exploration and is beyond the scope of this study, but during the period when the team employed the more deliberate process of advancing the schools, it was an effectual, followed by casual, logic that organically grew from team discussions.

For example, during session 3 on June 28, 2018, the expansion team reviewed the current situation for the top three challenges identified in May (authorization, parent buy-in/support, and finances), discussed the issues that framed the current situation, and then formulated options (Table 11). This process reflected a purposeful analysis of what the team self-reported to be the problem, what factors were present, and what the current possibilities were to solve the problems. This was effectual practice of a means-driven decision-making process. The team examined what it knew (the data gathering results) and what it had (partnerships, money, time) and developed a number of possibilities based on their resources. This was a clear expression of effectual logic.

After they teased out details of the possibilities, there was a discussion of what the team's aims were, and those were set in motion. The team developed three criteria (Table 12) and used those to aid in the decision of which option to pursue, given its predetermined goal of Morocco-wide school expansion. This portion of the deliberations was casual logic, or a goal-driven heurstics, and dictated the entrepreneurial actions. Because the conditions around authorization were threatening the Fez school, and not the Rabat school as much, and finances for both schools were tight, the situation mirrored what Laine and Galkina (2017) studies show, that when perceptions of institutional uncertainty change, they affect the intensity of effectuation and causation logic.

Further, the combined process demonstrated what Reymen et al. (2015) argued, that entrepreneurs will switch between effectuation and causation, depending on contextual factors such as the level of environmental uncertainty, resource positioning, and stakeholder interaction. The level of uncertainty was relatively high, money was low, and stakeholder, in the form of committed team members, was high. These conditions were in line with York and Venkataraman (2010) and Dew and Sarasvathy (2007), who assume that uncertainty in environmental opportunities is the key driver for innovation and that causal principles get used more often once the decision about existing artifacts like products, services, markets, or technologies are made.

In the status report at the beginning of July, the owner shared the following: that the authorization application was still in process and the architect was not easy to reach, and therefore momentum was slow but steady; with the landlord declining the re-negotiation, the school had no choice but to close at that location; and the owner and the second partner would be traveling for the summer and would not be available to meet until the fall. As the team reflected on the status report and assessed what was still possible, it was evident that the tenets of affordable loss were clearly regulating the final decision to not re-open the school in Rabat in the fall of 2018, but instead to obtain full authorization, advertise, and recruit aggressively in the spring of 2019 and re-open with or without partners in the fall of 2019.

Whereas affordable loss principles in effectuation means setting a limit and not surpassing that limit (Dew & Sarasvathy, 2007; Sarasvathy, 2008), the decision about what the team could afford to lose included non-financial elements as well. The decision included communicating with Rabat school families to avoid losing their trust, and maintaining a stable relationship with the member of the royal family and the potential new partner who owned property in the Soussi neighborhood of Rabat where we might re-open the following year. The effectuation principle—acknowledging and leveraging the unexpected—impacted an effort to build deliberate practice through these expansion team sessions.

Deliberate practice refers to the process of achieving expertise through self-regulated, effortful, and repetitive activities, first described by Ericsson, Krampe, and Tesch-Römer (1993). Since then, numerous articles have been written about the topic. According to researchers, deliberate practice must (a) have a well-defined performance improvement goal, (b) be undertaken with a desire to improve, (c) include feedback for improvement, and (d) allow opportunities for repetition and gradual modifications (Ericsson 2006, 2008).

Implications of the Study

The Themes, Theories and Implications section provided ample evidence that this study answered my research questions. The multitude of stories, and interpretations of those stories, provided evidence for how the entrepreneurs used various cognitive strategies during the business creation stage and the team during the expansion stage. In this next section, I will focus on answering the second research question regarding how these strategies helped or hindered the development and the expansion of the venture.

The themes, and the research related to themes, helped the researcher reach the conclusion that, in this study, some principles were more relevant than others. The most prominent and useful principle utilized in starting a business was considering available means, or the examination by the entrepreneur of who they are (skills, education), what they know (experience), and who they know (friends, family, etc.) as a means of gathering assets. This principle was highly effective in the business launch. It was equally relevant when the business expanded, but because the entrepreneur now had established connections with a network of Moroccans and expatriates from various countries, the human capital was more impactful than it was during the start-up period. It was now a collective use of means orientation.

The second most active principle utilized was the agency of the entrepreneurs. Without prediction models available to the nascent business founders, the entrepreneurs acted on their own accord to seize opportunities prior to launch and during the first years of operation. The energy expounded at the start-up phase was that of the founders, based on previous experience and knowledge and a limited understanding of Moroccan culture and norms. During expansion, co-founder M. Forciea used her experience in starting and operating the Fez school to launch the Rabat school, a second similar venture, and seized opportunities to connect with partners and solidify relationships with stakeholders.

Leveraging contingencies, or the principle of turning unpredictable events into a benefit when uncertainty is almost guaranteed, was enacted on several occasions in Phases One and Two of this study. Given the unknown infrastructural conditions in Fez, the limited familiarity with Moroccan families and potential clients, and the lack of language fluency in the early years, there were several times when situations were potentially destructive to the business and even the personal standing of the family. This occurred to a lesser degree in the expansion phase in the school in Rabat because the Moroccan staff defended the initiative taken by the entrepreneur. In these damaging or challenging instances of unpredictability, the co-founders and, later, the expansion team were able to weather the difficulties by using another effectuation principle, strategic partnering. By reaching out to influential persons or entities, like the U.S. Ambassador or the owner of a Canadian school who owned a school building in Fez, a shift occurred and failure was averted.

Strategic partnering is defined as obtaining pre-commitments with parties the entrepreneurs can trust. At the outset of the venture, securing pre-commitments from service delivery partners, like school marketers and administrators, was easily obtained from a small group of people. Most client pre-commitments came before the school opened, as marketers engaged in recruitment after the founders arrived in Fez. In the expansion phase, pre-commitments of administration services were contracted prior to recruitment of clients. Marketing strategies did not result in pre-commitments of clients or staff until just before the school opened.

The Who I know portion of the means orientation principle was actively linked to the pre-commitment facet of the expression of the strategic partnering principle. The co-founders and the expansion team formed partnerships with people they knew and thought they could trust. Because the expansion team included more Moroccans than the founders included in the initial start-up, it naturally multiplied the possible partners and pre-commitments.

In this study, there were significant instances of partnering with Who we know and of obtaining commitments along the way. In the findings, we learned that founding families recruited their extended families once the school had been open and had remained open after the initial challenges. Leasing buildings and maintenance was based on the relationships of school parents or local faculty and staff. Members of the expansion team knew key business associates with the ability to make certain transactions possible, in terms of authorization and building ownership and use. The cultural dimension of collectivism in Moroccan culture explains how strategic partnering occurred in Morocco. Elements of trust was why pre-commitments were rare and commitments "as we go" were prevalent.

The principle of affordable loss, or the identification of how much the entrepreneurs could afford to lose and how to minimize loss, was the least relevant principle in effectuation theory in this study. While the business plan, written by one co-founder prior to the move to Morocco in 2004, included a budget estimating revenue and expenses, the set amount they were willing to lose was almost non-existent in the first year. In the expansion project, funds from the Fez school covered expenses at the Rabat school when it was underperforming financially. In the spring, when the team began using a method for weighing options and determining action, the factor of affordability became critical in decision-making.

Design Model for Entrepreneurs in Two Stages of Development

This study indicates that principles of effectuation were warranted and effective in the start-up stage, and a blended approach of effectuation and causal was necessary in the expansion phase. This supports findings by Laine and Galkina (2017), Reymen et al. (2015) and Dew et al. (2018).

Two diagrams (Figures 5 and 6) illustrate the ways that evidence and implications from this study can be utilized by entrepreneurs in framing future endeavors within the Moroccan context and environment. In both diagrams, the solid hexagons with text are staples of the venture, and hexagons with icons are elements to be considered.

Figure 5 represents the elements of the creation phase. It shows solid hexagons for the necessary elements. The icon hexagons are power, flexibility, and authority. The power on-off button icon represents power dynamics. The backflip person-icon represents flexibility. The hexagon with a person standing on an arrow, with others holding the arrow, represents authority.

In the initial phase of a business launch, the elements needed are local and native partnerships, a sense of urgency with an experimental approach, and persistence based on values.

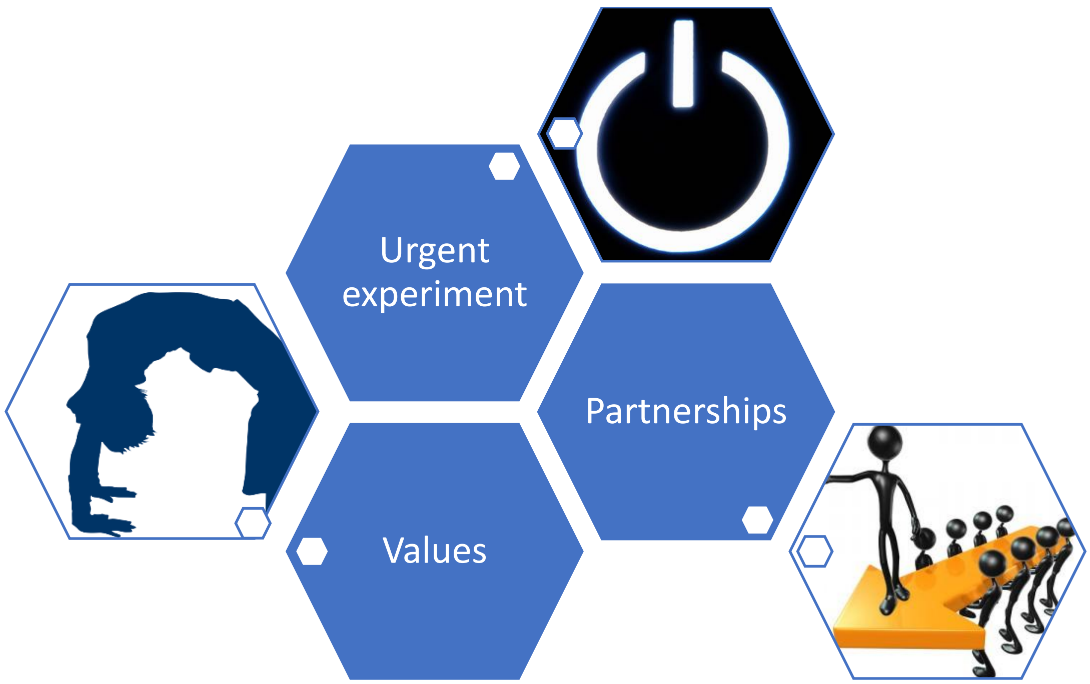

Figure 5. Creation phase of entrepreneurship in Moroccan context.

Figure 6 represents the elements of the expansion phase. The newly introduced icon hexagons represent additional concerns or elements that should be considered. The tree represents the environment, such as market niche, socio-economic status of market, and other factors that may be different from original project. The dollar sign inside the head represents management of affordable loss.

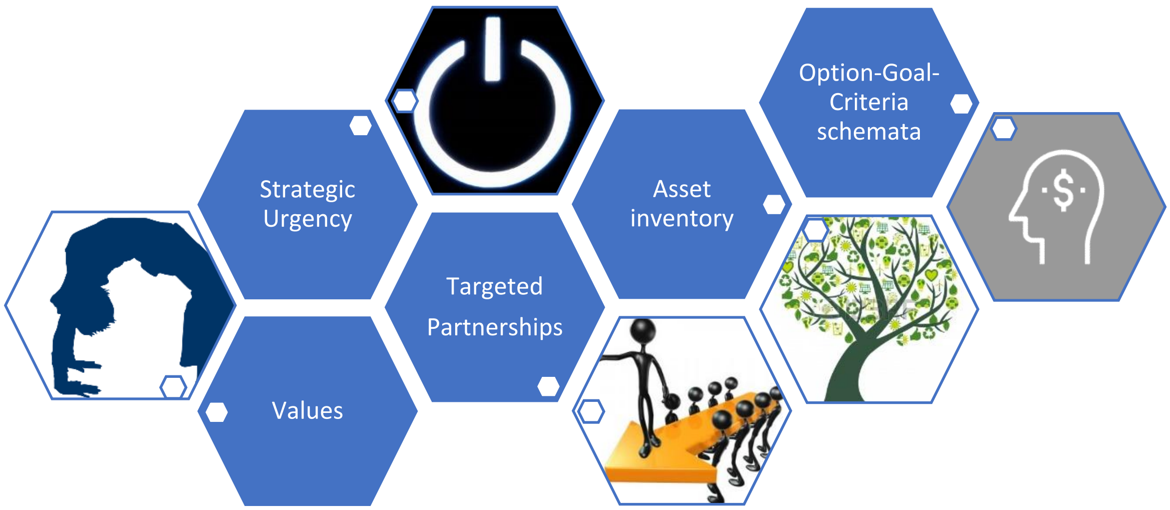

Figure 6. Expansion phase of entrepreneurship in Moroccan context. In the expansion phase of a business growth, the elements needed are definition of values, a sense of urgency with a strategic approach, targeted partnerships, asset inventory, and an option-goal-criteria decision-making schemata or system.

Recommendation for Future Research

It is likely that, because secularism is an "implicit norm in organizational research" (Miller, 2015, p. 189), spiritual capital is a neglected or ignored variable in entrepreneurship. This study offers insights into the role of faith and values in entrepreneurial practice. This researcher echoes the call by Neubert and Halbesleben (2015) and Busenitz and Lichtenstein (2019) to address an understudied concept in the field, because it may illuminate more insights in future research.

Studying the nature of entrepreneurial decision-making is essential for entrepreneurship research (Shepherd, 2014; Shepherd & Patzelt, 2017), and therefore drilling down into the instances where the virtue of trust was violated, and the reasons why it was violated, would be important to explore for future intercultural studies.

Another area of study for future research might be to learn what entrepreneurs do to cope with the difficulties of business ownership. In this study, we learned a few business-related strategies, like partnerships and assessing possible loss, but the emotional and psychological trauma associated with failure or threats to life-long investments are unexplored.

Conclusion

The significance of this research lies in its ability to illuminate some notions of our academic understanding of how entrepreneurs navigate the ambiguity of creating and growing a business and also the ways that we can amplifying that understanding by including effective notions of entrepreneurship, such as fear, trust, and faith. These concepts underlie most of what surfaced to the level of themes to be linked to effectuation theory, innovative entrepreneurship and social embeddedness of entrepreneurship.

The other contribution made by this study is the interrelationships of the principles of effectuation logic and how cultural representation systems played a role in the expression of those decision-making strategies and actions. The influence of cultural actors, like Moroccan parents, American and Moroccan teachers, school alumni, and even the prince of the Kingdom of Morocco is socially constructed and considered in entrepreneurial actions. How affordable loss is conceived of is not limited in a high-context environment by profit alone. Certainly, original aspirations are as contagious as the circle of the co-creation of partnerships.

This endeavor started as an aspirational curiosity. It has personally and professionally tested my ability to persist and be resilient. The intersections of effectual and causal thinking within social and cultural contexts in Morocco and America have framed this experience for me as a researcher. Its expressions vary. Assets shift. Sometimes decisions were neither collective nor creative. Ambiguity was very certain. The research regarding spiritual capital informed that faith can be a strong indicator of resilience. It has been, throughout the 15 years of the entrepreneurial journey of M. Forciea.

The Facebook post by the primary referent in this study, Michelle Forciea, speaks volumes:

> A year and a half ago I was in a darker place and got a tattoo in Arabic, “Life,” and showed it with the tagline “It’s not about waiting for the storm to pass, it’s about learning to dance in the rain.” My friend, Salim, designed my upgraded Arabic calligraphy tattoo that reflects where I am now. It reads, “Life is Beautiful.”

Figure 7. Tattoo of “Life is beautiful” in Arabic.

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Appendices

Appendix A: Interview Questions

For owner of American School:

1. Please tell me about yourself.
2. Why did you want to establish a school in Morocco?
3. When did you start the process of establishing the school? Why then?
4. Why a school?
5. Who helped you? How did they help?
6. Where did you get the funding? Why did you do it that way?
7. Tell me what type of authorizations or licenses did you need start a business?
8. How did you manage the Bureaucracy?
9. How much time did you spend in Morocco before you started the school? What did you do during that time?
10. Tell me about a typical day of that time (your routines, your family life, your social life)
11. Why did you move here full-time? What was your role? Tell me about a typical day of that time.
12. What were/are the biggest challenges with local community?
13. What were/are the biggest challenges with the operations of the school?
14. What were/are the biggest challenges with American associates?
15. What were/are the biggest challenges with Moroccan associates?

For associates:

1. How did you first learn about the school?
2. What drew you to the school?
3. What were you doing then and how did you come to decide to join the organization?
4. What was your role? Tell me about a typical day of that time.
5. Tell me what the school was like at the beginning (give dates, please)
6. What happened that caused the school to have problems or success?
7. What did the owners do?
8. Tell me why that either worked or didn’t.
9. What did not go well? Why do you think it didn’t go well?
10. What challenges in building the business?
11. Tell me anything you think I should know about the owners in their efforts to build or grow the American school here in Fez.

Appendix B: Participant Consent

Understanding Effectuation Theory as an entrepreneurial cognitive process in firm creation and expansion to create local, contextual knowledge in Morocco

University of the Incarnate Word

Introduction:

You are invited to participate in research about how entrepreneurs establish American schools in the Kingdom of Morocco. The qualitative study is being conducted by Ada A. Gonzalez, a Ph.D. candidate at the University of the Incarnate Word, under the faculty supervision of Dr. Noah Kasraie, Professor at the University of the Incarnate Word in San Antonio, Texas, USA

You are invited to participate in this study because you have knowledge about how an individual or collective established an American School in Morocco and were or are involved in its establishment as an educational enterprise.

Purpose of the study:

This study of a case focuses on the entrepreneurial cognitive processes and enactments of an American entrepreneur and the educational team in the establishment and expansion of an educational institute in the host country of Morocco. The study aims to learn the ways in which entrepreneurs operate within their dual spatial, social and cultural contexts and how and what varied strategies they utilize based on their approach, in order to collaborative framework using entrepreneurial processes and practices to create local, contextual knowledge.

Procedures:

If you agree to participate in this study, you will be interviewed by the principal researcher via digital audio recorder or you will participate in group meetings that will be audio recorded. The recorded interview or session may last between 30 to 120 minutes. If we mutually agree that a subsequent interview or sessions would be useful, subsequent interviews or sessions may be scheduled at the interviewee's convenience. The subsequent interview or session may also run 30 to 120 minutes. We may use email to clarify or expand on any information gathered during the interviews.

We request that you share documents we consider essential to capturing the context of the establishment of the school, such as photographs, newspaper articles, journals or other items that provide insight to the understanding of your experience. These may be shared or retracted from the archives of this study at any time during the study.

Ada A. Gonzalez and the faculty supervisor, Dr. Kasraie, are the only persons that will have access to the full set of research documents, including, but not limited to, digital recording, journals, notes, photographs and or paraphernalia accumulated during the research phase.

Risks and Benefits of Being in the Study:

There is minimal risk to you. It is possible you might be uncomfortable talking about the challenges or difficulties you have faced or financial information. The researcher will attempt to minimize the discomfort by stipulating that you to only share that which you believe will contribute to furthering the body of knowledge of entrepreneurship as a discipline, and not as proprietary information.

Confidentiality:
Below you are provided a choice to remain confidential or to allow us to use your name in the study. If you choose to remain confidential, a pseudonym will be used to hide identifying characteristics. If you allow us to use your name, your name will be used when necessary and when the benefit to you is greater than the risk.
All research records, including documents, artifacts or photographs of artifacts, will be stored in a password protected cloud drive, accessible only to the main co-researchers.

Duration:
This study will be conducted for up to two years. Data collection will be conducted in the summer of 2017, followed by analysis and follow-up interviews in the fall of 2017. The analysis and findings of the study will frame the duration of the study and its final publication date.

Voluntary Nature of the Study:
Participation in this research study is completely voluntary and you can withdraw from being interviewed or stop your interview from being utilized at any time in this study. Please notify us in writing if you do not wish us to use any information gathered at any time.

Contacts and Questions:
The University of the Incarnate Word committee that reviews research on human subjects, the Institutional Review Board, will answer any questions about your rights as a research subject. You may contact them at 1-210-829-2759. For questions about the research study and your participation you may contact Ada A. Gonzalez at aagonza1@student.uiwtx.edu or 1-210-421-9454 or Dr. Kasraie at kasraie@uiwtx.edu.

Statement of Consent:

Your signature indicates that you (1) consent to take part in this research study and (2) that you have read and understand the information provided.

____

- ☐ I give permission to audio record interviews and conversations with the researcher.
- ☐ I give permission for researchers to use any documents I provide for this study

Select one:

- ☐ I choose to **remain confidential**. My name and identifying information will not be used in publications and presentations resulting from this research

or

- ☐ I want my **name and other identifying information to be used** in publications and presentations resulting from this research, at the researcher's discretion.

Participant Name ______________________Participant Signature____________________

Date_________

Researcher Name______________________

Researcher Signature_____________________________

Date _________