

2020

## Strategies to Identify and Implement Meaningful Measurements for Nonprofit Organizations

Michael Dillard  
*Walden University*

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# Walden University

College of Management and Technology

This is to certify that the doctoral study by

Michael Dillard

has been found to be complete and satisfactory in all respects,  
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## Review Committee

Dr. Janice Garfield, Committee Chairperson, Doctor of Business Administration Faculty

Dr. Karin Mae, Committee Member, Doctor of Business Administration Faculty

Dr. Denise Land, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer and Provost  
Sue Subocz, Ph.D.

Walden University  
2020

Abstract

Strategies to Identify and Implement Meaningful Measurements for Nonprofit  
Organizations

by

Michael Dillard

MBA, DeVry University, 2001

MSS., United States Army War College, 2009

BS, Virginia Commonwealth University, 1983

Consulting Capstone Study Submitted in Partial Fulfillment  
of the Requirements for the Degree of  
Doctor of Business Administration

Walden University

January 2021

## Abstract

Leaders of nonprofit organizations lack strategies to identify and implement meaningful measurements to secure funding from their stakeholders. Nonprofit leaders who continue to face challenges with securing funding might fail to achieve their organization's missions. Grounded in the stakeholder theory and the Juran trilogy, the purpose of this qualitative single case study was to explore strategies three senior business leaders of a nonprofit organization in the mid-Atlantic region of the United States used to secure funding from their stakeholders. Data were collected from semistructured interviews, documents from the nonprofit organization, and public sources. Using Yin's 5-step thematic analysis process to analyze the data, three themes emerged: meaningful measurements, employee engagement, and stakeholder demands. A key recommendation is that nonprofit leaders develop and maintain a performance measurement system that encompasses key performance indicators. A performance measurement system and funding by stakeholders could result in positive social change by providing effective and additional community programs and services within the mid-Atlantic region and additional revenue for the nonprofit leaders to continue to provide needed programs within the community.

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## Dedication

To God who provided me with the daily strength to complete this doctoral study. I also dedicate this doctoral study to my wife and daughters who have always provided support to allow me to pursue and achieve my accomplishments.

## Acknowledgments

I would like to thank Dr. Janice Garfield, my chair, for her guidance, feedback, and support through my doctoral journey. Thanks to my second committee chair, Dr. Karin Mae for her support and feedback on my study. Thank you, Dr. Denise Land, for your support and guidance as the University Research Reviewer for my study. I would also like to thank my family, friends, and fellow scholars for their continued support, mentoring, and coaching to help me through my doctoral study journey.

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## Section 1: Foundation of the Study

In this study, I served as a scholar-consultant to the leader of a nonprofit organization selected by Walden University consultant capstone administrators as required for the consultant capstone doctoral study. I used the 2019-2020 Baldrige Excellence Framework criteria to explore strategies leaders of nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions.

### **Background of the Problem**

Business leaders of nonprofit organizations face challenges to demonstrate their organization's value and the impact of their organizational programs to stakeholders and donors. Financial measures of performance are a major resource to demonstrate an organization's performance in for-profit organizations, but they might not be adequate for nonprofit organizations (Knox & Wang, 2016). Nonprofit organizations are mission-driven, so leaders face challenges in measuring the effectiveness of organizations by financial metrics (Velli & Sirakoulis, 2018). Because of the increased worldwide competition in the nonprofit sectors, business leaders of nonprofit organizations are being scrutinized on the effectiveness of their organization (Schubert & Boenigk, 2019).

Funders are requiring extensive monitoring and reporting of performance information, so nonprofit organizations are focusing more on performance management (Knox & Wang, 2016). Many organizations provide success stories about their services but are not able to conceptualize those stories quantitatively (Knox & Wang, 2016).

Stakeholders and donors have posed higher demands on nonprofit organizations to provide more elaborate information about the organization's programs and services (Bodem-Schrötgens & Becker, 2020). Nonprofit organizations require a mix of input, process, output, and outcome measures to provide stakeholders and donors with a clear picture of the value of their organizational programs (Lee & Clerkin, 2017).

### **Problem Statement**

The leaders of nonprofit organizations cannot sustain business operations without adequate funding (West & Ries, 2018). Despite the \$390.05 billion that nonprofit organization leaders received in 2017 from private donors and charitable donations from foundations and businesses (Lange, 2019), it is very difficult for organizational leaders to raise funds required for the long-term functioning of an organization to achieve its mission (Hommerová & Severová, 2019). The general business problem is some leaders in nonprofit organizations have limited knowledge of strategies to secure and sustain funding. The specific business problem is some leaders in nonprofit organizations have limited knowledge of strategies to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions.

### **Purpose Statement**

The purpose of this qualitative single case study was to explore successful strategies leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. The target population consisted of

leaders of a nonprofit organization in the mid-Atlantic region who had experience in using strategies to sustain funding for the organization. The implications for positive change are that perusing, implementing, or modifying the findings might enable nonprofit leaders to develop strategies to identify meaningful measurements that demonstrate the efficiency and effectiveness of programs and identify the derivative implications for effecting general beneficial change.

### **Nature of the Study**

Three types of research methodologies researchers use are qualitative, quantitative, and mixed methods (Yin, 2018). A qualitative research methodology was used for this study. Qualitative research involves collecting qualitative data or data that can be observed to learn more about how groups operate in a setting (Keenan, 2018). I designed this study to provide an understanding of strategies leaders in nonprofit organizations used to identify meaningful measurements to provide evidence of efficient and effective programs and processes to secure funding to support their operations and missions. The quantitative method entails an experiment or questionnaire design to examine variables' characteristics or relationships, which are measured numerically and analyzed using a range of statistical and graphical techniques (M. N. Saunders, Lewis, & Thornhill, 2015). I did not select a quantitative research methodology for this study because I did not intend to examine variables' characteristics or the relationships among variables. Researchers use mixed methods to combine the elements of the qualitative and quantitative research methodology to increase the breadth and depth of understanding of phenomena (Alavi et al., 2018). I did not select the mixed methods methodology because



the quantitative research methodology was not necessary to address my study's purpose. Therefore, the qualitative methodology was most suitable for this research study's purpose.

I used a single qualitative case study design for this study. Three designs that researchers use in a qualitative study are phenomenology, ethnography, and case study (Yin, 2018). Yin (2018) concluded that using a case study enables researchers to develop an in-depth inquiry into a topic and relies on multiple data types and sources for exploring subject phenomena. A case study can be designed to help a researcher identify what is happening and why (M. N. Saunders, Lewis, & Thornhill, 2015). Yin found that researchers might choose to use a single case study that requires the observation of one unit or a multiple case study that requires the observation of multiple units. A single case study design was appropriate for this research because the goal of this study was to explore what strategies nonprofit leaders in one organization in Maryland used to provide evidence that their programs and processes were effective. Researchers use ethnographic design to study the culture of the social world of a group (M. N. Saunders, Lewis, & Thornhill, 2015). The ethnographic design was not appropriate for this research study because the goal was not to understand the culture of a group. Phenomenological researchers attempt to learn about the life experiences of a study's participants (Mohajan, 2018). The phenomenological design was not appropriate because I did not plan to gather data about the personal meanings of participants' life experiences for this study. Therefore, a single qualitative case study design was the most suitable for this research study.

### **Research Question**

The overarching research question was:

RQ: What strategies do leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions?

### **Interview Questions**

1. How do you review your nonprofit organization's capabilities and performance?
2. What strategies do you use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for your nonprofit organization?
3. How did you identify the meaningful measurements of programs and the key processes for your nonprofit organization?
4. How did you assess the effectiveness of your measures for your nonprofit organization?
5. What measures did you try that did not prove to be useful for assessing the efficiencies and effectiveness of your nonprofit organization's programs and processes?
6. How do you track and report data and information on daily operations and overall organizational performance for your nonprofit organization?

7. How do you use findings from reviews of performance measures to improve key processes for increasing and maintaining donations for meeting your nonprofit organization's performance?

### **Conceptual Framework**

The conceptual framework I used in this study was Freeman's stakeholder theory. Freeman (1984) said the key objective of a business is to create value for all stakeholders who can make an impact or be impacted by the business. Freeman (2010) defined stakeholders as those individuals or groups who can affect or be affected by the achievement of a corporation's purpose, such as customers, suppliers, employees, owners, environmentalists, consumer advocates, media, governments, and global competitors. According to the stakeholder theory, stakeholders depend on the corporation and other stakeholders to satisfy their interests, and leaders view meeting and exceeding the stakeholders' interests as key to the corporation's ongoing success (Harrison & Wicks, 2013). I used the stakeholder theory to understand the strategies nonprofit leaders used to identify and implement meaningful measurements to provide evidence of efficient and effective programs and processes to secure funding for their nonprofit organization's missions.

According to the stakeholder theory, organizational leaders are accountable to various stakeholders who have a direct interest in the corporation's activities and can impact or be impacted by those activities (France & Regmi, 2019). Nonprofit leaders should prioritize stakeholders and their needs according to the stakeholder's power, legitimacy, and urgency (Shea & Matthew, 2015). Freeman (1984) stated that nonprofit

leaders' behavior is influenced by these stakeholders. I used the stakeholder theory because the focus of the stakeholder theory is leaders' consideration of the interests of customers, employees, and donors, with the expectation the leaders will secure and sustain funding for the organization.

Also, I augmented the stakeholder theory with the Juran trilogy model. The three functions of the Juran trilogy of managing for quality are quality planning, quality control, and quality management (Bisgaard, 2008). According to the Juran trilogy: (a) quality planning consists of building quality into the process from the beginning, (b) quality control is about maintaining the performance of the process, and (c) quality improvement consists of changing the processes to improve the organization's performance (Bisognano, 2004). According to the quality planning function of the Juran trilogy, the leader provides tools, formal standards, measurements, and data on performance (Bisgaard, 2008). I used the Juran trilogy method because the quality functions directly addressed the development of the organization and process metrics.

### **Operational Definitions**

*Nonprofit organization:* An organization that commonly performs some type of public or community benefit, without the purpose of making a profit (USA.gov, 2020).

*Stakeholders:* All groups that are or might be affected by an organization's actions and success (Baldrige Performance Excellence Program, 2019).

## **Assumptions, Limitations, and Delimitations**

### **Assumptions**

Assumptions are the researcher's beliefs, expectations, or considerations regarding the underlying theories, causal relations, study setting, and population, sampling strategies, data collection, data analysis, and research interpretations that may influence research outcomes (Marshall & Rossman, 2016). In this study, I assumed the three senior leaders interviewed provided honest and truthful information for their interviews. I assumed the senior leaders provided organizational data and information that was accurate for my review and analysis. I assumed using the 2019-2020 Baldrige Excellence Framework as a tool would help to ensure my assessment of the organization's values, processes, improvements, and results reflected a holistic and system-based approach to evaluation. Also, I assumed using the criteria for performance excellence in the Baldrige Excellence Framework as a tool to evaluate my client's organization would provide me with a systematic perspective for the evaluation of the research question.

### **Limitations**

Limitations are potential weaknesses the researcher determines are related to the research design, statistical model constraints, funding restraints, and conclusion of the study (Theofanidis & Fountouki, 2018). I was limited in his study because I focused on data and information provided by the senior leaders of a single organization. I obtained data and information from my participants using conference call technology instead of face-to-face conversations, based on the guidelines of Walden University, which might

have been a limitation that was within my control. My compliance with Institutional Review Board (IRB) preapproved sources of protocols for data collection was mandated and not in my control. Also, I was limited to time requirements and expectations imposed by Walden University for continuous progress to collect data from the consulting client organization to complete the doctoral study.

### **Delimitations**

Delimitations are the boundaries or limits of the study the researcher decides to set to ensure the objectives and aims of the study are possible (Theofanidis & Fountouki, 2018). For this study, delimitations were that I obtained information and documents from three senior leader interviews from a single nonprofit organization in the mid-Atlantic region. I did not obtain information and experiences from senior leaders of other nonprofit organizations within other areas of the United States, which was a delimitation. I delimited research to strategies that nonprofit leaders can use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's mission.

### **Significance of the Study**

The findings of this study have potential practical application to business practice and implications for social change. Consequently, the results of this study may provide strategies nonprofit leaders can use to develop and implement measures to help improve their programs for meeting and exceeding donors' expectations to secure funding for their organization. Additionally, the results of this study may also add value to businesses by providing options for nonprofit leaders to align key processes with their organizational

goals, thereby increasing their opportunity to secure sustainable funding for benefitting communities' neediest citizens.

### **Contribution to Business Practice**

The findings of this study might have practical application for business practice. Nonprofit leaders might gain knowledge to create sustainability and growth in their organizations through increased efficiencies for catalyzing donor funding, leading to an increased potential to finance key programs to fulfill their organization's missions. The contribution to business practice is that the strategies identified in this study can be used as a guide for nonprofit leaders to identify and implement metrics for the performance of programs and key processes to help generate cost savings and increase donations for their organizations.

### **Implications for Social Change**

Implications for social change as indicated by the study findings potentially include enabling nonprofit leaders to develop and deploy effective strategies to secure and sustain funding to ensure their organization's sustainability and growth. Additionally, the findings of this study may be a catalyst for social change by providing meaningful measurements for nonprofit leaders to provide evidence of effective programs and processes to secure funding for their organization. When nonprofit leaders have the strategies, processes, and tools they need to monitor their organization's performance and sustain business operations, they could provide necessary services to members of their local communities.

### **Review of the Professional and Academic Literature**

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's mission. The pressure for measuring the performance of nonprofit organizations is due to the increased accountability requirements from stakeholders such as donors, communities, and clients (Velli & Sirakoulis, 2018). Performance measurement of nonprofit organizations serves to legitimize, attract resources, and preserve expectations of stakeholders (Gamble & Beer, 2017). Without meaningful measurements, leaders of nonprofit organizations might be unable to meet the expectations of the stakeholders to secure funding.

A systematic literature review is a comprehensive research method that helps the researcher to identify relevant results of a particular research topic and offers real interest on the research topic (Costa et al., 2018). The researcher uses the literature review as the body of scholarly literature that provides the background and justification for the study and credible evidence to support the research (Ribenfors, 2020). The purpose of this literature review was to provide credible evidence to support the strategies leaders in nonprofit organizations use to identify and implement meaningful measurements to provide evidence of efficient and effective programs and processes to secure funding for their organization's missions. This review of professional and academic literature was organized to include the stakeholder theory as the conceptual framework, augmented with the Juran trilogy model. The stakeholder theory and the Juran trilogy model served as the



foundation for providing leaders of a nonprofit organization with strategies to implement and identify meaningful measurements to sustain funding.

### **Method for Gathering Information**

I conducted this literature review using the following databases: ABI/Inform, Business Source Complete, Emerald Insight, ProQuest Central, SAGE Journals, Science Direct, Google Scholar, EBSCOhost, Thoreau, and Ulrich's Periodicals Directory. Walden University and Google Scholar as my search engines to access these databases and collect other online articles for this study. I used GuideStar, public documents, books, and the client's website and organizational documents to obtain additional information for this study. The search strategy I used for this literature review consisted of accessing the databases using keywords and phrases. I used primary search terms such as *performance management, performance measurements, outcome measurements, nonprofit organization, literature review, stakeholder, nonprofit funding, organizational effectiveness, and trilogy*. A review of the literature using these terms provided additional terms, phrases, and information that supported my research topic.

Walden University's Doctor of Business Administration (DBA) program recommended at least 85% of the referenced academic and scholarly sources for the doctoral study have a publication date within the period of 2015-2020, which was within 5 years of the expected graduation date. To support this study with current scholarly research, I researched 216 sources of which 87% of scholarly resources were published within 5 years of my graduation date and over 96% of the scholarly sources were peer-reviewed.

I organized the literature review into seven focus areas: (a) stakeholder theory, (b) stakeholder theory and business practice, (c) Juran trilogy, (d) other theories considered, (e) nonprofit organizations, (f) performance measurement, and (g) meaningful measurements. The stakeholder theory component consists of a detailed examination of the stakeholder theory, which I selected as the conceptual framework for this study. The second component consists of the stakeholder theory and business practice, which provides detailed information on the application of the stakeholder theory. The third section consists of the Juran trilogy, which I selected to augment the conceptual framework. The fourth section consists of other theories considered, which provides a detailed examination of other theories considered for this study. The fifth section, nonprofit organizations, provides the definition of a nonprofit organization, the role of the nonprofit organization, and how nonprofit organizations obtain funding. The sixth section, performance measurement, consists of a detailed examination of performance measurements. The seventh section, meaningful measurements, consists of identifying key comparative and competitive data and effective processes of benchmarking.

### **Stakeholder Theory**

I used the stakeholder theory as the conceptual framework for this study. I also used the Juran trilogy model to augment the stakeholder theory for this study. Leaders of nonprofit organizations consider the expectations and interests of their stakeholders as a guide in making strategic decisions on their current and future operations. Freeman (1984) said the key objective of a business is to create value for all stakeholders, which are those groups or individuals who can make an impact or be impacted by the business.

Stakeholders might consist of employees, customers, suppliers, governments, credit lenders, special interest groups, and financiers (Schaltegger et al., 2017).

Identifying and implementing meaningful measurements to provide evidence of program and process efficiencies and effectiveness to their stakeholders can enhance the opportunities for the leaders to obtain and sustain funding. Leaders might use the application of the stakeholder theory to manage their business effectively and efficiently (Harrison et al., 2015). The Baldrige Performance Excellence Program (2019) defined organizational customers as users of an organization's products, programs, or services. In addition, stakeholders are defined as all groups that are or might be affected by the organization's actions and success (Baldrige Performance Excellence Program, 2019). Based on the definitions of stakeholders by the stakeholder theory and the definition of customers and stakeholders of the Baldrige Performance Excellence Program, I was able to identify the stakeholders as individuals who used the organization's product and services, donors, and financiers who supported the organization to accurately examine the health of the client organization and address the research question for this study.

The stakeholder theory was an appropriate conceptual lens from which to examine the implementation and identification of measurements for nonprofit organizations. The client organization's goals were to identify and implement meaningful measurements to sustain funding. Freeman (1984) stated stakeholders are individuals connected directly or indirectly with the organization and those who may affect or be affected by the achievement of the organization's objectives, and all stakeholders are customers. Based on the stakeholder theory, the primary stakeholders for the client

organization were the donors who demanded meaningful measurements from the leaders to demonstrate their organizational value to the community. Additional stakeholders who the leaders of the client organization might consider are the beneficiaries of the organization's programs.

The stakeholder theory is a practical, efficient, and effective conceptual lens because all organizations must manage stakeholders by attending to their interests and well-being (Harrison et al., 2015). The principles of the stakeholder theory align with the purpose of the study, which was to explore successful strategies leaders in nonprofit organizations use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions.

According to the stakeholder theory, the goal of the business leaders is to fulfill the interests of the stakeholders (Retolaza et al., 2019). Stakeholders depend on the corporation and other stakeholders to satisfy their interests, and leaders view meeting and exceeding the stakeholders' interests as key to the corporation's ongoing success (Harrison & Wicks, 2013). The organization's stakeholders might be investors, donors, and other groups who expect the organization to demonstrate their value and impact on the industry or community. The stakeholders might be the individual or interest groups who provide financial support for the organization to exist, maintain competitiveness, meet customer requirements, and achieve its mission requirements.

Leaders must be aware of and understand the multiple stakeholders who support their organization's mission and success. Freeman's (1984) fundamental idea that a firm

serves multiple stakeholders indicates the firm's performance might be defined as the total value created by the firm through its activities (Harrison & Wicks, 2013). Leaders might be required to demonstrate and examine the value of the organization to many different groups or individual stakeholders. It is important for leaders to understand the stakeholders' interests and expectations of their organization to gain and maintain the support that might be necessary for their success.

Researchers' evidence has shown the stakeholder theory is about taking care of all stakeholders, which is crucial for the organization's survival (Maso et al., 2018). Leaders might create more value for their organization if they establish meaningful relationships with stakeholders (Bridoux & Stoelhorst, 2016). Stakeholders might be directly or indirectly connected to the organization so leaders should establish a relationship with all stakeholders who have an interest in the organization's success (Maso et al., 2018). By satisfying the needs of the different groups of stakeholders, the business leaders might enhance the organization's financial performance through increased effectiveness and efficiency (Platonova et al., 2018). By ignoring groups of stakeholders, the business leaders might negatively affect their organization's financial performance (Platonova et al., 2018). Leaders might want to establish meaningful relationships with their stakeholders to obtain their support to better serve the organization's customers.

The stakeholder theory indicates the purpose of most companies is to go beyond creating profits and to serve specific customers such as providing customers with products or services to fulfill a need (Schaltegger et al., 2017). The purpose of the stakeholder theory is to allow business leaders to create value and to serve as a

framework that allows joint value creation for stakeholders and the business leaders (Bridoux & Stoelhorst, 2016). The relationship between business leaders and stakeholders is important to the sustainability of the organization. According to the stakeholder theory, business leaders need to consider stakeholder relationships to contribute to sustainable development in a way to create value for the stakeholders, so the stakeholders support the sustainability of the organization (Schaltegger et al., 2017). The relationship between business leaders and the stakeholders is especially important to the success of the business.

Stakeholder theory indicates values are explicitly a part of doing business and the value created by the business brings its core stakeholders together (Freeman et al., 2004). Leaders should consider the importance of stakeholder relationships to ensure they can effectively articulate the created value of their organization. The stakeholder theory reflects and directs how managers operate their business (Freeman et al., 2004).

The main core questions of the stakeholder theory are: (a) what is the purpose of the firm? and (b) what responsibility does management have to stakeholders? (Freeman, 1994). Managers might develop and sustain relationships, inspire their stakeholders, create communities where everyone strives to deliver the value promised, and understand that profits are not the fundamental driver of what they do, but the result of the process is value creation (Freeman et al., 2004). Under the stakeholder theory, leaders understand the significance and importance of their organization's value and that stakeholder relationships are critical components for their continued success. Based on the core questions of the stakeholder theory, leaders are pushed to: (a) articulate how they want to

do business with the stakeholders, (b) determine the kind of relationships they want and need to create value with the stakeholders, (c) move forward to generate outstanding performance as determined by its purpose, and (d) ascertain what brings its core stakeholders together (Freeman et al., 2004).

Stakeholder management is important for leaders to engage stakeholders and effectively and efficiently gain continued stakeholder support for their business.

Stakeholder management is the systematic approach to identify, analyze, and plan actions to communicate with and influence stakeholders, and this is essential in achieving stakeholder satisfaction (Zarewa, 2019). By managing stakeholders, leaders avoid decisions that might result in stakeholders impeding the organization's objectives and help the organization to engage key stakeholders who control crucial resources (Francis et al., 2019). Freeman (1984) indicated strategic management consists of generating and sustaining an organization's competitive advantage, which helps to increase value to stakeholders. Leaders might incorporate a stakeholder framework into their strategic decisions and provide resources to meet the stakeholders' needs to maintain their support in the organization's activities (Freeman, 1984).

Leaders of nonprofit organizations can use stakeholder management to effectively engage stakeholders, which may lead to increased opportunities to obtain and sustain funding for their organization. Stakeholder management is the process leaders use to build and organize relationships with different stakeholders to improve their ability to respond and meet the demands of the stakeholders (Pedrini & Ferri, 2019). Leaders use stakeholder management as a process to sufficiently satisfy the stakeholders' needs for

the benefit of the organization's survival and development (Rusconi, 2019). Therefore, leaders might consider and value the relationships with their stakeholders to obtain and maintain the support that might be crucial for the organization's survival.

Leaders might consider and be aware of the influence stakeholders have to help the leaders achieve their goals such as growth, profitability, and sustainability. Various stakeholders are likely different in their demands of the company and what they offer so relationships with the stakeholders are of significance to the leaders. Based on the different power, influence, and claims that stakeholders have on companies, researchers have identified three approaches leaders might use to effectively manage stakeholders: (a) the descriptive approach, (b) the instrumental approach, and (c) the normative approach (Martinez et al., 2016).

Leaders who focus on stakeholders improve their organizational performance through their improved reputation, increased trust from stakeholders, and stakeholders reciprocating the trust (Gooyert et al., 2017). The instrumental stakeholder theory indicates that business leaders who connect and build relationships with stakeholders based on mutual trust and cooperation will have a competitive advantage over leaders who do not connect with these stakeholders (Jones et al., 2018). The instrumental stakeholder theory refers to the theory that managers who view the interests of multiple stakeholders as having intrinsic worth will achieve higher performance measures (Freeman, 1999). Researchers have asserted that the instrumental stakeholder theory indicates the stakeholder management of the company is a tool to meet specific, traditional organizational goals such as profitability, stability, and growth (Martinez et



al., 2016). According to the instrumental stakeholder theory, businesses are considered instrumental institutions that exist to serve the wealth maximization of their stakeholders (Harrison et al., 2019).

Leaders might consider the importance and benefits of managing stakeholders and stakeholder relationships in the operation and sustainability of their business. The normative theory focuses on why leaders might consider stakeholders' interests (Cesar, 2019). The normative stakeholder theory is concerned with the purpose of the business or why the business exists (Hörisch et al., 2014). Researchers contend the normative stakeholder theory implies the main goal of the company is the management and satisfaction of the stakeholders, with the economic benefits as a secondary priority (Martinez et al., 2016). A key aspect of the normative theory is that the interests of all stakeholders are of intrinsic value (Egels-Zandén & Sandberg, 2010). The foundation of the normative stakeholder theory is that leaders consider stakeholders are essential for their long-term economic growth, but ethical standards come first and are not above the economic interests of the organization unless the company's survival is at stake (Ali, 2017).

Leaders might be aware of the significance of determining the stakeholders' interests to accurately meet the stakeholder demands and requirements to maintain cooperative relationships. The descriptive stakeholder theory is a method used to determine how leaders determine these interests and sufficiently respond to the demands and needs of the stakeholders (Martinez et al., 2016). Based on the descriptive stakeholder theory, leaders focus on relationships with the key or relevant stakeholders

and identify their expectations (Hörisch et al., 2014). The descriptive stakeholder theory is defined by a broad set of different interests that must be balanced and a process that can result in better or worse results. (Martinez et al., 2016). This theory focuses on how organizations actually take stakeholder interests into account (Cesar, 2019).

The stakeholder theory holds the relationship between the company and its stakeholders is based on mutual dependence (Fassin, 2012). The relationship between the company and its stakeholders that is based on cooperation, dialog, alignment of interests, alliances, and collaboration will help the company leaders generate long-term wealth and achieve competitive advantage (Ali, 2017). Stakeholder theory makes companies responsible for their actions to stakeholders, and the company's goal is to create value for all stakeholders (Freeman, 2010).

Researchers have challenged the application of the stakeholder theory in current business operations. The stakeholder theory is based on value creation for stakeholders, so researchers have argued that because every business has always created and destroyed value, the value created for investors is too narrow a focus for leaders to employ to build their company (Freeman et al., 2020). Researchers' evidence indicated profitability is the primary goal of a corporation, which is contradictory to value creation (Laplume et al., 2008).

Researchers have argued the aim of the stakeholder theory is that leaders make decisions based on balancing the interests of the owners and all stakeholders, which causes concern that maximizing profits is not one of the main objectives of the company (Soin, 2018). Bridoux and Vishwanathan (2020) challenged the stakeholder theory by

examining the tensions between powerful stakeholders and leaders. Leaders might desire to focus more attention on the broader group of stakeholders but feel their decisions might be influenced by the demands of the powerful stakeholders. This issue challenges the stakeholder theory of the leader's responsibility to meet the needs of all stakeholders. Leaders might face challenges in meeting the demands of all stakeholders and make decisions based on the power and influence of certain stakeholders.

Researchers have questioned the leader's ability to build trusting relationships to engage stakeholders to participate and contribute to the organization. Alvarez et al. (2020) conducted a study to determine the underlying dynamics of phenomena that play out over time as stakeholders emerge and their contributions become essential to the opportunity formation process. The research was based on how Wakefield Seafoods created a new industry around king crabs but experienced tensions with cocreating value as stakeholders were interested in engaging in a new business with another entrepreneur (Alvarez et al., 2020). Leaders might engage and interact with stakeholders to gain their trust and support to contribute to the organization's success.

Leaders of nonprofit organizations might benefit from establishing trusting relationships with stakeholders, engaging stakeholders in the success of the organization's operations, and determining stakeholder demands and expectations. By engaging the stakeholders and understanding the demands of the stakeholders, leaders can establish strategies to meet the demands of the stakeholders and possibly obtain funding for the organization. Leaders who understand the importance of identifying the stakeholders who can support their organization's success might have a better

opportunity to implement strategies and determine solutions to help achieve organizational success. Leaders use the stakeholder theory to understand the importance of the relationship with stakeholders as it relates to the organization's success. Scholars and leaders use the stakeholder theory to understand the relationships between companies and stakeholders, and the results of those relationships (Jones et al., 2018). The research question for this study related to strategies leaders of nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness. Therefore, the stakeholder theory was appropriate as the conceptual lens through which to view these strategies for this study.

### **Stakeholder Theory and Business Practice**

Business leaders apply the stakeholder theory to their unique business operation to determine and meet stakeholder demands and expectations. Leaders might focus on building relationships to satisfy the needs and demands of the stakeholders to improve the organization's effectiveness and efficiencies (Platonova et al., 2018). An organization might enjoy greater success and long-term viability by creating value for multiple stakeholder groups (Freeman et al., 2010). Leaders might benefit from the type of relationship established with the stakeholders to improve the organization's financial performance and help the organization continue operations to meet the organization's mission (Cordeiro & Tewari, 2015). Stakeholders expect leaders to be accountable, meet stakeholder demands, and manage the success and growth of their business (Kasale et al., 2019).

Stakeholder expectations and demands of nonprofit organizations might be different from stakeholders of a for-profit organization. Stakeholders of nonprofit organizations can be external stakeholders and internal stakeholders. External stakeholders consist of governments, donors, and the community, and internal stakeholders can be volunteers and employees of the organization (France & Tang, 2018). The expectations and demands of internal stakeholders and external stakeholders might be different based on the type of organization. France and Tang (2018) conducted a study to examine the accountability requirements from four different stakeholder groups of a retail store that consisted of: donors, customers of the store, volunteers, and employees. The findings from the 52 responses of the stakeholders indicated: (a) donors and customers required additional information about the retail store's operations than what was presented on their website, (b) volunteers receive more information than required, and (c) the leaders might place more emphasis on donors because they are also customers which mean customer satisfaction is also donor satisfaction (France & Tang, 2018). Stakeholders associated with for-profit organizations expect leaders to be accountable to society and maximize shareholder value (Lehr, 2019). Leaders of nonprofit organizations who understand the demands and expectations of internal and external stakeholders might have a better possibility to meet stakeholder demands that will be beneficial to their organization's success.

Leaders of nonprofit organizations might find it beneficial to understand the different perspectives of stakeholder theory to meet the demands and interests of the stakeholders. Freeman (1984) indicated leaders can use the stakeholder theory from a

managerial perspective and an ethical perspective. The management perspective refers to the organization being managed by the variously identified stakes of the main stakeholder groups (Freeman, 1984). The ethical perspective indicates the performance information needs to be freely available to the persons to whom the organization is accountable which means all stakeholders are to be treated ethically (Herzlinger, 1994). Stakeholders are demanding more information on nonprofit organizations about the organization's financial records, transparency, and accountability methods (France & Regmi, 2019). Therefore, business leaders might establish cooperative relationships with stakeholders to establish and maintain trust and demonstrate they are accountable leaders of the organization.

Nonprofit leaders might focus on the accountability and relationship requirements of multiple stakeholders to ensure all stakeholder demands are met. France and Regmi (2019) conducted a case study to investigate the leaders' accountability towards customers, donors, employees, and volunteers to see stakeholder views. The researchers sent questionnaires to 35 stakeholders to determine the importance the respondents placed on information, the amount of information provided by the nonprofit organization, and a direct question regarding the satisfaction of information provided according to financial, community, shop activities, and fundraising information. Leaders who use the stakeholder theory focus on multiple groups of stakeholders to meet stakeholder demands and create value for their organization (Olsen, 2017). The findings of the study indicated the most important type of information stakeholders demanded was operational, governance, financial, and strategic (France & Regmi, 2019). Donors were more

interested in the operational information and less concerned with fundraising activities for the organization (France & Regmi, 2019). Nonprofit leaders respond to current and new demands of donors to continue to receive benefits such as funding from the established relationship with the donors (AbouAssi & Tschirhart, 2018). The results of the study indicated the amount of information received by donors and customers was less than neutral for governance, financial, and strategic information. The results of this study emphasized the importance for business leaders to develop relationships with stakeholders and understand their demands and expectations to gain support for their business success.

To ensure the long-term health of their organization and support, business leaders might continue to engage their stakeholders. Stakeholder theory indicates the best way to ensure long-term business health is to provide value to the external stakeholders (Hickman & Akdere, 2019). Lochrie (2016) conducted a multiple case study of three United Kingdom World Heritage Sites (WHS) to explore how managers attempt to manage stakeholders and generate involvement and support. World Heritage Sites are cultural and natural sites of outstanding universal value that are important across countries and generations and of international significance (Lochrie, 2016). The application of the stakeholder theory is relevant in this case study because the World Heritage Site management depends on the goodwill of various stakeholders and the stakeholders are potential suppliers of resources such as money, time, commitment, and properties of which stakeholder engagement is very important (Lochrie, 2016).

Leaders who maintain and manage relationships with stakeholders focus on stakeholder interests to help the organization achieve a competitive advantage (Remme & Waal, 2020). The results of the study indicated minimal local community involvement and a lack of cooperation between stakeholders were viewed as a negative outcome for World Heritage Site management (Lochrie, 2016). The results of the study also indicated stakeholder engagement and involvement were necessary for WHS continued success and operations and the importance of stakeholder engagement with WHS cannot be underestimated. The results of the study indicated stakeholder representation must be a part of the WHS management structure and it was especially important for the leaders to establish and maintain personal relationships with their stakeholders (Lochrie, 2016). Nonprofit leaders who engage their stakeholders might have a better opportunity to maintain the health of their organization and achieve the organization's purpose and mission.

Nonprofit leaders might engage stakeholders to achieve organizational success. One of the key elements of the stakeholder theory is leaders build trusting relationships with their stakeholders (Gooyert et al., 2017). Alvarez et al. (2020) conducted a study to explore what happens over time when stakeholders emerge, and their contributions become essential to the opportunity formation process. The study examined the processes of Wakefield Seafoods and the Alaskan king crab industry, focusing on the role of the entrepreneur, in combination with the stakeholders, in the opportunity emergence process (Alvarez et al., 2020). The study consisted of reviewing interviews by key members of the Wakefield Seafood team and stakeholders, transcripts from company meetings,



personal documents, and other archival public documents of the company (Alvarez et al., 2020). The findings of the study indicated the stakeholders were unaware of the outcome of the king crab opportunity or if they would receive a return on their investment (Alvarez et al., 2020). Nonprofit leaders who keep their stakeholders engaged and informed might be able to maximize the long-term market value of their organization (Rusconi, 2019). The findings of the study also indicated the lack of self-interest on the stakeholders was a result of trusting the business leaders that they would be treated fairly by the company. The enrollment of stakeholders and the interaction between the leader and stakeholders made uncertain endeavors successful (Alvarez et al., 2020). Nonprofit leaders might consider building trusting relationships with stakeholders to create value and maintain the support of the stakeholders to benefit the organization.

Business leaders can apply the stakeholder theory in understanding how different stakeholders influence the implementation of performance management. Kasale et al. (2019) conducted a qualitative case study to determine how different stakeholders influence the implementation of performance management among National Sport Organizations. The researchers conducted 31 semistructured interviews and five focus groups targeting 14 Botswana Sport Organizations, using 10 stakeholder categories (Kasale et al., 2019). Stakeholder influence refers to the level of stakeholder involvement in an organization or to the extent the stakeholder might compel others to follow a certain course of action (Eberendu et al., 2017). The findings of the study indicated definitive stakeholders: (a) possess power because they could revoke the affiliation status of the National Sport Organizations, (b) employed usage strategies in the performance

management stages that included processes and activities, performance measurement, feedback and feedforward, and (c) provided funding for the programs and activities so they wanted reports on the initiatives (Eberendu et al., 2017). The application of this study to the business leaders demonstrated how stakeholders might use influence strategies on performance management processes and how important stakeholders might be to an organization's success.

A review of the literature indicated business leaders applies the stakeholder theory to develop strategies to attain a competitive advantage. Leaders apply different business practices to support and meet the stakeholders' demands and expectations. Nonprofit leaders might learn and apply certain business practices to determine the best business practices that may best fit their organization's mission. A review and understanding of the business practices leaders used by applying the stakeholder theory help leaders of nonprofit organizations understand business practices that may be useful for them to develop strategies to identify and implement meaningful measurements to secure funding for their organization.

### **Juran Trilogy**

The Juran trilogy method was used to augment the stakeholder theory for this study. Leaders might use a quality management process to demonstrate to stakeholders their organization's effectiveness. There has been an increasing demand in the nonprofit sector for leaders to focus on results and managing those results to demonstrate the organization's effectiveness (McKernan et al., 2016). Business leaders can apply quality management to demonstrate the effectiveness of their company. A process is considered

effective when inputs are converted to outputs and this transformation process includes quality planning, quality improvement, quality assurance, and quality auditing (Choudhury, 2019). The objective of quality assurance is to assure stakeholders who are not solely responsible for conducting operations know the company is doing well (Juran & Godfrey, 1999). Business leaders can use quality measurements to provide information on their programs' effectiveness and efficiencies to sustain funding for their organization.

Quality management is an important element for business leaders to establish and implement within their company to meet the expectations and demands of stakeholders. Leaders focus on quality because quality delivers competitive advantage and measurable, tangible economic benefits such as reduced costs, better customer satisfaction, improved bottom-line profitability, improved company reputation, and its brand (Bisgaard, 2008). Quality is defined by modern quality management as "fitness for use" which implies leaders develop innovative ways to retain existing and attract new customers with a competitive position in the marketplace or industry (Bisgaard, 2008, p.393). Juran and Godfrey (1999) described "fitness to use" (Bisgaard, 2008, p.393) as meaning that quality evaluates performance for the intended use. Juran (2000) explained leaders attain quality by establishing the vision, goal, and policies of the company. The conversion of those goals into results makes quality happen by using quality planning, quality control, and quality improvement activities to produce the company's intended results.

Nonprofit leaders might use the processes of quality management to meet stakeholder demands and improve organizational performance. Tejaningrum (2019) conducted a qualitative research study using semistructured interviews on 12 small and

medium enterprises (SMEs) in 4 cities in West Java Province, Indonesia to obtain information and data analysis regarding how the Juran trilogy is applied in quality management. Factors such as limited knowledge and skills of SMEs in meeting the desires and expectations of consumers into the quality of technical dimensions, the courage to handle the low risk, and limited mastery of technology hindered the ability of the SMEs to access the market (Tejaningrum, 2019). The findings of the study indicated total quality management was positively related to the performance of SMEs in the manufacturing sector (Tejaningrum, 2019). Nonprofit leaders who understand how to apply quality management processes to their organization might experience increased effectiveness and performance within their organization.

Leaders might use quality management to improve their organizational processes and performance. Mas-Machuca et al. (2020) conducted a mixed methodology approach to explore the relationships between values, values' fit, and quality management with organizational performance, and to investigate the mediating role of knowledge management creation between three antecedents of organizational performance. The researchers indicated quality was one of the main antecedents of organizational performance and quality management was considered one of the requirements for increased performance and sustained innovativeness (Mas-Machuca et al., 2020). Leaders who are committed to continuous improvement, customer satisfaction, and long-term organizational success apply total quality management processes within their organization (Peljhan & Marc, 2018). The results of the findings indicated quality management and knowledge creation had a significant and positive impact on

organizational performance. Stakeholders are identifying themselves more with the value of the organization so quality measurement is essential to help manage those organizational values (Mas-Machuca et al., 2020). Leaders might apply quality management processes within their organization to help meet the demands of the stakeholders and improve the effectiveness and performance of the organization.

Juran trilogy organizes quality management in three equally important functions: (a) quality planning, (b) quality control, and (c) quality improvement (Bisognano, 2004). Quality planning is about business leaders building quality in the process from the start, designing products, services, and processes that meet customers' expectations and optimizing performance (Teixeira et al., 2015). Quality control is about ensuring the company meets its established goals by maintaining the performance of the processes (Bisognano, 2004). Quality improvement refers to changing a process to improve its performance by reducing deficiencies (Teixeira et al., 2015). Combining the stakeholder theory and Juran trilogy is an appropriate conceptual lens from which to explore the implementation and identification of measurements for nonprofit organizations.

### **Other Theories Considered**

I considered other business-related theories before I selected the stakeholder theory as the conceptual framework for my study. The theories reviewed included: (a) shareholder theory, (b) agency theory, and (c) the resource-based view theory. After I researched the theories, I decided the theories were not appropriate based on the business problem and research question of the study. I have included the details of the theories and

the reason why the theories were not appropriate as the conceptual framework for the study.

### ***Shareholder Theory***

The shareholder theory contrasts with the stakeholder theory. The shareholder theory, developed by Milton Friedman in 1970, argued a corporation's only objective is to profit and the role of the managers is to maximize shareholder wealth (How et al., 2019). The premise of the shareholder theory is that corporations and manager's primary purpose are to promote shareholders' financial interests and to support the interests of others only if doing so benefits the shareholders' interests (Hughes, 2019).

The shareholder theory has been referred to as the framework that contends managers are agents of shareholders (Mejia, 2019). Friedman (1970) asserted managers are employed as agents of the corporation and the responsibility of the managers is to manage the assets of the shareholders to maximize shareholder returns. Friedman argued that managers are agents of the company's owners and their moral responsibility is to maximize profits and their moral obligation to stakeholder groups is limited (Rodin, 2005). Under the shareholder theory, business leaders might be liable for a breach of fiduciary duty if they fail to pursue the interests of the shareholders (Stern, 2018).

The shareholder theory directly conflicts with the stakeholder theory. The shareholder theory perspective is for the business leaders to maximize wealth for the shareholders, which leads to higher wealth (Paul et al., 2020). Researchers argue the stakeholder theory relates to stakeholder value creation and the organization's objective is to meet the stakeholders' social, environmental, and profit demands and expectations

(How et al., 2019). The client organization's goal is to identify and implement meaningful measurements to sustain funding to allow the organization to benefit the stakeholders within the community. I did not use select the shareholder theory as the conceptual framework for this study because the purpose of this organization is not to maximize profits to benefit shareholders.

### ***Agency Theory***

Agency theory is concerned with situations of which one individual (the agent) acts on behalf of another (the principal) and is supposed to advance the principal's goals (Milgrom & Roberts, 1992). Researchers contend the agency theory implies the leaders or owners of an organization establishes relationships with individuals to receive value creation in return (Bosse & Phillips, 2016). Jensen and Meckling (1976) defined the agency relationship as a contract of which one or more persons (principal) engage another person (agent) to perform some service on their behalf that involves delegating some work and decision-making authority to the agent. In a company, the shareholder is the principal, and the manager is the agent.

Leaders might use the agency theory to explain their relationship with their shareholders. The agency theory considers the company is at the center of the agency relationships and is presented as an organization of contracts between shareholders and managers (Sharma & Gupta, 2019). The agency theory assumes managers are self-interested maximizers who are motivated only by monetary incentives (Till & Yount, 2019). Each agency relationship is a unit of analysis that might include individuals of

different motives and goals (Sharma & Gupta, 2019). The leader's relationship with their shareholders could have a positive or negative impact on the success of the company.

Leaders might experience conflicts with stakeholders which could lead to the leaders' inability to meet the demands and expectations of the stakeholders. Under the agency theory, the manager acquires legal and economic obligations towards the shareholders and the company is no longer a separate organization, but a myriad of complex relationships among several individuals (Fontrodona & Sison, 2006). Some of the concerns of the agency theory are: (a) the goals of the shareholder and the managers may diverge, (b) the attitudes of the shareholders and managers may differ toward types and level of risks, (c) it is difficult for the shareholder to monitor the manager's performance, (d) managers may behave opportunistically, (e) and the managers may not be responsible in performing their duties according to the best interests of the shareholders (Lamont et al., 2018). Leaders who apply the agency theory might not align with the interests of the stakeholders that can lead to no or decreased support from the stakeholders.

The agency theory presents challenges of business leaders being willing or able to represent the interests of the shareholders. The business leaders might face challenges in being aligned with the shareholders on goals, risk awareness or assessment, and other leadership decisions. The stakeholder theory focuses on those interests and stakeholders who affect or are affected by the company (Freeman, 1984). The agency theory does not consider nonshareholder stakeholders who might have the influence, power, and interest



to ensure the company is successful. Based on the principles of the agency theory, the agency theory was not an appropriate conceptual framework for this study.

### ***Resource-Based View Theory***

In the 1980s, Birger Wernerfelt and Jay Barney introduced the resource-based view (RBV) theory as one of the theories of strategic management to inform business leaders on how companies might achieve sustainable competitive advantage by using their resources (Nagano, 2020). RBV theory argues a company will sustain competitive advantage if the leaders leverage internal resources to guard against competitors and other external market forces that might negatively impact performance (Porter, 1980). To gain a competitive advantage, business leaders use the resource-based view theory to determine the best strategies to employ their internal resources as capabilities for their company. The RBV theory views the company as a system of company resources controlled by the company such as capabilities, information, knowledge, technology, and individuals that create value when effectively utilized (Bayer et al., 2019).

The RBV theory indicates the resources and capabilities of the company are the primary sources for the company's profitability (Nagano, 2020). Business leaders use the RBV theory to determine how to use essential resources to meet their company's strategic objectives, create and sustain competitive advantage, enhance performance, and achieve profitability (Chahal et al., 2019). Under the RBV theory, the company's resources are considered capabilities that create value when the company properly employs those resources (Bayer et al., 2019). Business leaders who utilize their strategic resources might have sustained a competitive advantage over other competitors who do

not have sufficient resources or who do not effectively employ their resources within their company (Chahal et al., 2019).

The RBV theory is based on business leaders utilizing the internal resources of their company to achieve a competitive advantage. Researchers maintain the RBV theory indicates the effectiveness and efficiency of the company are based on the use of its resources (Hamdoun, 2020). The client organization's resources are stakeholders who the company will provide strategies to identify and implement meaningful measurements to sustain funding. The RBV theory is based on the use of internal resources, which is not appropriate for this study.

#### ***Five Competitive Forces Theory***

The five competitive forces theory indicates the business environment consists of five competitive forces that require analysis which is: (a) the bargaining power of suppliers, (b) the threat of entrants or potential competitors, (c) the threat of substitute products or services, (d) the bargaining power of buyers or potential customers, and (e) the intensity of the rivalry among existing competitors (Rachapila & Jansirisak, 2013). Porter (1980) advised that business leaders would be able to achieve and maintain profitability if the business leaders focused on the strategies of cost leadership, differentiation, and focus to defeat the competitive forces. Cost leadership concerns the efficiency and high volume, differentiation refers to innovation, and focus is about focusing on a particular market that might include cost leadership, differentiation, or both (Snider & Davies, 2018).

Researchers asserted the five competitive forces theory means the success of a company's competitive strategy is based on the company's ability to defend itself against competitive forces and how they are positioned within their business environment (Mathooko & Ogutu, 2015). The pressures of the competitive forces help the business leaders highlight their strengths and weaknesses and a reason for the leaders to evaluate their position in the industry (Gnjidić, 2018). Porter (1980) suggested that competitive force is the basic structure of the company, and the company is responsible for establishing a position within the industry to be able to defend and influence forces for their benefit (Watanabe et al., 2018). The five competitive forces theory was not related to the client organization's purpose to provide meaningful measurements to stakeholders to sustain funding, so I did not select this theory as an appropriate conceptual framework for this study.

### **Nonprofit Organizations**

Many people describe a nonprofit organization as an organization that received tax-exempt status. Congress has designated tax-exempt organizations in different sections of the tax code which are: (a) Section 501(c)(4) includes social welfare organizations, homeowner's associations and volunteer fire companies, (b) Section 501(c)(5) includes labor unions, (c) Section 501(c)(6) includes chambers of commerce, (d) Section 501(c)(3) includes public charities known as charitable profits, churches and religious organizations known as public charities, and private foundations, and (e) Section 501(k) includes child care organizations (Exempt Purposes-Internal Revenue Code section 501(c)(3)., 2019). The common factor for the nonprofit organization is that no part of the organization's

earnings is for the benefit of any private shareholder or individual, which helps better define the organization as nonprofit (National Council of Nonprofits, 2019).

The 501(c)(3) is the most common type of nonprofit that consists of organizations engaged in charitable, educational, literary, animal welfare, child welfare, public safety, religious, scientific, and other specific purposes (Friesenhahn, 2016). Under Exempt Purposes-Internal Revenue Code section 501(c)(3) (2019), nonprofit organizations: (a) may not participate in campaign activity for or against political candidates, (b) may not attempt to influence legislation as a major part of their activities, (c) must not be organized or operated for the benefit of private interests, and (d) restricted on the amount of engagement in political and legislative (lobbying) activities. The nonprofit organization is granted its tax-exempt status by the Internal Revenue Service and will maintain that status until the life of the organization unless the organization does not adhere to the provisions of its exemption (Friesenhahn, 2016). The client organization, the nonprofit organization for this study, is a nonprofit organization with the 501(c)(3) tax-exempt status.

A nonprofit organization is a tax-exempt organization that benefits the public interest (Independent Sector, 2018). Nonprofit organizations represent many causes and might consist of a diverse group of individuals. Nonprofit organizations operate under a mission statement that helps the business leaders to formulate their goals and functions of the organization (Samimi, 2012). Nonprofit organizations are self-governed, which means they are legally required to be governed by a board of directors (Witesman, 2016). Nonprofit organizations provide a public benefit by providing goods and services to

populations that have been neglected or underserved by other private and public organizations (Witesman, 2016). Nonprofits are different from corporations in that they solicit their funds from donors, not earned, and they meet the need that serves the public good (Exempt Purposes-Internal Revenue Code section 501(c)(3)., 2019).

Like private and public sectors, leaders of nonprofit organizations use performance measurement systems because funders are requiring extensive monitoring and reporting of performance information, and performance measurement systems focus on outcomes to achieve desirable goals aligned with the organization's mission (Knox & Wang, 2016). Donors for nonprofit organizations, like investors for public companies, pressure business leaders of nonprofit organizations to produce performance outcome reports before selecting nonprofit organizations to support (Kim et al., 2019). Leaders of nonprofit organizations aim to achieve outcomes for their beneficiaries to inform them of their service improvement and accountability (Yang & Northcott, 2019). Leaders use performance measurement is an essential element of nonprofit organizations and to preserve the expectations of stakeholders (Gamble & Beer, 2017). Leaders might use performance measurement to demonstrate their organization's effectiveness, enhance the meaningfulness of outcome measures, support performance improvement, and provide stakeholders with data to facilitate funding (Yang & Northcott, 2019).

A nonprofit organization in the mid-Atlantic region was used for this study. The organization provides services such as education, leadership development, and job skills in schools, communities, and hospitals. The leaders of the organization provide services without the intent or goal to obtain a profit. Nonprofit leaders might want to understand

the business implications of a nonprofit organization and performance measures to demonstrate the organization's effectiveness and efficiencies to stakeholders.

### **Performance Measurement**

Leaders might use performance measurements to demonstrate the organization's effectiveness and efficiencies to meet the demands and expectations of stakeholders. The main objective of any organization is to be successful, which business leaders accomplish by achieving higher levels of organizational performance (Mas-Machuca et al., 2020). Business leaders use performance management to legitimize, attract resources, and meet the expectations of stakeholders (Gamble & Beer, 2017). Performance management provides a framework for business leaders to use to inform stakeholders of the status and value of their organization (Smith & Bititci, 2017). The demand and requirement for business leaders of nonprofit organizations to measure performance has increased because the business leaders are being held accountable to stakeholders such as governments, donors, and communities (Velli & Sirakoulis, 2018). Performance measurement is the process of business leaders setting goals, developing performance measures, and reviewing and acting on that data to improve the performance and value of the organization (Smith & Bititci, 2017).

Business leaders can use performance management as a resource to inform the stakeholders about the company's performance to increase stakeholder cooperation, increase the relationship building with the stakeholders, and provide an opportunity to create mutual interests (Hörisch et al., 2014). Performance management is the process for business leaders to quantify the efficiency and effectiveness of their organizational

actions and might be defined with overlapping terms and meanings such as: (a) performance measure, (b) metric, (c) performance indicator, key performance indicator (KPI), key result indicator (KRI), critical success factor (CSF), and lead indicator (Star et al., 2016).

Nonprofit leaders might use performance measurement to inform stakeholders of the organization's success, effective and efficient programs and processes, and potential for continued success. The leaders of the nonprofit organization for this study might identify and implement performance measurements to meet the demands and expectations of the stakeholders. The leaders might also use performance measurements to demonstrate their ability to remain competitive and support the need to obtain funding from stakeholders to support the organization's mission.

### ***Key Performance Indicators***

Nonprofit leaders might use key performance indicators to explain the effectiveness of the organization's programs and processes. Key performance indicators are quantifiable task-specific metrics business leaders use to measure the effectiveness of their organization's operations (Haber & Schryver, 2019). Stakeholders and business leaders receive valuable insights into the company's health, performance, and value by reviewing the information from the key performance indicators that are understandable, measurable, and meaningful (Kuhfahl et al., 2018). Stakeholder groups such as donors, lenders, watchdog organizations, and customers may view the progress of the nonprofit organization from different perspectives, so business leaders might decide to develop different key performance indicators based on the stakeholders' requirements (Haber &

Schryver, 2019). Nonprofit leaders can engage the stakeholder groups to identify meaningful measurements to meet the demands and expectations of the stakeholders.

Leaders might use key performance indicators to continually evaluate the progress of the organization's processes. Amzat (2017) conducted a quantitative study to create a key performance indicator that could be used as a benchmark tool for teaching performance and practices of both excellent teachers and teachers who were not excellent and to investigate the possible interrelationships between the five different thinking domains. Business leaders use key indicators to measure organizational performance (Stricker et al., 2017). The sample consisted of 306 excellent teachers from eight states within Malaysia. The knowledge is power program model was used for the research, which consisted of four elements for excellent teachers: (a) self and others, (b) knowledge, (c) the teaching cycle, and (d) classroom culture (Amzat, 2017). Amzat used the key performance indicators such as quality of instruction, teacher classroom behavior or classroom context, connecting instruction objectives and evaluations, and classroom management for students' motivation.

In this study, the key performance indicators were assessed and determined using the excellent teacher domains. The findings of the study indicated continuous key performance indicators were necessary to evaluate the effectiveness of the excellent teachers for teacher performance. Based on this study, business leaders used key performance indicators to continuously evaluate the current performance of the organizational processes, expectations, and requirements. Leaders might use continuous



key performance indicators to identify and evaluate the effectiveness and efficiencies of the organization's programs and processes.

Business leaders might use key performance indicators to contribute to the organization's success. Thornton et al. (2020) conducted a study to examine the relationship between perceived cohesion and key performance indicators in education. Higher education institutions used key performance indicators such as student retention, success, achievement, and attendance (Thornton et al., 2020). Leaders use key performance indicators in education to benefit higher education stakeholders and policy (Varouchas et al., 2018). The study consisted of 107 first-year sports students from seven higher education programs of three colleges in the North East of England. The findings of this study indicated the teachers must have students in attendance to improve their performance indicators. The findings also indicated cohesion combined with the key performance indicators might have resulted in higher success rates and greater satisfaction with the higher education programs. Based on this study, key performance indicators might help business leaders determine additional performance measurements to meet their organizational objectives.

Leaders of higher education institutions used key performance indicators to monitor and control the performance of their performance and processes and provide relevant information to stakeholders, administrators, and stakeholders about the institution's achievements and progress (Mati, 2018). Historically, education is key to improving the lives of the success of people, so leaders identify measurements that provide detailed information on the progress of the institution's programs (Amzat, 2017).

Mati (2018) conducted a study to examine various national and international accreditation standards and to determine their requirements for key performance indicators to monitor input resources. The leaders also used the key performance indicators for benchmarking purposes by comparing the institution's performance against other comparable institutions (Mati, 2018).

The study consisted of key performance indicators identified in the categories of human resources, physical resources, and financial resources. In the study, some of the key performance indicators to track and analyze the value chain that students followed from the application process to graduation consisted of: (a) variety of applicants, (b) admission scores, (c) number of applicants, (d) student engagement, and (e) student satisfaction (Mati, 2018). Mati used surveys that included questions about the organization and management, teaching quality, learning resources, academic and non-academic supports, and personal development. Mati (2018) also used community service expenditure which was the amount of money used to provide services in the local community. This indicator was one of the linking quantitative measurements to the external stakeholders (Mati, 2018). Business leaders might use these key performance indicators of this study to determine and measure their impact on the number of graduates from higher education institutions or any other organization that provide education services.

Business leaders can use key performance indicators as meaningful measurements to provide relevant and clear information to stakeholders to sustain funding. Leaders might use key performance indicators to identify information such as changing trends in

customer preferences and improvements required for the organization's success (Bourne et al., 2018). Key performance indicators are the set of measures business leaders use to help them focus on the most critical elements of the organization for the organization's current and future success (Star et al., 2016). Star et al. (2016) asserted key performance indicators help the leaders focus on resources and processes that lead to successful organizational outcomes. Business leaders use key performance indicators to determine what they need to do to highly improve organizational performance (Tewari et al., 2018).

To effectively identify and implement key performance indicators, researchers have presented evidence that has shown performance indicators are specific, measurable, achievable, relevant, and time phased. Business leaders use the acronym, SMART, as the abbreviation for specific, measurable, achievable, relevant, and time phased. Kuhfahl et al. (2018) suggested key performance indicators might: (a) be specific in having a specific purpose for the business, (b) be measurable, (c) include achievable objectives, (d) include relevant measures that align with the success of the organization, and (e) consist of objectives that are measured based on a predefined, relevant, and specific time periods that are necessary to help business leaders meet their organizational goals. Business leaders might use the SMART criteria to determine if the indicators are relevant to the organization's success and continued operations.

### ***Key Result Indicators***

Leaders might use key result indicators to demonstrate the organization's performance to meet the demands and expectations of stakeholders. Key result indicators are measures business leaders use to determine how well the organization has performed

and the specific activities accomplished (Star et al., 2016). Business leaders use key result indicators to determine how the organization has achieved in a perspective and what has been accomplished (Tewari et al., 2018). Business leaders use key result indicators to help them determine the vision of where the organization is going and if they are going in the right direction (Star et al., 2016). Business leaders use result indicators to summarize an organization's activities and financial performance measures.

Leaders might use key result indicators to inform stakeholders of the effective and quality activities being conducted to meet the organization's mission. Arcos-Vega et al. (2017) conducted a study on information and communication technologies and their relationship with indicators of academic results in bachelor's degree programs offered in-state public universities. Business leaders might not have the correct performance measures to evaluate their organization's processes (Tewari et al., 2018). The results indicators for the state public universities in Mexico were associated with withholding rates, professional integration, completion rates, graduation rates, and graduates and employer satisfaction (Arcos-Vega et al., 2017). The findings of the study indicated the implementation of information and communication technologies affected how satisfied the students and graduates were with the degree programs of the universities. The result indicators provided relevant information about the quality of the degree program for the university. Business leaders might use key results indicators to determine relevant information about the quality and the effectiveness and efficiency of its organizational processes and programs.

### ***Critical Success Factors***

Nonprofit leaders can use critical success factors to identify activities that are required to continue their business operations. For the nonprofit sector, the contemporary definition of critical success factors might be defined as the components that allow the organization to meet and achieve its criteria or accreditation as a nonprofit organization as defined by the government (Strang, 2018). Hietschold et al. (2014) described critical success factors are the best practices or enablers that drive an organization's success. Business leaders of nonprofit organizations understand critical success factors are those competencies that are required for businesses to succeed (Strang, 2018). Business leaders might identify and mitigate the risk for failure of critical success factors to ensure the success of their business and the effectiveness and efficiency of their organizational processes.

Business leaders might want to identify critical success factors to be able to inform stakeholders of the important activities required to continue business operations. Almutairi and Albraithen (2018) conducted a study to review the current literature on the factors affecting the successful implementation of virtual schools and the critical success factors required for institutions to implement virtual schools. Almutairi and Albraithen (2018) indicated the failure of virtual learning was due to the leaders' failure to identify key factors affecting implementation and the leader's lack of knowledge of important requirements that led to the failure to prioritize resources and actions. Leaders should identify critical success factors because they have a significant impact on the organization's success (Ghanbaripour et al., 2020). According to the study, the

implementation of the virtual schools depended on key stakeholders who impact or are affected by the effective implementation of the virtual school. Some of the 15 key critical success factors were: (a) system quality, (b) content quality, (c) student's self-efficacy, (d) usefulness, (e) course flexibility, and (f) ease of use (Almutairi & Albraithen, 2018). The findings of the study indicated technology was the core enabler of the virtual school initiatives and the program offered a variety of evaluation methods to assess the student's learning. Business leaders who identify critical success factors for their organization can provide relevant information to stakeholders on the requirements necessary to sustain their business and the organization's core enablers to sustain funding.

Business leaders might use performance measurements to meet the demands and expectations of the stakeholders and inform stakeholders of the organization's performance. Business leaders utilize key performance indicators, key result indicators, and critical success factors to determine the health and performance of their organization (Tewari et al., 2018). Key performance indicators and key result indicators provide a framework for business leaders to periodically assess the organization's performance on a daily, weekly, monthly, quarterly, and annual basis (Kuhfahl et al., 2018). Business leaders develop and implement key performance indicators and key result indicators to help them achieve the organization's vision, mission, and goals (Tewari et al., 2018). Business leaders might use key performance indicators, key result indicators, and critical success factors as resources to identify meaningful measurements on the effectiveness and efficiencies of their organization's processes and programs to sustain funding from stakeholders.

### *Implementing a Performance Measurement System*

Nonprofit leaders might use a performance measurement system as a tool to provide performance information to stakeholders to obtain support for business operations. Business leaders implement performance management systems as a workforce tool to measure and manage employee performance and make it meaningful to their business (Devarajan et al., 2016). Business leaders might implement a performance measurement framework that is owner focused, highly flexible, fast fit to market changes, less formalized processes, and focused on the daily business of the organization (Pekkola et al., 2016). Business leaders might develop an implementation strategy that is appropriate for their organization.

Nonprofit leaders might implement a performance measurement system to improve the organization's results. Hurdubei and Profirou (2019) conducted a case study about a company that designed and implemented a performance management system for a large, multicultural telecommunications company in the Middle East. Based on the study, the company approached the development of the performance measurement system by: (a) data collection that consisted of gathering data from the stakeholder interviews, focus groups and employee surveys, and organization data, (b) analysis that consisted of analyzing the stakeholders' expectations and benchmarking against best practices, and (c) recommendations which consisted of a rating scale core competencies and rewards. Leaders who use a performance measurement system might use performance measurements to develop strategies to achieve success (Liang & Gao, 2020). The performance framework for the study consisted of the leaders applying a four-

point rating scale, an appraisal of objectives and behavioral competencies and a performance management system based on: (a) setting objectives, (b) mid-year review, (c) end of the year review, and (d) calibration and validation (Hurdubei & Profirou, 2019). Based on the results of the study, the implementation of the performance management framework had a significant impact on the organization and the results of the items measured. Nonprofit leaders might use a performance measurement system to demonstrate the organization's improved results and meet the demands and expectations of stakeholders to help achieve the organization's mission.

Business leaders might face challenges in the implementation of a performance management system because of the resources needed and the required time to effectively implement the system. Business leaders might utilize techniques and leadership styles that work and help them to engage employees and communicate well with employees on the performance measurement system for the organization (Ohemeng et al., 2018). Implementing a performance management system to enhance an organization's efficiency and effectiveness is important for business leaders. Nonprofit leaders might use the performance measurement system to improve their identification of meaningful measurements, the effectiveness, and efficiencies of the organization's programs and processes, and meet the demands and expectations of the stakeholders.

### **Meaningful Measurements**

Leaders might use meaningful measurements to provide stakeholders with information that identifies their organizational success. Meaningful measurements such as performance measurements help leaders to improve their operations and meet the



needs and interests of their stakeholders (Lee & Clerkin, 2017). Leaders might identify and select performance measurements based on what is acceptable by them for accountability, legitimacy, organizational efficiency, and effectiveness purposes (Moura et al., 2019). Leaders also might base their decision to select performance measurements that are most important to their organization's success (Prentiss, 2016). Leaders might identify meaningful measurements to help the organization continue operations and achieve the organization's mission.

After leaders have implemented meaningful measurements in their organization, it is important for leaders to compare key comparative and competitive data from other organizations to determine if their measurements are effective. Leaders of well-managed nonprofit organizations might gauge their organization's effectiveness by comparing their measurement results to similar organizations or their own organization's history (Haber & Schryver, 2019). By comparing this data, leaders might gain the opportunity to identify meaningful measurements employed in other organizations with high levels of performance. Leaders identify key comparative and competitive measurement data to establish measures for which the organization can achieve goals (Yaseen et al., 2018). Leaders might also obtain an external perspective on their organization's performance and establish performance benchmarks by reviewing comparative and competitive measurement data from competitive companies.

Benchmarking is the process of comparing an organization's activities processes, or methods with other companies (Erdil & Erbiyik, 2019). Leaders use benchmarking as a tool to improve or achieve superior organizational performance by: (a) identifying and

using best practices from other organizations, (b) exposing competitive organizations' internal activities, (c) comparing operational strengths and weaknesses of organizations, and (d) learning from leaders of other organizations that have demonstrated excellence (Yaseen et al., 2018). Leaders use benchmarking as a continuous quality improvement process to: (a) help evaluate comparative advantages of the best and leading competitors, (b) identify key processes that require improvement, (c) identify the highest standards of excellence, and (d) help set goals necessary to achieve competitive advantage (Sweis et al., 2015).

The research question that served as the foundation of this study and the literature review is relative to the strategies nonprofit leaders use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. By using the application of the stakeholder theory as using it as a lens for this study, the client organization must develop a strategic plan to meet the needs and demands of all stakeholders. The use of the stakeholder theory supports the identification and implementation of meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's mission. The qualitative single case study design was appropriate to explore the strategies used by the leaders of one nonprofit organization trying to develop and implement strategies to identify and implement meaningful measurements to sustain funding.

## **Transition**

In Section 1, I provided a detailed explanation of the foundation of the study. This section consists of a substantial review of literature on strategies nonprofit organizational leaders might use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness. The literature review also contains information on the stakeholder theory as the conceptual framework and the augmentation of the Juran trilogy model that was used to complete the study. Other topics covered in the literature consisted of the information on the different types and importance of nonprofit organizations, performance measurements that can be used by nonprofit leaders, and information on how leaders might implement a performance measurement system. Nonprofit leaders who use the stakeholder theory to develop strategies to identify and implement meaningful measurements might be able to sustain funding for the organization's missions.

Section 2 consists of the study's purpose that explains why I selected the qualitative single case study to explore strategies nonprofit leaders use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness. This section also contains the details of my role as the researcher and how I will be ethically responsible for collecting, organizing, and analyzing data.

In Section 3, I provide a detailed explanation of the application of the Baldrige Performance Excellence Program to discuss the client organization. I interviewed the participants to collect data for this research study. In this section, I provide a summary of

key themes, the findings of the study, and contributions and recommendations for future research. I also include the client's organizational profile, by exploring the components of the Baldrige Framework which are: (a) leadership, (b) strategy, (c) customers, (d) measurement, analysis, and knowledge management, (e) workforce, (f) operations, and (g) results.

## Section 2: The Project

Section 2 is the presentation of the project, which consists of the purpose statement, role of the researcher, the description of the participants involved in the study, the details of the research method and research design, and the population and sampling. Section 2 also consists of the data collection instruments and the data collection and data analysis process I used to ensure data reliability and validity to answer the research question:

RQ: What strategies do leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions?

### **Purpose Statement**

The purpose of this qualitative single case study was to explore successful strategies leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. The target population consisted of leaders of a nonprofit organization in the mid-Atlantic region who had experience in using strategies to sustain funding for the organization. The implications for positive change are that perusing, implementing, or modifying the findings might enable nonprofit leaders to develop strategies to identify meaningful measurements that demonstrate the efficiency and effectiveness of programs and identify the derivative implications for effecting general beneficial change.

### **Role of the Researcher**

Researchers play a major role in developing research studies by collecting and analyzing data and conducting a literature review to better understand the research topic. In qualitative research, the role of the researcher is to serve as the primary instrument of data collection and analysis (Karagiozis, 2018). Therefore, I performed the duties as the instrument of data collection and analysis. The research was a study exploring strategies that leaders in a nonprofit organization use to identify and implement meaningful measurements to provide evidence of efficient and effective programs and processes to secure funding for their organization's mission. As the researcher of this study, my goal was to gather information about the topic. I had no prior professional or personal relationships with the client nonprofit organization or the participants included in this study.

As the primary instrument of data collection and analysis for this study, I followed the *Belmont Report* (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1978) to help ensure I maintained ethical standards involving human participants of this study. According to the *Belmont Report*, respect for persons, beneficence, and justice are three basic principles researchers use to maintain ethical standards when conducting research involving human subjects (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1978). Also, Walden University requires researchers to obtain an IRB approval before collecting data for the doctoral study (Walden University, 2016). I treated each participant ethically and complied with Walden University's IRB

requirements. I obtained IRB approval before I began contact with my client and the data collection process. I also received signed consent from each participant of the study confirming their understanding of the purpose of the study, the voluntary nature of the study, and the extent of the study.

To begin the data collection process, I reviewed information on the client's website, public websites such as GuideStar, and documents provided by the nonprofit organization leaders. Also, I developed interview questions that aligned with my research topic on strategies leaders use to identify and implement meaningful measurements to provide evidence of efficient and effective programs and processes to secure funding for nonprofit organizations' missions.

Bias management is one of the major challenges for qualitative researchers who use interviewing as a data collection method (Chenail, 2011). Researcher bias in qualitative research may cause the researcher to misinterpret the true experiences of participants and may lead to alteration of the authentic representation of the participant's experience (Wadams & Park, 2018). Researchers use member checking as a validation technique to explore the credibility of the results and mitigate researcher bias by allowing the participants to check and confirm the results (Birt et al., 2016). To mitigate bias and avoid viewing data from a personal perspective, I used member checking and an interview protocol (see Appendix).

Semistructured interviews are in-depth interviews that consist of open-ended questions and a few closed questions (Raselekoane et al., 2019). Semistructured interviews allow the interviewees to freely express their ideas, which helps the researcher

to obtain rich and direct information (Yueyao et al., 2019). An interview protocol is crucial to obtaining qualitative data and helps the researcher to facilitate the interview process systematically and consistently to obtain comprehensive information within an allocated time (Yeong et al., 2018). I conducted semistructured interviews by telephone as the primary means of collecting data from the participants and used open-ended questions aligned with the Baldrige Excellence Framework and the research question of this study.

### **Participants**

Researchers expect the participants to be representative of the characteristics of the population for whom the findings are intended to represent (Peck et al., 2020). The eligibility criteria used for this study were the nonprofit senior leaders of the organization chosen to participate in the doctoral study. The participants involved in this case study represented the leadership of the nonprofit organization and provided invaluable information for this doctoral study. Based on the Walden University IRB requirements, the participants had to meet specific requirements, voluntarily participate in the study, and sign a consent form (Walden University, 2017). The selection of senior business leaders for this study provided different perspectives on the strengths, weaknesses, and opportunities for the organization.

My doctoral chair provided initial introductions to allow me to gain access to the participants. I contacted my client leader by email to schedule specific dates and times to conduct conference calls and obtain organizational documents. Based on the requirement for the Walden University DBA program, I informed the nonprofit client leader of my



IRB approval and the corresponding number. The nonprofit client leader permitted me to gain access to the other senior leaders, and I used emails and conference calls to communicate with the participants.

Researcher and client relationships are fundamental to research and may contribute to how researchers interact with their participants, which may impact the quality and depth of the research (Pinnegar & Quiles-Fernandez, 2018). The relationship that exists between the researcher and their participants is crucial and has a significant impact on the management of the research and the outcome of the research (Thurairajah, 2019). To establish and maintain a working relationship with the participants, I conducted biweekly conference calls, maintained communication via emails, and conducted a series of open-ended questions (see Appendix). I complied with the *Belmont Report* principles, IRB preapproval data sources, and the DBA research agreement during the doctoral research process.

The participants' characteristics aligned with the overarching research question. The participants interviewed had various backgrounds and experiences and used successful strategies to identify meaningful measurements for nonprofit organizations. In qualitative research, researchers use research questions to explore phenomenon through the experiences and personal stories of the participants (Howard et al., 2016). Each member of the organization was experienced in leadership and provided key leadership activities to ensure the success of the nonprofit organization.

## **Research Method and Design**

### **Research Method**

I used the qualitative research method to explore strategies nonprofit leaders used to identify and implement meaningful measurements to provide evidence of efficient and effective programs and processes to secure funding for a nonprofit organization's mission. In a qualitative research design, researchers collect and analyze data on a phenomenon that may be significant, relevant, and warrants exploration, description, and understanding (Cypress, 2018). The researcher using a qualitative method focuses on applied and theoretical findings to explore descriptive accounts and similarities and differences of various social events (Park & Park, 2016). Researchers have used the qualitative method to help them understand how things are and may consist of individual and focus group interviews and participant observations. (Hamilton & Finley, 2020). In this study, I explored the processes used by the participants and the participants' experiences related to identifying meaningful measurement strategies; therefore, the qualitative method was appropriate for this study. Through a qualitative method, researchers explore and understand the meaning that individuals and groups assign to their lived experiences (Christenson & Guterrez, 2016). A qualitative methodology was suitable for this study because the goal of this study was to explore the lived experiences of the participants and provide strategies used to identify and implement meaningful measurements to secure funding for a nonprofit organization's mission.

In a quantitative research method, researchers use hypothesis testing to achieve the research goals and emphasize numerical data and measurable variables (Park & Park,

2016). With quantitative methods, the researcher tests conceptual models and understand the relationships between variables and uses established measures or assessments to quantify a participant's thoughts, emotions, and behaviors for use in statistical analysis (Christenson & Guitierrez, 2016). In a quantitative research method, the hypothesis must be verified or falsified based on empirical analysis, and the researcher uses tested and statistically validated instruments to conduct the study (House, 2018). I did not use a quantitative method for this study because I did not test a hypothesis.

In a mixed methods research approach, researchers collect and analyze data, integrate the findings, and draw inferences using both qualitative and quantitative methods to research a problem in a single study (Türkoğlu, 2019). In a mixed methods approach, the researcher integrates quantitative and qualitative methods of data collection and analysis to better understand the research problem. The researcher can use two or more research methods in a single research project in a mixed methods research approach (McChesney & Aldridge, 2019). The researcher will need to determine how to connect the quantitative and qualitative methods to eliminate any difficulties in the data analysis and interpretation phase of the research to use the mixed methods research approach (Piccioli, 2019). I did not use the mixed methods approach for this study because the purpose of this study was to explore strategies from the perspective of the nonprofit leaders, not to test a hypothesis as required by the quantitative method. Therefore, the qualitative method was best suited for this study.

## **Research Design**

The researcher uses a case study design to develop an in-depth understanding of a single or multiple case (Thiele et al., 2018). The researcher uses the case study design to study individual cases in their real-life context for a specific period and may be used for single or multiple case studies (Harwati, 2019). The case study is an appropriate method for the exploratory phase of an investigation (Aczel, 2015). A case study design was appropriate for this research study because I explored the strategies nonprofit leaders used to identify and implement meaningful measurements to secure funding for their nonprofit organization's mission.

The researcher uses the ethnographic research design to interpret and describe shared patterns amongst cultures and social groups (Thiele et al., 2018). In an ethnographic research design, the researcher can fluctuate between observation and participation (Melero & Gil-Jaurena, 2019). In the ethnography research design, the researcher focuses on work in the field and finds explanations as to why actions, behaviors, or events occur (Ryan, 2017). The ethnographic approach was not appropriate because I did not seek to learn about the culture of a group of an environment.

In the phenomenological research design, the researcher focuses on understanding the lived experiences of a phenomenon by using in-depth interviews (Thiele et al., 2018). The researcher who uses the phenomenological research design considers the whole person and values his or her experiences (Morrell-Scott, 2018). The phenomenology approach allows the researcher to understand the unique experiences and perspectives of individuals involved in the data collection process (Hopkins et al., 2017). The

phenomenological research design was not appropriate for this study because the purpose of this study was not to summarize the experiences of the research participants.

In summary, researchers use the case study to conduct an analysis and develop an in-depth understanding of a phenomenon within a real-world context (Yin, 2018). One of the key features of the case study is the researcher collects and analyzes data from multiple sources (Guetterman & Fetters, 2018). The case study design was appropriate for this research study because I collected data from multiple sources to explore strategies that nonprofit leaders used to identify and implement meaningful measurements to secure funding for their nonprofit organization's missions.

Researchers may consider data saturation as the gold standard for qualitative research because data saturation impacts the reliability and validity of qualitative research (Hancock et al., 2016). The researcher reaches data saturation when enough adequate information is obtained from the data analysis to replicate the study when further coding is not feasible, and the redundancy of information indicates no new information is observed in the data (Fusch & Ness, 2015). The researchers make the decision to stop data collection based on their judgment and experience, but the researchers may experience challenges with determining the point of data saturation because they only have information on what they have discovered (Tran et al., 2017). I reached data saturation by reviewing the client's documents and through the interview process. To reach data saturation, I used open-ended questions as part of my interview process to obtain in-depth information from the participants. I used member checking to enhance the rigor of my study and validate the data analysis of the information from the participants.

Member checking, known as participant and respondent validation, is a technique of returning the data or results to the participants to check for accuracy and resonance with their experiences to ensure the credibility of the results (Birt et al., 2016). The researchers conduct the member checking technique to verify the accuracy of the data once they have completed the data collection and data analysis process (Naidu & Prose, 2018). The researchers use member checking as a technique to help establish validity by providing the participants with the opportunity to check the accuracy of, amend and/or comment on raw data or research results (Brear, 2019).

### **Population and Sampling**

For the population of this qualitative research case study, I selected three senior leaders from a nonprofit organization located in the mid-Atlantic region of the United States. A population is the group of people who provide valuable and relevant information to the researcher for the purpose of the study (M. N. Saunders, Lewis, & Thornhill, 2015). Researchers use purposeful sampling to enhance the validity and credibility of the research study (Lin & Paez, 2020). Purposeful sampling is the researcher's intentional selection of participants to obtain the most relevant and valuable information to answer the research question (Johnson et al., 2020). Researchers use purposeful sampling to select interviewees or participants based on their richness and relevance of information in relation to the research question of the study (Yin, 2018). The selected leaders for this study have significant knowledge and experience in strategies to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions.

Researchers use purposeful sampling to select participants with extensive knowledge and experience who can provide insights and an in-depth understanding of the phenomenon (Patton, 2015).

The Walden University Consulting Capstone administrator selected and assigned the nonprofit organization for this study. The administrators provided the contact information for the Chief Executive Officer (CEO) of the organization. Once the problem statement was determined, the CEO provided the names of the three senior leaders who would be the participants for the study. The selected senior leaders work for the organization and had the knowledge and expertise to provide significant information to answer the research question. The purposive sample consisted of three directors of the organization who had experience in identifying and implementing meaningful measurements for the organization. Guetterman and Fetters (2018) explained sampling should be intentional and the researcher might determine the sample size based on the qualitative research design. In qualitative research, smaller samples are used to understand the complexity and context of the phenomenon, rather than represent populations (Gentles et al., 2015). The three senior leaders of the nonprofit organization provided significant and relevant data to answer the research question for the study.

In qualitative research, the researcher uses sample sizes by recruiting participants who can provide rich information, are knowledgeable about the phenomenon, and can articulate and reflect in-depth information relevant to the study (Moser & Korstjens, 2018). Researchers conduct qualitative research with a small number of participants in an organization and are not decided as a representative sample of any population (Sarma,

2015). Researchers select the appropriate sample size based on the data needed and the diversity of the participants' characteristics (Aksakal et al., 2019). Researchers who use a large diverse sample may obtain wasteful data that might limit the researchers' ability to effectively examine the data, achieve data saturation, and probe data collection (Roy et al., 2015).

In qualitative research, one of the criteria for researchers to decide if they have the appropriate sample size is if they have reached the point of data saturation (Gentles et al., 2015). The point of data saturation is reached when the researcher has obtained enough information to replicate the study, the ability to obtain additional information has been attained, and any additional coding is no longer practicable (Fusch & Ness, 2015). The researcher's experience and expertise in interviewing and the subject contents are critical in helping the researcher reduce the sample size and reach saturation (Roulston, 2016). For a qualitative case study research, researchers use interviews as one of the most common methods to collect data (Sarma, 2015). Researchers use interviews to understand human lived experiences based on the interviewees' information (Gentles et al., 2015). Researchers can obtain rich and detailed information from interviewees by allowing the participants to freely express their ideas using semistructured interviews (Li et al., 2019). Semistructured interviews allow the researcher to use open-ended questions to obtain a deeper understanding of the phenomenon (Wafa et al., 2020).

I conducted semistructured interviews with open-ended questions to obtain rich data from the participants. I recorded the participants' interviews and provided them with a synthesized summary of their interviews. Researchers should put the interviewee at



ease and select interview locations that are free of distractions (Luizzo, 2019). According to the IRB guidelines of Walden University, the researcher was required to conduct interviews away from the organization's location. To ensure the participants were prepared for the interview, I sent the interview questions in advance to the participants by email. Once the participant reviewed the questions, the participant and I agreed on the time and length of the interview. The participants and I selected our specific locations free of distractions and I conducted the interview by phone.

### **Ethical Research**

Researchers need to consider the ethicality of what they are doing, gain the consent of the involved participants, and be careful about not exploiting their relationship with the participants (Ellis, 2019). According to Yin (2018), as part of being ethical and protecting participants in the case study, researchers should gain informed consent from all participants of the study, protect the privacy and confidentiality of participants, protect participants from any harm, and receive formal approval of the study from the IRB. Researchers also obtain informed consent from participants to seek regulatory approval of the safeguards to protect the participants from breach of confidentiality or harm (Sobočan et al., 2019). Before contacting any prospective participant, I received approval from the IRB at Walden University (approval no. 06-26-19-0674575). Also, the owner of my assigned client organization signed the Doctor of Business Administration Research Agreement that details the responsibilities of the client organization and Walden University.

Based on the ethical standards of Walden University, I requested and obtained a consent form by email from the senior leaders that authorized me to interview the senior leaders of my client organization as part of my doctoral study. In the email, I outlined the interview procedures, voluntary nature of the study, risks and benefits of being in the study, privacy rights, and contact information for the Walden University representative if the participants wanted to privately discuss their rights as participants. Once I identified the study's participants, I contacted each participant to explain the purpose and scope of the study. The voluntary nature of their participation, and how they could withdraw at any time during the study by informing me by email or phone.

The participants in this study did not receive any compensation or other incentives for participating in the study. Researchers protect the identities of participants mainly through anonymization and the concealment of the participants' identities, which may help the researcher to obtain authentic statements (Surmiak, 2018). I will maintain the confidentiality of the identities of the client nonprofit organization and the senior leaders who participate in the study. To protect the identity of the client nonprofit organization; I used the pseudonym "ABC." To protect the participants' identities, I used alphanumeric codes such as P1, P2, and P3 to identify the participants in the study. Additionally, to ensure confidentiality and to protect the rights of the participants, I redacted all identifying information from the interview transcripts, the organizational results, and the collected data. I stored all information and collected data in a secure and electronic file. After 5 years, I will destroy all data collected for this study to protect the confidentiality of the senior leaders who participated in this study. I will erase all data from the hard

drive and destroy all printed documentation related to the participants' identity by shredding the documents.

### **Data Collection Instruments**

The researcher is the primary instrument of data collection and analysis in qualitative research (Clark & Vealé, 2018). In qualitative research, the researcher uses semistructured interviews with open-ended questions as one of the most common data collection methods to obtain a deeper understanding of the human experience (Bearman, 2019). I served as the primary data collection instrument for this study. I conducted semistructured interviews with open-ended questions and reviewed public and internal documents provided by the leaders of the nonprofit organization for data collection. I also used the public data from the *GuideStar* organization that is an online service organization that provides information on nonprofit organizations in the United States (GuideStar, 2018). I conducted semistructured interviews with the three nonprofit senior leaders of the nonprofit organization. I also used the Baldrige Performance Excellence and its Criteria as the primary source to collect data on the current operations of the client organization.

Researchers use semistructured interviews to allow the participants to freely express their ideas and obtain rich and direct information (Li et al., 2019). Also, researchers use interviews as a method to reach data saturation in a qualitative study (Fusch & Ness, 2015). I compiled and asked the senior leaders seven open-ended interview questions that were related to the research question and the conceptual framework of the study. Before interviewing the senior leaders, I reviewed the interview

questions with the client leader. I used a recording device, a laptop computer, and a telephone to assist me with the interview process. The researcher uses recording devices to preserve natural interactions, reduce researcher bias, and capture the verbatim meanings of the participants (Nordstrom, 2015). I recorded the participant's interviews to obtain the verbatim meanings of the participants.

To enhance the reliability and validity of the data, I used member checking and provided the participants with a summary of their interview answers for an opportunity to review the information and ensure the information was accurate. I provided each participant with a summary of their answers. The researcher uses member checking, known as participant or respondent validation, to validate, verify, or assess the trustworthiness of the qualitative results (Birt et al., 2016). I used member checking to ensure the study findings aligned with the leaders of the nonprofit organization. I included a copy of the interview protocol in the Appendix. I requested all internal documents be transmitted electronically. By following the Walden University policy, I will destroy all documents after 5 years.

### **Data Collection Technique**

In qualitative research, there are many data collection methods including observations, in-depth interviews, and focus groups (Rosenthal, 2016). In this study, I used semistructured interviews as the primary source of data collection. During semistructured interviews, the researcher asks questions from a proposed list and uses follow-up questions to get a better understanding of the information (Chu & Ke, 2017). Some of the advantages of using semistructured interviews are: (a) the interviews enable

the researcher to get close to the inner world of the participants, (b) allows the participant to answer questions at their own pace and degree of exposure, (c) the interviews provide the researcher with the opportunity to ask open-ended questions, and (d) the interviews allow the researcher to obtain more of a discussion with the participants of the study to facilitate sharing of their perspectives and experiences (Ophir & Jacoby, 2020; Wada et al., 2020). A disadvantage with the semistructured interview is that the researcher must be more attentive to keep the conversation in line with the research objectives because the participant may digress from the conversation and reveal new issues and angles (Van Puyvelde, 2018). Another disadvantage of the semistructured interviews is the participants may be reluctant to answer sensitive questions (McIntosh & Morse, 2015).

In addition to conducting semistructured interviews, I obtained and reviewed the client's organizational documents. Researchers use organizational documents to obtain contextual information to support their study (Yin, 2018). Researchers can also collect data by examining and analyzing documents from different sources (Colorafi & Evans, 2016). I obtained and reviewed the organization's structure, website information, financial reports, policies, financial statements, and annual reports. The advantage of obtaining and analyzing these documents allows the researcher to gather rich data about the context, understand the organizational culture, and help with the triangulation process (Marshall & Rossman, 2016). Another advantage of the researcher reviewing the organizational documents is the ability to gather valuable information to support the reliability and validity of the study (Yin, 2018). Disadvantages of researchers reviewing documents as a data collection technique are the documents may be incomplete that leads

to inaccurate information and the researcher might not be able to obtain all company documents for review and analysis (Yin, 2018).

I used member checking to ensure my interview interpretation and research results were accurate and credible. After the researcher collects and analyzes the data, member checking is used to verify the accuracy of the data (Chandler et al., 2015). Member checking is a well-established qualitative research process that provides the participants the opportunity to check the accuracy of, amend, or comment on raw data or the research results (Harvey, 2015). After I completed the semistructured interviews and analyzed the data, I provided the participants with the interview transcript and my analysis of their interviews to allow the participants to review the information and provide feedback to any area of the analysis that required clarification. After I completed my final document analysis, I provided the client leader with the information and analysis to allow her to provide any feedback for clarification on any area that required adjustment. Once the feedback was received from the client leader and participants, I reviewed and eliminated inaccurate data to ensure the validity and reliability of the study.

### **Data Organization Techniques**

To ensure rigor, researchers maintain a reflexive diary or journal to document personal feelings and reactions to minimize researcher bias and an audit trail of documentation that may have been used as part of the analytical process (Taylor & Thomas-Gregory, 2015). Researchers can quickly access data if they have an effective organization process (Yin, 2018). I documented my data in a reflective journal to keep track of my data and information on various topics of the research. I took handwritten

notes in the journal of telephone conversations, personal thoughts, and during the interviews of the participants. The reflective journal allowed me to reflect on the data information and allow me to eliminate any bias or prejudice on the information provided by the participants. I organized an electronic folder database on my computer to store and keep track of my data. I labeled the electronic folders based on the topic and relevance to the research data. I converted hard copies of documents into an indexed portable document file and saved those documents in the electronic folder.

Researchers may use pseudonyms to protect the identity of the participants and to ensure the data could not be linked back to the participants (B. Saunders, Kitzinger, & Kitzinger, 2015). I used pseudonyms to protect the identity of the participants of this study. To ensure the confidentiality of the participants, I used the pseudonyms Participant 1, Participant 2, and Participant 3 to identify the participants of the study. Researchers use color coding to capture the main ideas and issues from the data and develop statements from the data (Saldaña, 2015). Researchers use the codes to label and organize data to identify common themes within the data (Clark & Vealé, 2018). I used color coding to capture the main ideas and developed statements from the interview data. I then used the codes to label and organize the data, categorizing the data so major themes for the study were generated based on identified patterns. Once the coded themes were developed, the interview responses were transcribed and stored in an electronic folder.

I have stored all documents, transcripts, recordings, and other data on a password-protected flash drive. I will store all hard copies, electronic copies, and flash drive in a locked file cabinet in my home for 5 years in accordance with the IRB and Walden

University requirements. I will destroy all materials after 5 years in accordance with Walden University requirements (Walden University, 2017).

### **Data Analysis**

I used methodological triangulation as the data analysis process for this single case study. Methodological triangulation is a qualitative research strategy that uses multiple methods to study a research problem (Joslin & Müller, 2016). The researcher uses methodological triangulation to enhance the reliability of the results and to verify or re-verify the results (Iqbal & Hassan, 2015). I used an electronic organization system to organize the data and triangulated the interview and documents data after I completed the data collection and member checking.

For this study, I conducted, recorded, transcribed, and presented the participant interviews for member checking, which allowed the participants to clarify and verify the accuracy of the information. I provided the participants with a summary of the interview transcript, after obtaining their interview over the phone. After each participant's interview, I reviewed the transcript, synthesized their responses, and organized their responses into sentence summaries for each question. After I synthesized the transcripts, I sent the synthesized transcript to the participant's private email. I conducted a follow-up email with each participant to discuss the details, interpretation of the data, and clarify any questions or issues with the data. The participants verified and corrected the data and provided additional information they wanted to contribute to the study. The feedback from the participants allowed me to verify the accuracy of the data and eliminate any bias or prejudice.



In qualitative research, researchers use the thematic analysis as a data analysis strategy to identify, analyze, and report patterns or themes within the data (Castleberry & Nolen, 2018). For this study, I used Yin's five-step thematic approach which consists of: (a) compile the data, (b) disassemble the data, (c) reassemble the data, (d) interpret the data, and (e) draw conclusions about the data (Yin, 2018). Researchers use the coding process to interpret large segments of text and information that links the meaning of the information to the identification of themes (Belotto, 2018). In qualitative research, the coding process consists of assembling, categorizing, and thematically sorting the data to provide an organized platform for the construction of meaning (Williams & Moser, 2019). I conducted the coding of the data by labeling the data by using descriptive words for words and sentences with similar meanings and then grouped the data to help me interpret the data. Once I conducted the coding process, I reviewed the codes with the participants as part of the member-checking process. I used Microsoft Excel as a data management tool to help facilitate data analysis. Researchers use Microsoft Excel to identify and display themes and codes, sort data based on color coding, and convert the data into tables and graphs (Bree & Gallagher, 2016). I used Microsoft Excel to code and compile the interview data into themes.

After I identified recurring themes of the data, I used the codes and themes to compare with elements of the Freeman (1984) stakeholder theory, Juran trilogy method, and scholarly literature on meaningful measurements. The thematic process consisted of using the data from the participants' interviews, reviewing, and organizing the meaning of the data to determine patterns and themes, and interpreting the patterns and themes in a

manner that was easy to understand. I used Microsoft Excel to help develop the themes and codes. I used the 2019-2020 Baldrige Performance Excellence Program (2019) to assist in data collection and identification of critical factors for identifying meaningful measurements. I cross-referenced the Baldrige framework, interview data, organizational documents, and the tenets of the stakeholder theory to analyze the collected data to understand strategies leaders use to identify meaningful measurements for nonprofit organizations. Based on the analysis of the data, I determined the key themes that I used to determine the strategies leaders used to identify and implement meaningful measurements. I then used methodological triangulation to review these findings and compare them with existing literature and the conceptual framework.

### **Reliability and Validity**

#### **Reliability**

In qualitative research, reliability refers to the consistency and stability of the findings (Leung, 2015). Dependability refers to the consistency and reliability of the research findings (Moon et al., 2016). Triangulation can address both reliability and validity and strengthens the validity of a study through countering bias that may arise (Farquhar et al., 2018). Member checking is used to verify the accuracy of the data (Chandler et al., 2015). I used member checking and triangulation to ensure the dependability of the data. I performed member checking of the data and sent the synthesized summary transcripts to the participants' private email for their review, clarification, and additional data contributions to the study. I then conducted a follow-up

with the participants to discuss the interpretation of the data. The participant verified and corrected the data and provided additional information that could be used for the study.

### **Validity**

Researchers apply different terms to validity such as trustworthiness, credibility, dependability, confirmability, authenticity, rigor, plausibility, goodness, soundness, transferability, and quality assessment (Fitzpatrick, 2019). Validity refers to the truthfulness of the data and decreases the opportunity for researcher bias (Mohajan, 2017). Validity is the appropriateness of the tools, data, and research that consists of the researcher using the correct methodology for answering the research question, the correct design for the methodology, and if the researcher's results and conclusions are valid for the sample and research context (Leung, 2015). Validity is the extent to which a study measures what it is so supposed to measure (Heale & Twycross, 2015). To increase the validity of the study, I conducted methodological triangulation, member checking, and data saturation. Researchers use participant checks and follow-up interviews to enhance credibility (Hoover & Morrow, 2015). I used member checking to enhance the credibility of this qualitative research study. I interviewed participants of the study and provided them with a synthesized summary of their interviews to allow them to review the information for accuracy and corrections.

Researchers use transferability as a criterion to evaluate trustworthiness and rigor in qualitative research (Morse, 2015). Transferability refers to the potential of the findings to be applicable to other individuals, groups, time, context, or setting (Baillie, 2015). Researchers can improve the transferability of the study by providing a detailed

description of the research context, limitations of the application of the study, and the selection and characteristics of the participants (Moon et al., 2016). To meet the transferability requirement, I explained the assumptions, limitations, and delimitations of the study. I provided detailed information about the participants and the context of the study so researchers can use this information for future research.

Confirmability supports that the findings are not influenced or affected by the researcher's biases, characteristics, or assumptions (Langtree et al., 2019). Confirmability of the study consists of combining the data, data analysis processes, and research findings and tracking those processes in an audit trail (Hoover & Morrow, 2015). Researchers verify the confirmability of the study. Researchers state their philosophical position and influence that helps define their relationship between the researcher and the subject to meet the criterion for confirmability of the study (Moon et al., 2016). Researchers might limit any bias by using triangulation and a reflexive journal as a tool for an audit trail (Morse, 2015). To address the confirmability of the study, I used a reflexive journal to take notes from participant interviews, telephone conversations, and personal thoughts. I used methodological triangulation to ensure the credibility and validity of the study.

Researchers consider data saturation as the gold standard for qualitative research (Hancock et al., 2016). Researchers achieve data saturation at the point of data collection and data analysis when new and additional information provide no new information relative to the research question (Guest et al., 2020). Researchers can obtain data saturation from a small sample size of participants if the researcher has the best opportunity to reach data saturation from this sample of participants (Fusch & Ness,

2015). I reached data saturation through the interview process of the senior leaders and review of documents from the client's organization.

### **Transition and Summary**

In Section 2, I presented a detailed explanation of the qualitative single case study. The purpose of this qualitative case study was to explore strategies leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. During this study, I was the researcher and functioned as the primary data collection instrument. I used the *Belmont Report* as a guide to conduct the ethical research. I conducted semistructured interviews using the interview protocol and collected and analyzed organizational documents. I used the organizational documents, member checking, methodological triangulation, and data saturation to ensure and enhance the reliability and validity of the study.

In Section 3, I provide a detailed explanation of the application of the Baldrige Performance Excellence Program to discuss the client organization. I interviewed the participants to collect data for this research study. In this section, I provide a summary of key themes, the findings of the study, and contributions and recommendations for future research. I also include the client's organizational profile, by exploring the components of the Baldrige Framework which are: (a) leadership, (b) strategy, (c) customers, (d) measurement, analysis, and knowledge management, (e) workforce, (f) operations, and (g) results.

### Section 3: Organizational Profile

The purpose of this qualitative single case study was to explore successful strategies leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. Business leaders use the organizational profile of the Baldrige Excellence Framework to understand their organization, their business operations, key factors that shape their organization's operating environment, and the competitive environment (Baldrige Performance Excellence Program, 2019). Leaders use the organizational profile to understand requirements to help them meet their current and future organization's success and opportunities and constraints placed on the organization's systems. I thematically analyzed the data collected for this study. The key themes developed from this study were: (a) meaningful measurements, (b) employee engagement, and (c) stakeholder demands.

#### **Key Factors Worksheet**

##### **Organizational Description**

Client ABC is the pseudonym for the client organization used in this study. Client ABC, a nonprofit organization established in 2000, is in the mid-Atlantic region of the United States. The organization provides interactive visual arts classes in schools, community centers, group homes, shelters, permanent housing facilities, hospitals, and senior housing facilities. The organization also provides a job program, service-learning opportunities, community service projects, public art efforts, a social enterprise retail

store, and a leadership program. The organization has experienced steady growth, from four classes to over 12,000 classes annually, with a proven track record for developing individuals for success.

### ***Organizational Environment***

The organization's environment is an important and essential element of the framework of Client ABC's existence and success. Leaders can use the Baldrige Professional Excellence Program (2019) criteria to establish and implement strategic decisions that might affect the organization's future. The Client ABC organizational environment consists of (a) the product offerings; (b) the organization's mission, vision, and values; (c) workplace profile; (d) assets; and (e) regulatory.

**Product Offerings.** Client ABC provides product offerings consisting of training and educational programs such as interactive visual arts, job skills, leadership, sales, marketing, and customer service. These programs are conducted at offsite facilities such as schools, community centers, group homes, shelters, permanent housing facilities, hospitals, and senior housing facilities. The senior leaders of Client ABC also have a social enterprise retail store within their office building that allows individuals to display and sell their artwork. Client ABC organizational leaders seek donations or sponsorships to support the services offered by the organization. The organizational leaders coordinate with stakeholders such as leaders, directors, and principals of schools, community centers, hospitals, senior housing facilities, group homes, permanent housing facilities, and shelters to determine their needs and are dedicated to meeting the stakeholders' expectations. The senior leaders meet with these stakeholders on an annual basis and as

needed to determine the population of youth and adults who will need Client ABC's programs. The senior leaders determine the stakeholders' needs, expectations, and requirements and provide the appropriate programs to service the specific population.

In addition to the organization's core competency of providing interactive art classes to enhance people's lives, the senior leaders of Client ABC provide: (a) job programs, (b) community service learning opportunities, (c) public arts efforts, (d) a social enterprise retail store, and (e) a leadership program. The leaders have established a workforce development program to help youth learn essential job skills. Leaders have provided a safe and collaborative work environment for young adults. The leaders provide innovative ways to help teenagers and adults of diverse backgrounds to develop leadership skills and facilitate dialogue across cultural barriers.

The leaders established a workforce development program that uses art as a tool to help youth ages 14 and older to learn essential job skills. The students enrolled in this workforce development program experience a structured work environment while building job readiness and life skills. The students benefit from the program by learning how to comply with the rules and procedures of a workplace, engaging in a program with concrete expectations and structure, and learning how to think creatively about their personal goals and future plans as each session offers them a sense of belonging and accomplishment. The students of the workforce development program produce marketable art to sell at Client ABC's social enterprise retail store. This program has allowed the leaders to provide a safe and collaborative work environment for almost 900 young adults.



The leaders provide community service-learning opportunities for individuals of all ages to volunteer for community service. The leaders of Client ABC engage over 4,000 volunteers a year through public art workshops, community service events, and classroom support. The leaders established a program that allows participants to create public art efforts such as public art murals, mosaics, and other public art displays and paintings at installations throughout the mid-Atlantic region of the United States. The participants of this program have completed over 300 public art installations that beautify public spaces in the mid-Atlantic region of the United States. The leaders have established a social enterprise retail store that displays and allows participants to sell the work of the students and volunteers. The sale proceeds of the retail store are shared between the organization and artist or community partner. Based on the sales of the artwork within the social enterprise retail store, the leaders paid over \$50,000 in proceeds to their community partners.

The leaders of Client ABC have established a leadership program that brings together 10th and 11th grade public and private school students of diverse backgrounds to develop leadership skills and engage in dialogue across cultural backgrounds. The leaders provide guest speakers and experiential opportunities to the students to expose them to community challenges. The leaders also provide the students with the opportunity to develop different perspectives to handle life challenges. The leaders of the program introduce and reinforce leadership competencies that will help the students better solve community problems and enhance their civic participation.

**Mission, Vision, and Values.** The client leader and senior leaders of Client ABC organization work closely together as a team to fulfill their mission and vision statement. The mission statement and vision of Client ABC is to enhance the lives of people in need through visual art. The employees and leaders operate on the values of inclusiveness, innovativeness, healthful relationships, a positive work environment, empowerment, and family-based environment. These values drive the behavioral patterns within the organization that is critical for the organization's success.

**Workforce Profile.** Client ABC's organization's workforce consists of fourteen employees of which eight are full-time with benefits and six are part-time. The full-time and part-time employees are in the office building. The classes are conducted off-site in the different schools or other installations within the mid-Atlantic region of the United States. The teachers who support Client ABC's programs are contracted employees who are paid by the senior leaders of the organization. Currently, the employees and the contracted employees are nonunion workers. The senior leaders might attend the training and educational sites with the teachers to ensure the teachers conduct the programs according to the senior leaders of Client ABC. The board of directors is the governing body in the Client ABC organization and participates in meetings, decision-making, and provision of advisory services. Table 1 depicts Client ABC's current workforce composition.

**Table 1***Workforce Composition Overall*

Category	Compensation	Number of personnel
Full-time employees	Paid	8
Part-time employees	Paid	6
Program teachers	Paid (contracted)	70
Board of directors	Unpaid	20
Volunteers	Unpaid	5,000

**Assets.** The assets of Client ABC included a furnished building, office equipment, software, education curriculum, and human capital. Client ABC rents the building with a lease agreement that ends December 31, 2022. The landlord allows for one renewal term of 5 years at Client ABC’s option. The leaders of Client ABC use the building for their daily operations. The social enterprise retail store is also located in this leased building that allows for participants to sell their art. The Client ABC programs are not conducted in this building. The senior leaders maintain a website and publish newsletters to socialize their program services and generate funding from donors and sponsors to support Client ABC’s missions.

**Regulatory Requirements.** The Client ABC organization is a nonprofit organization registered with the government as of 2001. The organization is an IRS compliant licensed 501(c)(3) and a tax-exempt nonprofit organization. The leaders of the Client ABC organization comply with all industry standards, environmental guidelines,

product regulations, and financial requirements such as filing for taxes under the Exempt Purposes-Internal Revenue Code section 501(c)(3) (2019). The leaders also participate in GuideStar information services to ensure transparency with donors and the industry. By using GuideStar, Client ABC's financial and performance information is public information placed on the GuideStar website for donors or other stakeholders to review.

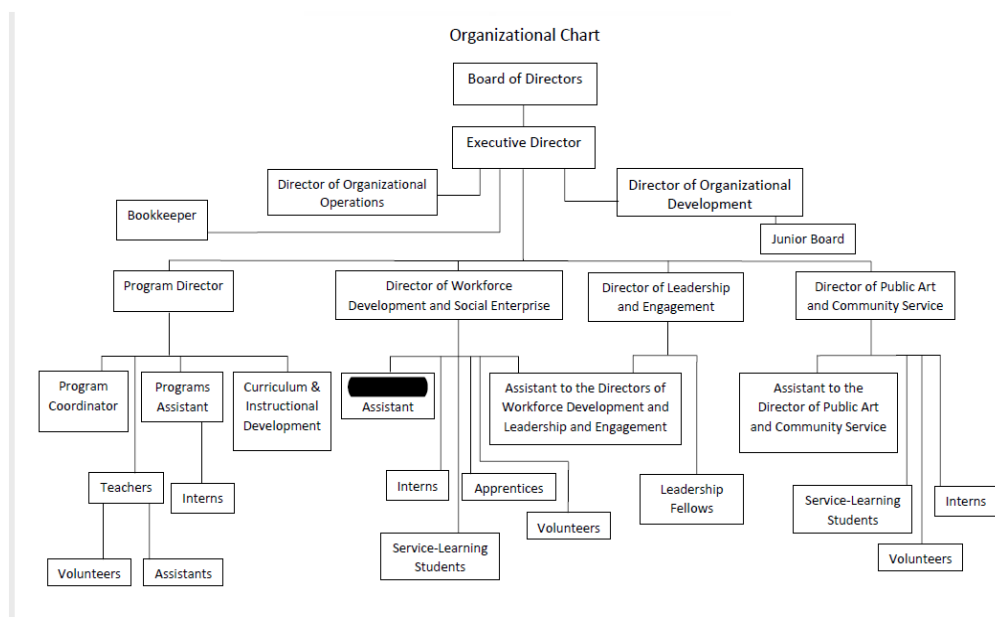
### ***Organizational Relationships***

It is essential for the leaders of Client ABC organization and the board of directors to have operational relationships to identify which functions the organization needs to perform to achieve the organization's mission and purpose (Baldrige Performance Excellence Program, 2019). The board of directors is the governing body of the organization. There are 20 members that make up the board of directors for Client ABC. The board of directors hires and evaluates the performance of the executive director. The founder and CEO of Client ABC is the executive director of the board of directors. The executive director leads Client ABC's workforce and reports directly to the board of directors. The executive director is responsible for the organization's staff and operations. The board of directors consists of three committees: (a) fundraising, (b) investment, and (c) program. The board of directors' member meet at least annually, attend periodic planning retreats with the senior leaders, and attend at least one of Client ABC's programs or classes a year to evaluate the efficiency and effectiveness of the programs. The following sections consist of the discussion of the elements associated with Client ABC organization such as (a) organizational structure, (b) suppliers and partners, and (c) customers and stakeholders.

**Organizational Structure.** Client ABC is a 501(c)(3) organization with an organizational structure and governance body. The organizational and governance structure (Figure 1) within Client ABC consists of reporting relationships based on functional areas. The board of directors is the governing body for Client ABC organization and helps the senior leaders to formulate policies to run and support the business. The CEO, who is also the Executive Director and a member of the board of directors, reports to the board of directors. The senior leaders, executive director, and board of directors are the senior leadership team. The directors, who oversee various activities within the business, report to the executive director.

**Figure 1**

*ABC's Organizational Structure and Governance Body*



**Customers and Stakeholders.** Stakeholders are groups that are or might be affected by the organization's activities or success such as customers, the workforce, governing boards, donors, suppliers, funders, and local and professional communities (Baldrige Performance Excellence Program, 2019). Client ABC's stakeholders are the community youth and adults, families, teachers, local educational institutions, public art institutions, board members, retail customers, volunteers, donors, staff, government, and local and professional community partners. Volunteers help the organization lead and maintain the programs offered by the organization. The community youth and adults create and sell merchandise for the social enterprise retail store and the proceeds are distributed to the community youth and adults and community partners to help change lives within the community. The families consisting of parents and grandparents are stakeholders who benefit from the programs offered to the youth. Client ABC depends on financial support and supplies from grants, loans, and donors. The staff works closely with the teachers to develop the curriculum and conduct multiple program initiatives.

**Suppliers and Partners.** The suppliers for Client ABC are the individuals who provide their services, resource materials, training and development, and facilities used by Client ABC to complete training and development for the community youth and adults and community partners. The key partners are the community leaders and stakeholders who support and understand Client ABC's expectations and missions of the various programs. Leaders of Client ABC develop collaborative and long-lasting relationships with the partners who support Client ABC's mission. The leaders build collaborative relationships with leaders of local schools, community centers, group homes, shelters,

permanent housing facilities, hospitals, and senior housing facilities who support the need to create initiatives and accessible paths for individuals living in the most vulnerable communities of the mid-Atlantic region of the United States. Table 2 depicts some of Client ABC's community partners for 2019.

**Table 2**

*Client ABC's Community Partners*

Type (Number of organizations)	Organizations
Aging adults (7)	Easter Seals Adult Day Services, Lakeview Apartments, Solo Gibbs Senior Center
Community centers (5)	Hampden Family Center, Greenspring Overlook, UMB Community Engagement Center
Group homes & treatment centers (4)	Board of Childcare, Mosaic Community Services, Mountain Manor
Hospitals (2)	Mt. Washington Pediatric Hospital, Sinai Hospital
Recreation facilities (1)	Maryland Zoo in Baltimore
Schools (30)	Arundel Elementary, Barclay Elementary/Middle, Commodore John Rogers
Service partnerships (2)	St. Elizabeth School, The Baltimore Lab School
Shelters, transitional & low-income housing (6)	Catherine's Cottage, Christopher's Place Employment Academy, House of Ruth
Workforce development (11)	Academy for College and Career Exploration, Arrow Child & Family Ministries
Veterans center (1)	Loch Raven VA Outpatient Center
Youth and families with special needs (1)	Baltimore Autism Society
Youth programs (3)	Art of Leadership, Elijah Cummings Youth Program, Police Athletic League, University of Maryland, Baltimore

## **Organizational Situation**

The purpose of this qualitative single case study was to explore successful strategies leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. Organizational situation refers to the strategic challenges and advantages leaders of organizations might face in the areas of business, operations, societal contributions, and workforce (Baldrige Performance Excellence Program, 2019). Leaders of Client ABC face competition in their industry because of the similar programs offered by local schools and other organizations within the communities. The senior leaders continue to explore various strategies to promote and advertise their programs and services to benefit ABC's mission and expectations.

## ***Competitive Environment***

Leaders of nonprofit organizations compete with similar organizations for funding and volunteers and must understand the essential characteristics of the competition to determine their competitive advantage in the industry and marketplace (Baldrige Performance Excellence Program, 2019). I reviewed the competitive environment for Client ABC using the below factors of competitive position, competitive changes, and comparative data.

**Competitive Position.** Founded in 2000 by the executive director, ABC has consistently and successfully worked diligently to build long-lasting relationships with communities of artists, educators, and nonprofit agencies and harness the benefits of arts education to cultivate positive, long-lasting changes in the lives of the people and



communities. Client ABC is a small nonprofit organization with an average revenue of \$1.6 million. The leaders of Client ABC believe they provide innovative programs and services that support the demands of the customers within the mid-Atlantic region of the United States. Client ABC's primary competitors are the local schools that offer education to students and other organizations within the community that provide services that support the societal well-being of local community youth and adults. The senior leaders of Client ABC continue to communicate and collaborate with their customers to ensure they can continue to satisfy their needs and sustain operations.

**Competitiveness Changes.** A significant change that has impacted Client ABC's operations is the use of electronic evaluations to determine the effectiveness and efficiency of their programs and customer satisfaction. During the 2020 COVID-19 pandemic, the leaders established an online performance evaluation process because of the limited ability for community youth and adults to conduct the evaluations at physical locations. The online performance evaluations will allow the leaders to obtain quick and accurate feedback from the youth and adults who participate in the offered programs. The leaders of Client ABC do not foresee any other major changes that will change the competitive environment but acknowledge that as additional funding is obtained, there is an opportunity for additional programs that can serve community partners, youth, and adults.

**Comparative Data.** Client ABC is the only organization within the mid-Atlantic region that provides visual arts to underserved area children, youth, and adults in schools, group homes, shelters, community centers, recreation centers, foster care agencies, senior

facilities, and hospitals. Based on programs and services offered by Client ABC, the leaders of Client ABC might compare learning outcomes for their art classes with the learning outcomes for art classes taught in schools. The leaders might obtain this data from leaders who facilitate their programs who are also teachers employed by the local schools. Client ABC leaders assess their organization's effectiveness and efficiency by using internal data sources such as Client ABC's program survey data, year-to-year comparison of the organization's survey data, financial measures, quality indicators to determine the number of repeat customers, and performance measurement tools to support the number of participants who graduate with a job in place who benefited from attending one of Client ABC's programs.

### ***Strategic Context***

Client ABC has been in operation for over 19 years and the leaders have learned and gained knowledge about the organization's effectiveness and efficiency by obtaining feedback and recommendations from its participants, community partners, local schools, the board of directors, teachers, and staff. Client ABC's strategic advantages are: (a) a committed, engaged, and knowledgeable staff, (b) committed and knowledgeable volunteers and donors, (c) ability to deliver program services to various sources, and (d) growth from four classes to over 12,000 classes annually. The challenge is the leaders' ability to provide quantitative measurements for programs and process efficiency and effectiveness to its stakeholders to secure funding.

### ***Performance Improvement System***

Leaders and staff of Client ABC meet weekly to share information and feedback on the organization's performance. The leaders discuss the number of classes offered, number of participants who graduate with a job in place, number of volunteers who participated to support the programs, customer feedback from the surveys, sales proceeds from the social enterprise retail store, and any information on the success of the programs from the community partners. Senior leaders meet one-on-one with the teachers weekly or as needed to discuss challenges, successes, lessons learned, improvements, and recommendations for the organization's programs. Senior leaders meet with their community partners monthly and as needed to discuss their demands, expectations, successes, and improvements for program services offered by Client ABC. The leaders of Client ABC are committed to relying on the participants, community partners, teachers, staff, leaders, and stakeholders to provide feedback and recommendations for improvement to support an effective performance improvement system. Table 3 depicts Client ABC's performance improvement process.

**Table 3***Performance Improvement Review Process*

Primary attendees	Secondary attendees	Meeting frequency	Scope or function
Executive director	Directors	Weekly	Progress updates of programs and initiatives
Directors	Department leaders/staff	Weekly	Discuss program changes
Directors	Program teachers	Weekly	Discuss program improvements
Executive team	Senior Leaders and Community Partners	Monthly	Discuss changes and progress
Board of directors	Executive director and board members	Quarterly	Discuss organization performance and improvements

**Leadership Triad: Leadership, Strategy, and Customers****Leadership***Senior Leadership*

Client ABCs' senior leadership team includes the founder who is also the executive director and chief executive officer, director of organizational operations, director of organizational development, program director, director of workforce development and social enterprise, director of leadership and engagement, and the director of public art and community service. The executive director of Client ABC has served in this capacity since 2000. The board of directors consists of talented and enthusiastic leaders of businesses, philanthropy, and the community who are selected based on their ability to align and support Client ABC's mission, professionally contribute to the organization, advise the executive director, and provide overall guidance

and overall governance for the organization through the formulation of policies. Founded in 2000, the executive director and board of directors defined the mission for Client ABC.

The senior leaders of Client ABC are responsible for the overall performance of the organization and adherence to the organization's mission, organizational goals, and values. The senior leaders deploy the company's mission, goals and values to their customers by using the company's website, company's newsletters, and scheduled meetings with their employees and community partners. The senior leaders create and promote a positive work environment that allows all employees to contribute to the organization's success by getting engaged and openly providing feedback and recommendations for process and performance improvements. This approach allows the leaders and other employees to analyze processes and capture what works well and needs improvement. Leaders conduct annual reviews to assess the adherence to the mission and behaviors annually during the performance review process. The senior leaders promote an inclusively diverse organization that allows the staff to provide program services in a culturally diverse community.

### ***Governance and Societal Responsibilities***

Senior leaders of Client ABC are committed to and responsible for the organization's governance by focusing on the interests of the community, stakeholders, participants, suppliers, customers, senior leaders, and donors. The board of directors approves ABC's annual budget and provides fiscal oversight to ensure financial stewardship. The board of directors and other senior leaders meet quarterly to discuss Client ABC policies, exiting and potential community projects, and business operations.

The board of directors might meet more frequently if concerns and issues arise concerning Client ABC's policies, treatment of staff, community programs, legal or compliance requirements, and ethical behavior within the organization and with its stakeholders. The executive director also meets monthly with the president of the board of directors to discuss the operations of Client ABC. The senior leaders of Client ABC meet weekly with employees to ensure organizational policies and processes are followed, discuss any ethical issues, or concerns with the working environment. The senior leaders established an employee handbook that addresses topics such as employment relationship, nondiscrimination policy, non-harassment policy, and other rules and policies that employees need to respect to be an employee of Client ABC. To ensure ethical behavior and compliance with any regulations, senior leaders require two adults to be in the classroom when children and young adults are present. The senior leaders conduct cultural retreats for all employees to discuss policies, projects, the work environment, ethical concerns, and other concerns and recommendations for Client ABC.

The senior leaders believe in a culture that promotes and supports the value of treating people in the manner in which you want to be treated. The executive director creates and supports an environment of trust, transparency, honesty, and integrity that allows senior leaders to be transparent and honest to all employees and stakeholders. The executive director uses an open approach to listen to people's concerns and immediately address those concerns to minimize any adverse impacts on the operations of the business. The executive director and senior leaders use an open and honest approach to address employees' issues and use these issues as an opportunity for the organization to

excel in legal and ethical behavior. The executive director establishes a safe and positive work environment that supports the staff, promotes employee satisfaction about what they are doing, indicates a purpose for their contributions to the organization's mission and fulfills the employees' needs. The senior leaders promote ethical behavior through Client ABC policies, team building workshops and events, and performance reviews.

**Societal Well-Being.** Within the mid-Atlantic region of the United States, Client ABC is an organization that provides equitable access to the arts for underserved, low-income, and vulnerable communities. The senior leaders of Client ABC obtain feedback from community partners, program participants, customers, and stakeholders to address the societal well-being of their stakeholders. To demonstrate the commitment to societal well-being as a priority for Client ABC, the senior leaders partner with organizations such as community centers, group homes and treatment centers, local veterans center, shelters, transitional and low-income housing, academic institutions, religious organizations, and public and government officials to ensure the societal well-being of their stakeholders. The senior leaders respect and adhere to any societal requirements of the organizations and stakeholders. To ensure the societal well-being of the stakeholders are met, the senior leaders solicit and request their support for activities that support their community and other stakeholders.

**Performance Evaluation.** In Client ABC, the board of directors assesses the chief executive officer. Within the last year, the board conducted a formal, written assessment of the chief executive officer. The board members attend a board member orientation program and receive a board member handbook when they join that describes

their roles and responsibilities. The board of directors conducted a formal, written self-assessment of its performance within the past three years. If board members are not performing, the president of the board of directors sends a letter to the board member to remove themselves from the board. The executive director conducts an annual performance evaluation to review the performance of the directors. The executive director also conducts performance reviews on the directors during meetings and as needed.

## **Strategy**

### ***Strategy Development***

The executive director of Client ABC and the board of directors are the key participants who complete the organization's strategic plan to ensure continued focus on the vision and mission of the organization. During the strategic planning process, the executive director and board of directors discuss and define organizational goals and address any key strategies. The 1-year strategic plan helps the senior leaders to develop the organization's strategic initiatives to support the organization's mission. The executive director and board of directors conduct a systematic approach to the strategic planning of identifying and focusing on 1-year objectives. The executive director and board of directors schedule meetings to discuss the organization's goals, commitments, and key processes. The board of directors is actively involved in the strategic planning process through annual retreats and scheduled and nonscheduled meetings as necessary with the executive director. The executive director and board of directors complete a yearly strategic plan to identify the organization's needs, focus on the requirements of the



community partners and stakeholders, identify any meaningful measurements to monitor, and report performance outcomes and improvement.

### ***Strategy Implementation***

During the strategic planning meeting, the executive director and board of directors discuss required action plans that include resources, timelines, and capital and budgetary needs. The senior leaders of Client ABC ensure action plans are implemented to support the community partners, stakeholders, and the organization's mission. The senior leaders of Client ABC conduct scheduled meetings or as necessary to address any action plans and process or program adjustments to support the organization's mission and stakeholders' requirements. The senior leaders of Client ABC track and monitor performance metrics, program requirements, and budgetary requirements to ensure the action plans determined during the strategic planning meeting are effective.

### **Customers**

#### ***Voice of the Customer***

The senior leaders of Client ABC rely on the voice of the customer to provide customer feedback, customer experience, and satisfaction about the organization's programs and services. The senior leaders, teachers, and staff listen to the customer through daily, weekly, and monthly meetings, feedback, exit interviews, daily interactions and conversations, and online surveys. Customers also interact and provide feedback through social media and Client ABCs' website.

To meet the community partners' expectations, the senior leaders communicate with the stakeholders about the organizations that need Client ABC program services to

provide services to homeless youth, seniors, school children, and other individuals who might benefit from ABC's programs and services. The senior leaders also determine the preferred scheduling times and the specific required curriculum the community partners want to ensure the leaders of Client ABC can deliver and meet their expectations. The senior leaders of Client ABC establish an initial meeting to discuss the community partners' expectations and then continue communications through random and periodic check-ins, monthly site visits, emails, phone calls, periodic meetings, and one-on-one conversations with principals, site coordinators, and other stakeholders. The senior leaders of Client ABC conduct meetings during the beginning of the year and end of the year with the community partners to determine if they are meeting the customer expectations and solicit any feedback to improve the effectiveness and efficiency of the program and processes.

**Customer Engagement.** The senior leaders use customer engagement to build relationships with customers, enhance customer loyalty, and build a more customer-focused culture (Baldrige Performance Excellence Program, 2019). Client ABC gains and sustain customers using word-of-mouth, social media, newspapers, customer recommendations, partnerships, television programs, web-based technologies such as the organization's website and YouTube, and organization newsletters. This approach of using different resources to retain and gain customers helps the senior leaders to learn the expectations of potential customers. The senior leaders review and share this information from these resources with the employees. The senior leaders benefit from learning related to these deployments and uses this information to update and improve their processes to

meet customer demands. The senior leaders engage donors and other organizations by providing newsletters and information on the organization's website.

The senior leaders of Client ABC provide onsite teacher evaluations to school principals and community partners to get feedback on their satisfaction, effectiveness, and efficiency of the program. The senior leaders share customer feedback results to the employees to ensure integration and transparency for continuous process improvement opportunities. Also, the feedback from the customers allows the employees to learn about any customer issues that might help them refine any approaches to their company's processes or make improvements to be more effective in meeting the customers' demands. The senior leaders might receive complaints through e-mail, phone calls, or scheduled meetings. Senior leaders immediately handle complaints with one-on-one conversations with the community partners to ensure their needs are met and any improvements are considered and implemented.

### **Results Triad: Workforce, Operations, and Results**

#### **Workforce**

##### ***Workforce Environment***

The senior leaders of Client ABC believe their employees are critical to the organization's success. The executive director and other senior leaders of Client ABC have established a positive and supportive climate for the workforce. The leaders have established a framework for new employee orientation, communication, meetings, and performance evaluations. The senior leaders assess the capability of the workforce through the review of prior experience and job-related skills.

The senior leaders determine if the workforce has the appropriate skills and competencies to meet the requirements for the specific roles and responsibilities to support the stakeholders' requirements and Client ABC's mission. The senior leaders recruit and hire employees for Client ABC on an as-needed basis depending on the number of community partners the organization supports. The executive director of Client ABC hires the directors, and the directors hire the employees who work for them. The leaders of Client ABC have established clearly defined job descriptions, roles, expectations, and competencies of the employees needed to support the organization's mission. The executive director of Client ABC has created a positive work environment by allowing the employees to openly talk to her or the directors about any concerns they have with their job responsibilities.

The senior leaders of Client ABC provide employees a program that offers individual health insurance and the organization pays one-half of the monthly premium for the employees electing coverage through the plan. The senior leaders provide a Simple IRA retirement program for eligible full-time employees. The employees' workweek consists of a standard five, eight-hour days with a set schedule, and some work on weekends based on the needs of the community partners. The senior leaders of Client ABC provide full-time employees with benefits such as paid holidays, vacation time, sick time, maternity/paternity leave, and compassionate leave. The senior leaders create an environment of a family that allows employees to communicate using phone text during and after work and communicating openly about family successes and events. The senior leaders ensure all workers are treated fairly and with dignity and respect.

### ***Workforce Engagement***

The senior leaders of Client ABC support workforce engagement by soliciting feedback from the workforce, conducting check-in meetings with the employees, conducting on-site visits with the community partners, and establishing open lines of communication for employees to discuss concerns, recommendations, and improvements to support Client ABC's mission. To sustain workforce engagement, the senior leaders have biweekly staff meetings and engage external facilitators on a bimonthly basis to help employees learn more about each other, address concerns, solutions, and program and process improvements.

To reward employees for workforce engagement, the senior leaders of Client ABC provide employees with annual cash bonuses, salary increases, an annual staff retreat, and a half-day off from work on Fridays before holidays. The learning and development system consist of the employees attending conferences and monthly professional development workshops. The senior leaders of Client ABC pay the expenses for the conferences to assist the employees in improving their job skills or learn new job skills to support the organization. In Client ABC, if positions become available, the senior leaders consider the teachers and interns as potential candidates to fill the open job positions.

### **Operations**

#### ***Work Processes***

Workforce processes for Client ABC consist of fundraising activities, recruitment of volunteers and teachers, and variability in customer expectations based on the required

program. Because the workforce processes vary according to the different types of programs offered to the community partners, the senior leaders of Client ABC do not have a systematic, structured process requirement program. To ensure the senior leaders meet Client ABC's mission requirements, the senior leaders conduct organizational activities such as ensuring the proper implementation of the curriculum appropriate for each program, the purchase of an adequate and correct amount of supplies, performance evaluation of the program, collaboration and communication with community partners and local on-site visits. The senior leaders of Client ABC plan and deliver the specific programs based on the needs of the community partners and stakeholders. To conduct financial stewardship and remain within the limitations of the organization's board-approved budget, only one person within Client ABC can purchase certain materials and all other orders are purchased by the deputy director. The senior leaders recruit for volunteers and teachers based on the needs of the community partners and stakeholders. The senior leaders evaluate and determine the best work processes needed to help achieve Client ABC's mission. The senior leaders establish work process improvements based on feedback from the community partners and stakeholders.

### ***Operational Effectiveness***

The senior leaders of Client ABC believe operational effectiveness is critical to the organization's success. The executive director of Client ABC and the board of directors establish an annual budget to sustain operations and manage expenses within the organization. The senior leaders of Client ABC are responsible and held accountable for overseeing operations within the budget. To maintain operations and support Client

ABC's mission, the executive director and senior leaders of Client ABC continuously provide information on their services and programs to secure funding. The executive director and senior stressed the importance of remaining within the budget because the programs are funded primarily by donations.

The senior leaders of Client ABC are responsible for hiring qualified and skilled employees who can support the organization's mission. To ensure operational effectiveness, senior leaders and employees attend conferences and meetings to continue their education and effectiveness to deliver an effective program to the community partners and other stakeholders. The senior leaders engage the workforce and community partners and evaluate the programs of Client ABC to ensure the employees deliver a quality product.

The senior leaders of Client ABC ensure the organization complies with the minimum regulatory standards for workforce and workplace safety. The employees use their individual user ID and password for their computer system. The senior leaders and employees of Client ABC do not access sensitive data, however, computers and mobile devices that contain sensitive data must be encrypted. To prepare for emergency preparedness, senior leaders of Client ABC ensure they meet local and state safety requirements by ensuring fire extinguishers are present and operational, fire alarm systems are working properly, and sprinklers are operational. Client ABC has an insurance policy to protect the organization if the leaders experience damages or disruptions due to emergencies or disasters.

During the COVID-19 pandemic, the senior leaders continued to operate to limit disruptions of serving their community partners. The senior leaders of Client ABC adhered to the state of emergency requirements of their city and state. The senior leaders ensured the employees vacated the building, worked remotely from home, and conducted most of their services online. The leaders ensured some training was conducted at physical locations if the building and environment were safe for the workforce, social distancing was appropriate, and personnel were available to properly sanitize the operational areas.

### **Measurement, Analysis, and Knowledge Management**

#### ***Measurement, Analysis, and Improvement of Organizational Performance***

The senior leaders of Client ABC have an effective approach to collect, analyze, and measure company data. The senior leaders collect and report work performance and evaluation to show the company's performance at reliable and successful levels to help them continue business operations. The senior leaders report performance measurement information to the employees and stakeholders to show the performance of the company's programs.

#### ***Information and Knowledge Management***

The senior leaders of Client ABC collect and track performance data on daily operations and overall organizational performance to help them build knowledge and make reliable decisions. The senior leaders review financial reports; information discussed in daily, monthly, and quarterly meetings; online evaluations; feedback from employees, program participants, and community partners to help them collect and track



performance data. The senior leaders of Client ABC use comparative data from within the organization such as information from prior online surveys and feedback from community partners and stakeholders to support their fact-based decisions making. To build organizational knowledge, senior leaders of Client ABC use word-of-mouth communications, community events, conference and training events, and information on the organization's website. The senior leaders provide an orientation session for newly hired employees to train the newly hired employees on the organizational policies and procedures. The executive director of Client ABC provides financial and performance data to the board of directors on a quarterly and annual basis to inform board members of the organization's performance.

**Performance Improvement.** Business leaders conduct an analysis of their organization's performance to determine actions for better performance that provides better quality from the customers' perspective and better financial and operational performance from the stakeholders' perspectives (Baldrige Performance Excellence Program, 2019). By relying on meetings with employees, community partners, and stakeholders, and feedback from customer emails, phone calls, and online evaluations, the senior leaders of Client ABC use information from community partners, program participants, directors, and other stakeholders to determine opportunities for process improvement. The senior leaders track data and information manually on spreadsheets and use Gantt charts to help leaders better design program scheduling. The senior leaders of Client ABC use the analysis of the information on the spreadsheets to help make decisions for future performance, improved customer satisfaction, and better performance

to secure funding from donors. The information from the analysis of data that might indicate opportunities for improvement is shared with the senior leaders and employees of Client ABC during daily, weekly, bi-monthly, quarterly and annual meetings.

### **Collection, Analysis, and Preparation of Results**

#### **Thematic Findings**

The purpose of this qualitative single case study was to explore successful strategies leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. The overarching research question was: What strategies do you use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for your nonprofit organization? For this study, I collected data from semistructured interviews, organizational documents, the organization's website, and public documents. The data were thematically analyzed for themes as: (a) meaningful measurements, (b) employee engagement, and (c) stakeholder demands. The themes support the need of nonprofit leaders to understand and apply the stakeholder theory as a principle to successfully obtain and sustain funding for their company. The summaries of each theme that emerged from the analysis of data is discussed below.

#### ***Thematic Findings 1***

One of the key themes that emerged from the analysis of the data is the requirement for the senior leaders of Client ABC to collect, track, and report meaningful measurements to support the stakeholder's requests to obtain funding. The senior leaders

stressed the need to develop quantitative and meaningful performance measurements because the stakeholders are requesting data to support the company's request for funding. The senior leaders identified key metrics and strategies they currently use to provide information about the company's programs and successes. The senior leaders understand the need to meet the stakeholders' demands for the company to obtain and sustain funding for their business operations. The strategies to provide the stakeholders with key information about the company's programs and successes align with the stakeholder theory framework as a tool to understand the importance and significance of meeting stakeholders' demands. The senior leaders are aligned with the Juran trilogy that supports quality measurements to support organizational effectiveness.

### ***Thematic Findings 2***

The employees are engaged in the company's success, process, and program improvements. Senior leaders explained the theme of employee engagement was a major factor in the company's success to provide programs to support the community partners and stakeholders. The senior leaders provide immediate feedback on any issues and solicit ideas from their employees to improve the company's programs' effectiveness and efficiencies. The senior leaders use this approach of employee engagement as a learning of process and program improvement is important to the company's current and ongoing business operations. The senior leaders stressed the importance to share performance data to the employees to ensure they are engaged in the integration of key work processes for continuous process improvement opportunities. The theme of employee engagement is aligned with the stakeholder theory because the employees of the company are also

stakeholders who are important to the company's success. The senior leaders' approach to support employee engagement supports helps the leaders to improve their quality of program services which is aligned with the Juran trilogy principle of quality improvement.

### ***Thematic Findings 3***

Another key theme that emerged from the analysis of data is the importance of the stakeholders' demands. The senior leaders explained their role in meeting the stakeholders' demands to gain and sustain their support to provide necessary programs to the company's community partners. The stakeholders who provide funding are requesting additional information from the leaders to support the programs' effectiveness and efficiency. The senior leaders understand the need to meet the stakeholders demands as part of their leadership responsibilities. The senior leaders understand the need to build relationships with stakeholders to ensure the leaders use the correct approach of providing reliable information to secure funding. This theme is aligned with the stakeholder theory because the senior leaders believe the stakeholders might have an influence on the number of company programs offered to their customers.

### **Product and Process Results**

Client ABC is a nonprofit organization operating in the mid-Atlantic region of the United States for over 19 years. The organization provides engaging, educational, and interactive visual arts classes to underserved children, youth, and adults in schools, group homes, shelters, community centers, recreation centers, foster care agencies, senior facilities, and hospitals. The senior leaders of Client ABC help to connect the young

people with stable, nurturing, and supporting adults who can inspire and direct students to reach their fullest potential. The senior leaders of Client ABC provide a variety of programs to cultivate positive, long-lasting changes in the lives and communities of its students. The senior leaders of Client ABC have increased the number of classes being offered to the community from four classes to over 12,000 classes annually. The leaders are exploring strategies to identify and implement meaningful measurements to secure funding for their organization.

The senior leaders of Client ABC are emerging to apply measures of progress to help them evaluate, improve, and innovate processes and products, in alignment with the organization's mission. The senior leaders measure the success of their programs by: (a) total number of classes offered, (b) the number of service recipients who are employed, (c) the number of direct care staff who received training in trauma informed care, (d) the number of youths who volunteer or participate in community service, and (e) percent of students who get hired for employment. These key performance indicators are tracked daily, monthly, quarterly, or annually, as appropriate to provide an analysis of the company's performance. From this analysis, the employees can take corrective action at the tactical level to develop action plans or integrate any process improvements to better serve the customers or meet the company's goals. Senior leaders of Client ABC faced challenges in identifying quantitative performance measurements for stakeholders to help the leaders identify how effective and efficient Client ABC's programs are to the participants of the program.

The senior leaders of Client ABC collaborate and work closely with various community partners and stakeholders to determine the required programs needed to meet the expectations, needs, and desires of the population being served. The leaders have provided individual art experiences to children, youth, and adults in the mid-Atlantic region and art creations for the local communities. In 2019, the participants of Client ABC programs completed 39 public art installations including 22 mosaic murals, six painted murals, and 11 mixed media murals. Client ABC's leadership team has constantly shown positive trends in the company's performance of providing individual art experiences and art creations to their community partners. The performance of Table 4 depicts the individual art experiences and creations for Client ABC since 2015. The senior leaders of Client ABC have continued to provide visual art classes to meet the demands of the community partners.

Based on the continuous support from volunteers, staff, and teachers, Client ABC's leadership team has provided an average of over 12,000 classes on an annual basis to their community partners with a positive trend over the last five years from 2015 to 2019. The integration of volunteers has allowed the senior leaders to provide increasing support to their community partners. Table 5 depicts the number of classes conducted by Client ABC on an annual basis.

In 2019, 107 students completed Client ABC's workforce development program with a 75% job placement rate. The senior leaders of Client ABC have been successful in meeting their goal of 75% job placement rate for the last two years with a positive trend from 2015 to 2019. The senior leaders ensure the integration of students in a work setting

to prepare them for jobs placement with companies within the community and outside the community. Table 6 depicts the percentage of graduates in Client ABC's leadership program who graduated from the program with a job in place.

**Table 4**

*Total Number of Individual Art Experiences and Art Creations*

Year	Individual art experiences	Art creations
2019	301,705	39 public art installations to include 22 mosaic murals, 6 painted murals, and 11 media murals.
2018	260,130	27 large installations to include 10 large scale mosaic murals and 300 beautification projects.
2017	260,130	16 public art installations to include 16 large scale mosaic murals
2016	210,000	8 public art installations to include 111 mosaic murals.
2015	160,000	10 public art installations to include 13 mosaic murals.

**Table 5***Total Number of Classes Conducted Annually*

Year	Total classes conducted
2019	12,070
2018	14,814
2017	11,984
2016	11,600
2015	10,000

**Table 6***Percentage of Participants Who Graduated from Program with a Job in Place*

Year	Percent graduated
2019	75
2018	79
2017	70
2016	73
2015	70



**Customer Results**

Senior leaders of Client ABC obtain daily and weekly evaluations from the community partners and program participants. The senior leaders track and assess customer satisfaction and dissatisfaction from information provided on the evaluations. The senior leaders of Client ABC also engage with customers at the on-site location and through random observations to ensure the customers' needs and expectations are met.

To ensure the customers' voice is heard, the senior leaders use platforms like Facebook, Instagram, Twitter, and the organization's website to engage with customers to address concerns or receive recommendations for improvement. The senior leaders of Client ABC listen and interact with the community partners and stakeholders to obtain actionable information to better serve the needs and meet the expectations of the customers. The senior leaders determine if the customer is satisfied by interacting with the customers using email, phone calls, site visits, and teacher evaluations. Through word of mouth and social media postings, senior leaders of Client ABC hear and see information from customers about the satisfaction and effectiveness of the organization's programs.

**Workforce Results**

The senior leaders of Client ABC are committed to an engaging and positive workforce. The senior leaders do not have a formal evaluation system to track the satisfaction and dissatisfaction of their employees. The senior leaders realized they experience low turnover, and the employees are engaged in the operations and success of the organization. The executive director and senior leaders of Client ABC supports an

environment that constantly informs the employees how important their role supports the mission to enhance the lives of people in need of their services. The senior leaders promote an environment of purpose for their employees which keeps them engaged to ensure the programs are successful and meaningful.

The senior leaders assess the workforce capability and capacity based on the type and number of programs needed to service its community partners and stakeholders. The senior leaders of Client ABC have increased and achieved the number of volunteers to approximately 5,000 to meet the needs and demands of their community partners and stakeholders. The senior leaders continue to assess the capability and capacity of Client ABC's workforce to meet the desired skills and staffing to support the organization's mission and demands of the community partners and stakeholders. Client ABC leaders have been successful in obtaining a positive trend in the number of volunteers for the last five years from 2015 to 2019. Table 7 depicts the number of volunteers who supported Client ABC's programs.

**Table 7***Number of Volunteers Who Participated*

Year	Total volunteers
2019	5,000
2018	5,000
2017	5,000
2016	4,500
2015	4,000

**Leadership and Governance Results**

The executive director of Client ABC is responsible for the operation of the business, supervision of the business, and implementation of established policies. The board of directors is responsible for providing oversight over Client ABC's operations and formulate sound, ethical, legal governance, and financial management policies to assist the senior leaders in operating the organization. The executive director of Client ABC is responsible for complying with tax regulations, disclosing financial statements, and filing the IRS Form 990. The board of directors and leaders of Client ABC must adhere to the bylaws, principles, and any other written policies designated by the board of directors. The executive director and board of director members meet quarterly and annually to discuss the organization's performance, program activities, and issues with the organization or programs.

The senior leaders of Client ABC adhere to regulatory requirements based on the requirements of a licensed nonprofit organization. The senior leaders of Client ABC receive an annual external audit to ensure regulatory and ethical requirements are met according to state and local laws. The senior leaders of Client ABC have established processes to ensure ethical dealings with internal employees and stakeholders. The senior leaders of Client ABC have received no ethical complaints or litigation since the organization was established.

### **Financial and Market Results**

The executive director of Client ABC reviews the organization's financial results monthly with the board of directors to determine the progress or capability to meet the organization's goals and mission. The senior leaders of Client ABC also review the organization's financial results monthly to determine what resources and programs are available to support the demands and needs of the community partners and stakeholders. The executive director and board of directors have clearly defined the measures or indicators for measuring the financial performance of the organization. The senior leaders of Client ABC had a revenue budget of \$1,527,000 in 2019, of which they achieved 100% of the target. In 2019, the senior leaders of Client ABC received \$580,600 from contributions, grants, and gifts, and \$256,500 was received from the program services. The senior leaders of Client ABC monitor the funds available for the implementation of the programs and seek funds from donors, grants, and partnerships to help meet the needs and demands of the community partners and stakeholders. Table 8 depicts Client ABC's revenue and expense data for the fiscal year 2019.

**Table 8***2019 Financial Data*

Revenue	
Contributions, Grants, Gifts	\$580,600
Program Services	\$256,500
Membership Dues	\$0
Special Events	\$0
Other Revenue	\$60,000
<b>Total Revenue</b>	<b>\$1,527,100</b>
Expenses	
Program Services	\$0
Administration	\$0
Fundraising	\$0
Payments to Affiliates	\$0
Other Expenses	\$0
<b>Total Expenses</b>	<b>\$1,527,100</b>

**Key Themes**

The key themes derived from the examination of the senior leaders of Client ABC consisted of process strengths, process opportunities, results strengths, and results opportunities. These key themes were determined after using the 2019-2020 Baldrige Excellence Framework. I used four factors to analyze the key themes: (a) approach, (b) deployment, (c) learning, and (d) integration. The key themes consist of: (a) meaningful measurements, (b) employee engagement, and (c) stakeholder demands.

***Process Strengths***

The senior leaders of Client ABC have designed many effective processes to meet the needs of the community partners and stakeholders. The senior leaders have designed an effective and efficient process to engage with their community partners and

stakeholders to determine and meet their needs. The senior leaders have established effective processes to hear the voice of the customers, identify process improvements, and implement those improvements to meet the customers' needs. The senior leaders have established processes to support the workforce, suppliers, partners, collaborators, and stakeholders. The senior leaders have established processes to engage their employees in providing feedback, solutions, and recommendations to improve the delivery, effectiveness, and efficiency of the program.

The senior leaders of Client ABC have established processes to properly manage the allocation of resources for the effective implementation of the programs. The leaders have established processes to effectively solicit volunteers to meet the needs of the community partners and stakeholders. The senior leaders have established effective processes to design, deliver, and assess the programs to meet the customers' needs and align with the organization's objectives. Senior leaders have established effective processes to build relationships with community partners, donors, and other stakeholders that contribute to the organization's success. Senior leaders established effective processes for workforce and workplace safety, a positive working environment, and performance improvement.

### ***Process Opportunities***

The senior leaders of Client ABC have established many effective processes to support the organization's mission. The senior leaders should consider establishing processes to systematically determine satisfaction, dissatisfaction, and engagement of employees, community partners, and stakeholders. Senior leaders have realized

employees feel a sense of purpose within the organization but should consider establishing processes to manage succession planning of the workforce for key positions within the organization. The board of directors conducts a self-evaluation of their performance. The senior leaders should consider engaging an external party to conduct an evaluation of the board of directors to ensure transparency and stewardship. accountability, and financial stewardship.

### ***Results Strengths***

Business leaders of nonprofit organizations face challenges with identifying and implementing meaningful measurements to demonstrate their organization's operational effectiveness. The senior leaders of Client ABC have successfully established measures to assess their performance. One of the results strengths of the senior leaders of Client ABC is the achievement of enhancing the lives of people in need within the mid-Atlantic region. The senior leaders have successfully executed all programs requested by the community partners and stakeholders. The senior leaders have been successful in soliciting the right number of volunteers and teachers to support the community partners and stakeholders. The senior leaders of Client ABC have been successful financial stewards by not exceeding the budget and properly allocating resources to support the organization's mission.

The senior leaders' decision to use social media, the organization's website, and word of mouth to engage customers has been effective in providing feedback to the senior leaders for process and program improvement. The senior leaders of Client ABC monitor the organization's climate that has resulted in employee engagement and low

turnover. The senior leaders of Client ABC have been successful in achieving a 75% success rate job placement for participants attending one of the offered organization's programs. The positive impact of Client ABC's positive change programs is realized by families and community partners because the youth and adults develop skills and confidence to reach their full potential.

### ***Results Opportunities***

Senior leaders of Client ABC face challenges in identifying performance measures or indicators to track the effectiveness and efficiency of their programs. The senior leaders acknowledge the lack of performance measurements to quantify the programs' efficiency and effectiveness that is important to stakeholders. The senior leaders have evaluation tools to determine the satisfaction of the community partners and stakeholders but should consider an evaluation tool and target for internal satisfaction. Senior leaders do not use comparative data from other nonprofit organizations as a source of competitive and comparative data. The senior leaders of Client ABC should consider reviewing comparative and competitive data from other nonprofit organizations to determine meaningful measurements, best practices, and program and process improvements.

### **Project Summary**

In this qualitative single case study, I explored the strategies senior leaders of Client ABC used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. Business leaders face increasing pressure from stakeholders to



demonstrate their effectiveness and accountability through performance measurement (Velli & Sirakoulis, 2018). Leaders of nonprofit organizations use performance measurements to identify where to make improvements and to ensure their processes and programs are effective and efficient (Moura et al., 2019). If business leaders are unable to provide meaningful measurements to their stakeholders, the business leaders might face challenges to obtain and secure funding for their organization.

For this study, I used a nonprofit organization located in the mid-Atlantic region of the United States of America. The conceptual framework used for this study was the stakeholder theory augmented by the Juran trilogy. I used the 2019-2020 Baldrige Excellence Framework as my template to examine Client ABC's organizational environment, organizational relationships and situation, leadership, customer, workforce, operations, measurement analysis, and knowledge management. Within this study, I collected data from semistructured interviews, Client ABC's internal documents, Client ABC's website, public documents, academic literature, regular communication with the executive director of Client ABC, and GuideStar.

Business leaders of nonprofit organizations can use the data from this qualitative single case study to identify strategies to evaluate their organizational performance, increase their revenue, obtain additional funding sources, successfully sustain their operations, and effect social change that can benefit their communities. Business leaders of nonprofit organizations can use the Baldrige Criteria for Performance Excellence to examine the effectiveness of their organization and to improve their results and operational outcomes. Business leaders of nonprofit organizations who identify and

implement meaningful measurements for their organization might increase the organization's opportunity to sustain and maintain constant funding.

### **Contributions and Recommendations**

The results from this study might provide business leaders with strategies to identify and implement meaningful measurements to improve and sustain funding. Business leaders might use meaningful performance measurements to quantify the efficiency and effectiveness of their organization (Star et al., 2016). Stakeholders who provide funding to leaders of nonprofit organization demand to know the status of the organization's quality of provided services and accountability measures (Becker, 2018). This study might benefit business leaders of nonprofit and for-profit organizations in improving the effectiveness of their organization and opportunity to sustain funding by using the Baldrige Performance Excellence Program. This study might provide business leaders with strategies to help build relationships with stakeholders to retain and sustain funding for their organization.

I recommend the senior leaders of Client ABC continue to keep their employees engaged in the quality management and improvement process to support their community partners and stakeholders. The business leaders and employees need to understand that quality management is crucial for increased organizational performance and the continued success of their organization (Mas-Machuca et al., 2020). The senior leaders understand the importance of building relationships with stakeholders so the senior leaders should continue to meet their stakeholders' needs in providing meaningful quality

and performance measurements to demonstrate the value and importance of their organization to the mid-Atlantic region.

To the academic community, I recommend that researchers explore how leaders of nonprofit organizations use the stakeholder theory and Juran trilogy to demonstrate their programs' effectiveness and efficiency to secure and sustain funding from their stakeholders. Stakeholders demand that leaders of nonprofit organizations are accountable for their organization's success, initiate high quality and transparency standards for their program services, and improve their quality management program (Becker, 2018). Researchers should continue to explore the different measurements that stakeholders demand from the leaders of nonprofit organizations to sustain funding for their organization's future success.

### **Application to Professional Practice**

The findings of this doctoral study contribute to improved business practices because the success of the organization is dependent on the identification and implementation of meaningful measurement strategies that help leaders determine their organizational performance, gain financial support, and meet stakeholders' demands. Stakeholders who provide funding for nonprofit organizations might require different types of performance and measurement data from the leaders of nonprofit organizations that might influence the stakeholders' willingness to support the organization (Moura et al., 2019). Leaders of nonprofit organizations face challenges with fund raising and require performance measurements of effectiveness to be able to maximize their resources (Haber & Schryver, 2019).

When leaders identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness, the leaders can accurately evaluate the organization's performance, provide relevant information to stakeholders, and gain financial support from stakeholders to continue operations. The identification and implementation of meaningful measurements also help leaders to retain donors, obtain additional funding sources, improve organizational performance, and establish programs and processes to meet stakeholders' demands and expectations.

### **Implications for Social Change**

The results of this study contribute to social change by providing leaders of nonprofit organizations with strategies to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. The implications for social change from the findings of this study also include motivating local business leaders to learn and implement strategies to improve and sustain funding from stakeholders that might lead to the organization's ability to effectively serve their community. Leaders of nonprofit organizations can educate local community leaders on the impact of the effectiveness of performance measures in helping them retain stakeholder support and funding for long-term funding support for community services.

The identification and implementation of meaningful measurements help the leaders to sustain future operations. These strategies can help leaders of nonprofit organizations increase their capacity and capability to provide extensive community support because of their increased funding for additional programs and services to the

community partners and stakeholders. Senior leaders can significantly impact societal well-being because they are identifying and implementing meaningful measurements that will provide the most efficient and effective quality programs and processes to enhance the lives of the community population.

### **Recommendations for Action**

The results of this study, when disseminated through academic literature, conferences, and training workshops, might provide leaders of nonprofit organizations with strategies to identify and implement meaningful measurements to secure and sustain funding. I recommend the senior leaders of Client ABC use the Baldrige Performance Excellence Program and Criteria as a model to assess their organization's strengths and opportunities for improvement. The senior leaders of Client ABC might review competitive and comparative data of other nonprofit organizations to identify meaningful measurements for their organization.

I recommend that the senior leaders develop and maintain a performance measurement system that encompasses key performance indicators, and purpose, description, and expectations of the performance measurement and track and review performance data no longer than 90 days. I recommend that the senior leaders identify key performance indicators and critical success factors to ensure processes are in place for long-term survival. I recommend the senior leaders track and review performance measurements such as: (a) repeat customers, (b) internal and external customer satisfaction, (c) school graduation status of participants, and (d) academic performance before and after the program. I recommend the senior leaders of Client ABC track and

review quality measurements such as: (a) student attendance before and after the program, (b) student discipline before and after the program, and (c) aptitude or educational test scores before and after the program.

I recommend the senior leaders invest in an information management tool such as a data dashboard and software to adequately support digital visualization to help them communicate their message to stakeholders. Based on the demand of the stakeholders to understand the program and process effectiveness and efficiencies and outcomes, I recommend the performance measurements are outlined in the strategic plan and are evaluated annually or as needed.

The senior leaders of Client ABC might also solicit recommendations from the stakeholders to ensure their expectations are met. Client ABC has continuously increased the number of community partners and stakeholders they serve, so I recommend someone on the staff is dedicated to developing the performance measurement system to ensure the organization has the appropriate meaningful measurements need for expansion and future operations.

### **Recommendations for Further Research**

The study limitation was that I explored the experiences of one nonprofit organization from the mid-Atlantic region of the United States of America and did not obtain the experiences from leaders of other nonprofit organizations. I recommend researchers consider the use of multiple case study design to determine strategies leaders use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's

missions. The use of multiple case study design help researchers to gain a broader understanding of the strategies leaders of nonprofit organization use to identify and implement meaningful measurements. I recommend a mixed method case study design in future studies to facilitate the integration of qualitative and quantitative performance measurements.

I recommend researchers explore if the stakeholders expect the performance measurements to be the same or similar for nonprofit organizations and for-profit organizations. The stakeholder's expectations might provide a great perspective on the performance measurements leaders of nonprofit organizations should use to meet stakeholder demands and secure funding. Also, for future research, I recommend researchers consider exploring if stakeholders expect leaders of nonprofit organizations to manage their organization's performance in the same manner as a for-profit organization. This research might provide information on the stakeholder's perception of a nonprofit organization in comparison to a for-profit organization.

### **Reflections**

I faced challenges completing the doctoral research, but the process was rewarding. Based on the research, I reviewed many strategies and ideas for the doctoral study. I faced challenges with time management, personal and family sacrifices, and willingness to stay engaged. The reward was having the opportunity to communicate with Client ABC's founder and executive director to discuss how the business was being run daily. The executive director was flexible with her schedule and allowed for open dialogue when conducting the research. The experience I gained through this process was

an appreciation and understanding of research at the doctoral level, the importance of synthesis during the research process, and the positive impact leaders of nonprofit organizations contribute to their communities. The doctoral study helped me to understand the importance of leaders' systematic processes to identify and implement meaningful measurements to secure funding and meet stakeholder's demands.

### **Conclusion**

The objective of my research was to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions. Based on the research, leaders of nonprofit organizations use key performance indicators, critical success factors, and other performance measurements to provide evidence of their organization's operational effectiveness and efficiency. Leaders of nonprofit organizations depend on funding from donors and other stakeholders to continue operations, so they are constantly evaluating performance measurements to meet stakeholder demands and expectations. For leaders of nonprofit organizations to sustain operations in the future and maintain a competitive advantage, leaders will have to focus on identifying and implementing meaningful measurements to secure funding, maintain long-term funding sources, and survive in their industry.



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### Appendix: Interview Protocol

Interview Title: Exploring the Strategies used by Leaders of Nonprofit Organizations to Identify and Implement Meaningful Measurements for Nonprofit Organizations

RQ: What strategies do leaders in nonprofit organizations used to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for their organization's missions?

Initiate the interview protocol when I sit down to meet with the client leader.

1. I will start the interview by introducing myself and state the purpose of the interview.
2. The participant will be provided with an informed consent form prior to the interview and provide their consent, agreeing to participate in the doctoral research study.
3. I will thank the participant for agreeing to participate in the study, his or her time allocated for the interview, and for consenting to the interview.
4. I will explain the procedure for the participant to withdraw from the interview and the study
5. I will review the data collection process as well as the member-checking process with each participant.
6. I will explain the necessity of recording the interview and then ask for the participant's permission to record the interview.



7. I will use an alphanumeric code (i.e., Participant 1) to identify and introduce the participant on the consent form and recording.
8. I will begin the interview and start the recording. I will start the recording with the date, time, and location.
9. I will begin the interview with question 1 and continue to complete all questions.
10. I will end the interview after the last question and stop the recording.
11. I will thank the participant for his or her time for participating in the interview.
12. I will use member checking procedures to verify the information obtained in the interview.
13. I will let the participant know when to expect the document to review the transcript.
14. I will provide my contact information and explain that if there are any questions or concerns to contact me using the information provided.
15. I will thank the participant again for his or her time and for providing information for study purposes.
16. The interview protocol will end after thanking the participant.

## Interview Questions

1. How do you review your nonprofit organization's capabilities and performance?
2. What strategies do you use to identify and implement meaningful measurements to provide evidence of program and process efficiencies and effectiveness to secure funding for your nonprofit organization?
3. How did you identify the meaningful measurements of programs and the key processes for your nonprofit organization?
4. How did you assess the effectiveness of your measures for your nonprofit organization?
5. What measures did you try that did not prove to be useful for assessing the efficiencies and effectiveness of your nonprofit organization's programs and processes?
6. How do you track and report data and information on daily operations and overall organizational performance for your nonprofit organization?
7. How do you use findings from reviews of performance measures to improve key processes for increasing and maintaining donations for meeting your nonprofit organization's performance?