2021

Strategies Nonprofit Organization Leaders Use to Increase Human and Financial Resources

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This is to certify that the doctoral study by

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

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Walden University
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Abstract

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MBA, ECPI University, 2017

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Consulting Capstone Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

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Abstract

Some nonprofit organization leaders have limited access to the resources needed to manage the organization's day-to-day needs. Nonprofit leaders without effective strategies to increase human and financial resources may lack the resources to address the mission, sustain, and effectively grow as a successful organization. Grounded in the stakeholder theory, the purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. The participants comprised three leaders from one nonprofit organization in the southern region of the United States. Data were collected from semistructured interviews, organizational documents, and publicly available archival records. The data were analyzed using thematic analysis, yielding themes of effective fundraising strategies, community involvement, board effectiveness, strategic planning, and effective recruitment strategies. A key recommendation for nonprofit organization leaders is to develop and implement a strategic plan that includes an approach for increasing stakeholder involvement and support to leverage access to resources for long-term sustainability. Implications for positive social change include the potential to provide community residents with access to mental health services and efforts to expand access to services that could improve community members' health.

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Dedication

My doctoral study is dedicated to the many people who have helped me become the woman I am today. In loving memory of my beloved mother, Carolyn B. Legree raised me to have self-confidence, self-determination, self-respect, and faith in God through whom all things are possible. To my loving and caring father, Harry Legree, Jr., who has been there for me from day one and continues to support and encourage me to be a strong woman. To my dear friend, who I lovingly refer to as my adopted Dad, Reverend Theodore Miller, thank you for having my back and for providing me with valuable guidance and knowledge during some of the most challenging times of my life.

To my loving children, my heartbeats: Jasmine, John, Michael, and Umar. I am forever blessed and honored to be your mother. I dedicate this study to each of you and pray that you will continue to seek and fulfill your dreams and goals. Let my experiences be an example of what you can do, and know that I will support you every step of the way.

Finally, to my siblings, niece, nephews, aunts, uncles, family, and friends, thank you for your love and encouragement. I do not take our relationships for granted and deeply value the bond that I have with each of you. Thank you for providing me with the wisdom and strength I needed to complete this journey.

Acknowledgments

I want to thank Dr. Peter Anthony, my chair, for his support, guidance, and encouragement while completing my doctoral study. I would also like to thank my second committee member Dr. Denise Land for her time spent reviewing my study and providing me valuable feedback to improve my doctoral study. Thank you to Dr. Janice Garfield for serving as the university research reviewer on my committee and providing me with the input needed to ensure my study was meeting the standard. Thank you to the participants of my study for allowing me the opportunity to learn about your organization and for your engagement during this journey.

I would also like to extend heartfelt thanks to Dr. Adrienne Adkins-Provost and Peterson Mirville, members of my cohort. I am forever grateful for our connection, and I cherish the times we spent working together and encouraging one another to push forward on our journey. In addition, I would like to thank Josephine Ajayi-Lediju and Laci Garner for their continued support throughout this doctoral journey. Thank you to Dr. Pettis Perry for taking the time to provide me with your insight and feedback. I would also like to thank my BFF for providing me with continued encouragement and support throughout this journey. Thank you to my church family, my sisters of 81 F.O.R., my sorority sisters, and co-workers for your support while I was on this journey. Last but not least, thank you to my husband for supporting me throughout this journey. I give all praises to God, my savior, my healer, and my deliverer.

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Section 1: Foundation of the Study

In this study, I used the 2019-2020 Baldrige Excellence Framework to explore the strategies leaders of a nonprofit organization used to increase human and financial resources. This study was completed following the guidelines for the Walden University Doctor of Business Administration Consulting Capstone program. In this study, I served as the researcher and consultant to the assigned client organization.

Background of the Problem

Nonprofit organization leaders manage financial challenges associated with operating the organization's day-to-day needs (Rathi & Given, 2017). The allocation of available financial resources is limited and often requires a strategic approach to ensure that available funding is used wisely (Kearns et al., 2014). Financial instability is a problem that many nonprofit organization leaders struggle to solve (Lam & McDougle, 2016). A lack of financial stability often leads to unsuccessful outcomes for the organizations, resulting in the organization closing (Lena, 2018). The closure of nonprofit organizations leads to a significant effect on the community, leaving a void of services provided through the nonprofit organization's efforts.

Sustainability is a critical concept for nonprofit organization leaders. Sustainability is defined in an organization as providing a valuable service to stakeholders and operating the organization in alignment with the mission to improve social outcomes (Ott et al., 2016). Fundraising is an essential component of successfully operating a nonprofit organization for the sustainability of the mission (Hommerova & Severova, 2019). Nonprofit organization leaders will benefit from focusing on building capacity and understanding the barriers influencing the availability of financial resources (Carvalho et al., 2016). Nonprofit organization leaders will improve the chances of achieving successful outcomes while acquiring and sustaining financial resources by understanding any existing or potential challenges and barriers.

Problem Statement

Changes in the economy have influenced human services organizations' sustainability and growth (Park & Mosley, 2017). During a financial crisis such as the global health pandemic of 2020, nonprofit organization leaders manage organizational needs with limited resources, as substantiated by a 57% decrease in donations to human service nonprofit organizations (Kim & Mason, 2020). The general business problem is that some nonprofit organization leaders do not have access to human and financial resources needed to sustain and effectively grow as a successful organization. The specific business problem is that some nonprofit organization leaders lack strategies for increasing human and financial resources needed to sustain and effectively grow as a successful organization to address their mission.

Purpose Statement

The purpose of this qualitative single case study was to explore the strategies nonprofit organization leaders used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. The target population consisted of three leaders of a mental health counseling nonprofit organization with knowledge of their business operations and empowered to make organizational decisions. The implications for positive social change include the potential to improve strategies for successful growth and sustainment of services, thereby increasing opportunities to provide counseling assistance to community members in need of care.

Nature of the Study

The three types of research methods are qualitative, quantitative, and mixed methods. Identifying the appropriate methodology is a significant element in the research process; the methodology chosen is the foundation of the study (Abutabenjeh & Jaradat, 2018). In qualitative research, inductive reasoning is used to explore an identified problem and develop a theory to create ideas to solve the problem (Park & Park, 2016). In quantitative research, the researcher seeks to investigate the relationship between independent and dependent variables and examine relationships to offer solutions to the identified problem (Saunders et al., 2015). Relationships or differences among variables or groups were not examined; therefore, the quantitative research method was not appropriate. Using mixed methods research incorporates quantitative and qualitative research methodologies (Saunders et al., 2015). The mixed methods approach was not appropriate for this study because no quantitative component was necessary to address the study's purpose. The qualitative methodology was used for this study. The qualitative method was appropriate for this study because I explored strategies nonprofit organization leaders used to increase human and financial resources needed to sustain and effectively grow as a successful organization.

In qualitative research, the identified problem is explored using an approach of one of the following designs: (a) ethnography, (b) phenomenology, (c) narrative, or (d) case study (Korstjens & Moser, 2017a). Ethnographic research is appropriate for researching social and cultural phenomena of ethnic groups (Saunders et al., 2015). The ethnographic design was not appropriate for this study because I did not study a specific group's culture. Phenomenology research is used when the researcher evaluates the experiences of research participants and interprets what those experiences mean (Alase, 2017). The phenomenology design was not appropriate for this study because I did not study the personal meanings of participants' experiences with a phenomenon. Narrative design researchers collect data through personal storytelling during observations or interviews with participants (Channa, 2015). The narrative design was not appropriate for this study because participants did not share information through personal narrative stories. A case study design is used to explore an in-depth understanding of a phenomenon, and there is real-life context (Yin, 2018). A multiple case study design was not appropriate because I used data collected from interviews and archival records from one nonprofit organization. The single case study design was appropriate to explore strategies nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful organization.

Research Question

The research question for this study was:

RQ: What strategies did nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission?

Interview Questions

1. How do you assess the effectiveness of strategies used to increase human resources to sustain and effectively grow as a successful organization?
2. What, if any, strategies have been successful in generating human resources needed to sustain and effectively grow as a successful organization?
3. What, if any, strategies have not been successful in generating human resources needed to sustain and effectively grow as a successful organization?
4. How do you assess the effectiveness of strategies used to increase financial resources needed to sustain and effectively grow as a successful organization?
5. What, if any, strategies have been successful in generating financial resources needed to sustain and effectively grow as a successful organization?
6. What, if any, strategies have not been successful in generating financial resources needed to sustain and effectively grow as a successful organization?
7. What role do senior-level leaders have in the implementation of strategies to increase human and financial resources to sustain and effectively grow as a successful organization?
8. What key barriers has your organization encountered that limited your ability to increase human and financial resources to sustain and effectively grow as a successful organization?
9. What, if any, strategies have you used to overcome those key barriers that limited generating human and financial resources to sustain and effectively grow as a successful organization?

10. What additional information can you provide related to generating human and financial resources to sustain and effectively grow as a successful organization?

Conceptual Framework

The conceptual framework I used for this study was the stakeholder theory. Freeman (1984) introduced the stakeholder theory in 1984. The stakeholder theory can be applied to encourage leaders to involve stakeholders in organizational decisions to promote shared visions and foster alignment of mutual goals (Ali, 2018). Stakeholders can be identified as groups of individuals or one individual who is affected by or has an interest in the organization's objectives (Manetti & Toccafondi, 2014). These stakeholders can further be defined as (a) customers, (b) employees, and (c) community resources. If leaders of an organization focus effort on (a) attracting stakeholder interest in the organization; and (b) improving the stakeholder relationship with organizations, the organization is better equipped to improve or sustain competitive advantage (Jones et al., 2018). In this study, I used the stakeholder theory to help foster an understanding of strategies nonprofit organization leaders use to achieve sustainable organizational growth.

An organization that focuses on stakeholders might benefit from long-lasting support from stakeholders and improved performance outcomes (Harrison & Wicks, 2013). Organizational leaders can leverage the stakeholder's interests to assist in the successful management of an organization (Phillips et al., 2003). I chose the stakeholder theory as the conceptual framework because it can help promote an understanding of the value of stakeholder interests and assist leaders in achieving improved organizational management and performance outcomes.

Operational Definitions

Community-based programs: Programs that provide interventions focused on improving processes that affect social behaviors and outcomes of the community (Ceptureanu et al., 2018).

Nonprofits: Organizations with a tax-exempt filing status under Internal Revenue Code section 501(c)(3). These organizations offer services that focus on providing community needs such as social services, education, and health care. Organizations with tax-exempt status are not required to pay state taxes and could receive government provided funding (Kim, 2015).

Organizational capacity: The knowledge, resources, or actions an organization may implement to help achieve identified goals and problem solve (Zhang et al., 2017).

Stakeholders: Any individual or group of individuals interested in the organization's goals and objectives. Stakeholders can include customers, taxpayers, regulatory bodies, and employees (Baldrige Performance Excellence Program, 2019; Freeman, 1984).

Sustainability: Economic development strategies that provide value to customers, stakeholders, and the community through operational decisions and actions (Ott et al., 2016).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions can be considered information that otherwise cannot be proven, or information taken for granted, therefore affecting the research outcome (Nkwake & Morrow, 2016). For this study, I assumed that all study participants would provide accurate and reliable data in response to the interview questions. Participant bias can result from varying factors such as the time commitment needed for the study and how this may influence individuals asked to participate in the research (Saunders et al., 2015). Potential bias, assumptions, and attitudes in research can compromise the credibility and validity of the data collected and the findings presented. The next assumption was that the Baldridge framework would be an appropriate tool to use when conducting a complete assessment of the assigned client organization's strengths and opportunities. Organization leaders use the Baldridge Excellence Framework to evaluate system strategies in a comprehensive manner to provide data relevant to strategic goals and process improvement (Kapp et al., 2017). Furthermore, I assumed I would have access to information about the organization and archival data that would allow me to address the research question for this study.

Limitations

Limitations are potential weaknesses in a study not in the control of the researcher (Yin, 2018). The interviews were conducted via conference call by following the requirements approved and outlined by Walden University's Institutional Review Board (IRB). The interviews were conducted with three senior leaders of the nonprofit organization, which therefore limited the views available for this research study. If I included additional participants and incorporated their experiences in this study, I would have had access to a more extensive variety of perspectives. The results of this study may not apply to other leaders of mental health nonprofit organizations. The second limitation of this study was having access only to the organizational and archival data provided to me and available to the public. Limitations to qualitative research include the skillset of the researcher and any personal bias that may exist (Anderson, 2010).

Delimitations

The researcher's choices to limit or control some aspects of the research are defined as delimitations (Marshall & Rossman, 2016). The first delimitation of this research was the participants and interviews were senior leaders of only one mental health nonprofit organization located in the southern region of the United States. Additionally, limiting the participants and data collection to that of one nonprofit organization located in a specific geographical area is also a delimitation. The research presented in this study does not include any data collected from other leaders in the nonprofit industry.

Significance of the Study

Nonprofit organization leaders must manage challenges related to limited resources. Limited resources may limit a nonprofit organization from achieving sustainable growth (Pennerstorfer & Rutherford, 2019). The results from this study can add value to nonprofit organizations by encouraging leaders to engage stakeholders and bridge any existing gaps that may be limiting the growth of the nonprofit organization.

The strategies for achieving sustainable growth of nonprofit organizations may be relevant to other senior-level leaders in the industry, offering strategies to facilitate growth efforts.

The findings from this study may add contributions and value to existing strategies for nonprofit organizations. Some of the benefits to result from the sustainable growth of a nonprofit organization include (a) customer-centered outcomes, (b) improved customer experiences, (c) improved employee satisfaction, and (d) improved stakeholder engagement. Sharing strategies senior-level nonprofit organization leaders may use to achieve sustainable growth may benefit the industry. Some of these benefits are (a) increasing access to funds and resources, (b) improving stakeholder buy-in and support for the organization, and (c) improved capacity for the organization to provide services to the community.

Implications for Social Change

The results from this study may lead to positive social change by equipping senior-level nonprofit organization leaders with strategies to create sustainable value and growth. Senior-level managers could be empowered and enabled to create value for stakeholders effectively leading to improved stakeholder engagement. An enhanced level of engagement from stakeholders can improve outcomes that directly catalyze social change in the community. Improving the approach to increasing resources and stakeholder engagement may positively affect the services available to clients of the organizations and the communities' outcomes.

A Review of the Professional and Academic Literature

The purpose of this qualitative single case study was to explore the strategies nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful business. Nonprofit organizations provide valuable services to the local and surrounding communities. Nonprofit organization leaders who struggle to identify new or additional revenue resources experience challenges in sustaining financial stability (Rottkamp & Bahazhevska, 2016). Without adequate resources, nonprofit organization leaders might be unable to meet the demand for services.

The literature review includes a comprehensive overview of the conceptual framework and increasing human and financial resources to sustain and effectively grow nonprofit organizations. The literature review sets the foundation for the researcher to examine published research and identify any gaps or inconsistencies in the study's topic (Badenhorst, 2018). Conducting a literature review involves an analysis of existing research and then deciding what previous research is relevant to include in the study (Saunders et al., 2015). This review of professional and academic literature was organized to include stakeholder theory as the conceptual framework. The stakeholder theory served as the foundation for providing leaders of a nonprofit organization with strategies for improving access to human and financial resources.

Method for Gathering Information

In this literature review, I used Walden University Library's database, Google Scholar, and scholarly books to research data for this review of professional and academic literature. The databases used for this study included ProQuest, Business Source Complete, ProQuest, Sage Journals, Science Direct, and EBSCO. The following search terms were used: *nonprofit organizations, resources, financial resources, human resources, stakeholder theory, organizational capacity, strategic planning, leadership, transformational leadership, nonprofit boards, nonprofit fundraising, growth strategies, revenue diversification,* and *innovation.* Walden University Doctor of Business Administration students are encouraged to reference resources with dates that are in 5 years of their anticipated completion of the study. In this literature review, 146 sources were cited with a breakdown as follows: 134 were peer-reviewed scholarly sources, and 12 were nonpeer reviewed sources or government sources. Of the references included in this literature review, I conducted an exhaustive search with 71% of sources that were published in the last 5 years of the chief academic officer anticipated approval date for this study.

Stakeholder Theory

Stakeholder theory is the conceptual framework I used to support increasing human and financial resources needed to sustain and effectively grow as a successful business. According to Freeman (1994), leaders apply the stakeholder theory as a guide to operating their organization with the stakeholder's interest as a priority. The stakeholder theory is defined as a group of theories leaders and managers use when trying to understand the relationship an organization has with the organization's identified stakeholders (Jones et al., 2018). According to Miles (2017), the stakeholder theory is defined as a theory with multiple business sense applications with opportunities for interpretation of who is identified as the stakeholder. Stakeholders have been classified into three categories: (1) power to influence the organization, (2) legitimate relationship with the organization, and (3) how important the stakeholder claim governs the organization (Mitchell et al., 1997). The interests of stakeholders should be considered when making strategic plans for the organization. Strategy development can help nonprofit organization leaders meet goals and outcomes.

Focus on stakeholder interest can influence decision making and goal development for nonprofit organization leaders. Stakeholder theory has been referenced as a theory that organization leaders can use to help strategize for optimal outcomes while keeping all stakeholders' interests balanced (Soin, 2018). According to Phillips (1997), some researchers do not easily understand the stakeholder theory. Some of the reasons for this lack of understanding include (a) a lack of justification for the framework, (b) lack of ability to quickly make decisions about stakeholder concerns, and (c) lack of ability to promptly identify stakeholders (Phillips, 1997). Improving competitive advantage and sustainability can be achieved by applying strategies based on identifying challenges and addressing existing and potential barriers. Challenges nonprofit organization leaders manage include access to adequate human and financial resources that are needed.

Increasing human and financial resources can create or expand opportunities for leaders of organizations to meet identified goals and achieve the mission set for the organization. The stakeholder theory application creates opportunities for leaders of organizations to use a practical approach to managing business operations (Harrison et al., 2015). With the stakeholder theory application, nonprofit organization leaders can implement strategies to help increase human and financial resources. Using the stakeholder theory and the Baldrige Excellence Framework (Baldrige Performance Excellence Program, 2019), I identified the nonprofit mental health organization's stakeholders and addressed the research question in this study.

Stakeholder management is an essential element of the process of engaging stakeholders. Diverse, engaged stakeholders are beneficial for organization leaders to facilitate stakeholder management and cultivate effective solutions and outcomes for projects (Lehtinen & Aaltonen, 2020). According to Ali (2018), the benefits of exploring stakeholder management are identified as (a) understanding the response to environmental change, (b) understanding the differences among stakeholder and nonstakeholder organizations, and (c) defining what characterizes stakeholder organizations and the mechanics of stakeholder management. Stakeholder management is an approach that puts processes in place for leaders to establish positive and valuable relationships with stakeholders of an organization (Pedrini & Ferri, 2019). In a single qualitative case study, Ali researched proactive stakeholder management, focusing on highlighting the difference between stakeholder and nonstakeholder firms. Ali presents findings that support the need to engage in bold support of stakeholders. The Rating, Reactive, Defensive, Accommodative, and Proactive scale can help leaders of an organization understand if operational activities are designed to be proactive versus defensive or reactive (Ali, 2018). Strategies for effective stakeholder management should include continuous surveillance of the environment to prepare for implementing changes as needed.

The application of stakeholder management strategies can serve as a framework for nonprofit organization leaders. Application of the stakeholder theory and strategic management assists leaders in making improved business decisions (Freeman et al., 2020). Nonprofit organization leaders are more likely to achieve successful outcomes by applying stakeholder management strategies to improve stakeholder engagement and innovation (Loureiro et al., 2020). These strategies were helpful to address the research question for this study and provide tools or resources leaders can use to increase stakeholder engagement. Understanding the concept of increased stakeholder engagement can lead to opportunities for nonprofit organization leaders to learn more about increasing human and financial resources.

The stakeholder theory can be applied to find innovative ways to increase stakeholder engagement. The stakeholder theory has been defined as a framework that organizational leaders use to explain decision-making to bridge gaps between the organization and the stakeholders (Parris et al., 2016). Increased stakeholder engagement could result from including stakeholders in multiple aspects of the planning process, including gathering information and strategic approaches to communicate with stakeholders (Rodriguez-Calero et al., 2020). Innovative ways to engage stakeholders using the stakeholder theory as the framework was explored in a qualitative case study with findings suggesting leaders can increase value for stakeholders with service innovation (Parris et al., 2016). This research study was conducted using the experiences of the athletic department at Arizona State University. Identifying innovative ways to keep existing stakeholders engaged and interested and gain new stakeholders' interest is critical to the success of any organization.

In the nonprofit industry, keeping existing stakeholders engaged while gaining new stakeholders is considerably more critical to the organization's success and sustainability. Nonprofit organization leaders can improve stakeholder engagement outcomes with improved ways to communicate and further define the intended target audience (Ihm, 2019). Increased stakeholder engagement results in high stakeholder commitment and support to the organization (Hoefer & Twis, 2018). Nonprofit organization leaders have traditionally struggled with financial challenges resulting in limited ability to fulfill the mission of the organization (Berrett & Holliday, 2018). Implementing new theoretical approaches can help nonprofit organization leaders manage change to gain successful outcomes (Parris et al., 2016). Stakeholder engagement is an essential factor for nonprofit organization leaders focused on finding sustainable methods to facilitate growth and outcomes. Nonprofit organization leaders can benefit from identifying innovative ideas to improve stakeholder engagement and commitment, resulting in enhanced organizational growth and sustainability.

Understanding the driving factors for increasing stakeholder engagement can be beneficial for leaders in the strategic planning process. Lochrie (2016) conducted a multiple case study to explore strategies managers might use to gain stakeholder interest and engagement. Three United Kingdom World Heritage Sites were included in this study. The stakeholder theory application is relevant in this case study because the World Heritage Site functions based on stakeholders wanting to be socially responsible and collaborate with others to meet the organization's overall intended goals (Lochrie, 2016). The findings of this case study indicated individuals serving in a manager role were successful in gaining stakeholder support with the implementation of strategies that raised public awareness and required managers to participate in activities that resulted in an ongoing representation of the organization (Lochrie, 2016). However, management representation is often limited due to competing responsibilities and access to limited resources (Lochrie, 2016). Nonprofit organization leaders are often challenged by competing duties and tasks, which may cause additional challenges if there are limitations on available staff members and resources to meet and sustain the organization's operational needs. Additionally, because of the competing responsibilities, nonprofit organization leaders are often unable to dedicate the required time and resources needed to foster the organization's growth.

To be prepared to foster the growth of an organization, nonprofit organization leaders will benefit from understanding the type of stakeholders that exist and the best practice for successful communication with stakeholders. According to Thibodeau and Ruling (2015), four types of communities relate to the stakeholder theory. These communities include (a) community of place, (b) community of interest, (c) virtual advocacy groups, and (d) communities of practice (Thibodeau & Ruling, 2015). Nonprofit organization leaders face challenges with the changing needs of the community and the varying levels of expectations related to engagement with stakeholders (Weaver et al., 2019). Suppose stakeholders have a cognitive, material, or emotional connection and commitment to the nonprofit organization. In that case, there are increased chances for a leader to create a sense of urgency to achieve specific goals in the nonprofit organization (Thibodeau & Ruling, 2015). Understanding how these stakeholder communities are different and how to connect to the needs of the individuals in the communities can improve the communication to stakeholders and outcomes. Nonprofit organization leaders who make efforts to improve or create relationships with stakeholders have increased chances of achieving organizational goals related to stakeholder engagement.

Management of the stakeholder relationship is crucial to achieving successful outcomes and project goals. Relationship management is a critical success factor for nonprofit organization leaders (Maier, 2015). Leaders can leverage existing relationships with stakeholders to enhance the plan set forth for the nonprofit organization. Not taking advantage of this opportunity might lead to decreased stakeholder interest and involvement. However, as an organization's needs evolve, leaders must recognize the necessity of individual stakeholder relationships. According to Jawahar and McLaughlin (2001), leaders of organizations should engage with stakeholders based on the cycle of the organization and the essential needs in question because the needs of the organization vary during the life cycle.

Additionally, decreased engagement from nonprofit organization leaders might lead to missed opportunities for building successful and long-lasting relationships. According to Raisiene et al. (2018), governance in organizations should be a collaborative effort that allows an opportunity for stakeholders to be involved and serve a purpose. Leaders are encouraged to consider the role stakeholders have in the decision making that takes place in the organization to foster good relationships with stakeholders. Applying the stakeholder theory to planning efforts can benefit nonprofit organization leaders and guide discussions related to strategic planning and improved stakeholder engagement.

Strategy development can be an effective tool for nonprofit organization leaders and can result in improved outcomes and organizational growth. Researchers have used the stakeholder theory as a foundation for building strategies leaders of organizations could use to help create value and meaning by remaining an active role for stakeholders (Gooyert et al., 2017). Five key characteristics were identified as helpful in reporting stakeholder engagement, (a) direct communication, (b) clarity of stakeholder identity, (c) intentional collection of feedback, (d) inclusiveness, and (e) learning from experiences of stakeholder engagement (Herremans et al., 2016). Nonprofit organization leaders can promote stakeholder engagement using a reporting structure. This structure has been used in previous research to share performance outcomes and influence the decisions of stakeholders. Leaders can use the characteristics identified above to improve communication efforts and identify best practices for engaging stakeholders and developing new and existing stakeholder relationships.

Nonprofit organization leaders are focused on stakeholder interests, stakeholder engagement, and the value the stakeholder can bring to an organization. In a study conducted by Gooyert et al. (2017), instrumental stakeholder theory is defined as actions that are in the best interest of the organization when stakeholder interests are satisfied. Organization leaders have an increased focus on ensuring value and sustainability in the organization's operational activities (Gooyert et al., 2017). The suggested benefits of instrumental stakeholder theory include improved organizational outcomes and increased trust from stakeholders (Bridoux & Vishwanathan, 2020). For this study, understanding how the stakeholder theory can be used in collaboration with other strategies was beneficial in answering the research question. Nonprofit organization leaders might be equipped with the tools and resources to improve outcomes and increase trust with stakeholders applying the stakeholder theory to strategy development.

Based on the strategy development efforts, leaders have the opportunity to determine the best stakeholder theory and potential benefits for the organization at that time. According to Weitzner and Deutsch (2019), the instrumental stakeholder theory's application might not be useful for most organizations. Instrumental stakeholder theory suggests that organizations' leaders can connect resources and strategies that will result in the best-case scenario (Weitzner & Deutsch, 2019). This concept results from the research findings on applying instrumental stakeholder theory to sustain competitive advantage (Jones et al., 2018). Using a resource-based view and instrumental stakeholder theory might foster ethical interactions between organizations' leaders and stakeholders (Jones et al., 2018). Continuing to promote instrumental stakeholder theory could lead to ethical concerns, and therefore researchers have suggested refraining from applying this theory to gain competitive advantage (Weitzner & Deutsch, 2019). Organization leaders can use the instrumental stakeholder theory to develop strategies for improved sustainment and growth. Although researchers might not find the instrumental stakeholder theory as the best ethical choice, leaders still benefit from learning more about competitive advantage.

Leaders can apply the stakeholder theory in efforts to address the evolving needs associated with operating an organization. In addition to the instrumental stakeholder theory, researchers have also classified versions of stakeholder theory to include (a) descriptive/empirical stakeholder theory, (b) normative stakeholder theory, and (c) integrative stakeholder theory (Horisch et al., 2014). Descriptive stakeholder theory focuses on organizational management and key stakeholders, while normative stakeholder theory focuses on why the organization is operating (Horisch et al., 2014). Elements of descriptive stakeholder theory include understanding why some stakeholders' needs are more important than others from organizational leaders' perspectives (Flak et al., 2008). According to Egels-Zanden and Sandberg (2010), descriptive stakeholder theory can be applied to understanding and explaining the characteristics of how an organization operates. Researchers have noted the normative stakeholder theory can be further classified as (a) moderate, (b) intermediate, and (c) demanding stakeholder involvement (Flak et al., 2008). Integrative stakeholder theory is a combination of descriptive, instrumental, and normative stakeholder theory (Horisch et al., 2014). Leaders who understand how to operate an organization successfully are more likely to meet set goals and benefit from sustained growth. One approach to understanding how an organization operates includes learning about the interests of the stakeholder. Understanding the stakeholder interests is valuable for leaders being able to keep existing stakeholders and gain new stakeholders.

Researchers have noted that initially gaining stakeholder interest is essential, but sustaining the stakeholder's interest is equally crucial. The application of the stakeholder theory can assist leaders in fostering sustained relationships with stakeholders. Stakeholders are essential to an organization's success because they help set the expectations for acceptable and unacceptable behavior (Shafiq et al., 2014). Stakeholders are also relevant because they can influence the leader's strategic alignment of social practices and stakeholder expectations (Shafiq et al., 2014). Leaders of an organization are likely to benefit from implementing strategies directed towards creating a long-lasting relationship with stakeholders. This relationship should involve opportunities for leaders to understand what stakeholder interests are and how the stakeholder can act to support the organizational mission and goal for an extended period. When considering stakeholder engagement, Gooyert et al. (2017) noted it is vital for leaders of an organization to recognize the difference in stakeholder interests instead of taking for granted that all stakeholders value the same issues or concerns. Stakeholder engagement will also be determined by whether the stakeholder considers the commitment or relationship with the organization to be significant (de la Cruz Deniz-Deniz et al., 2016). Stakeholder engagement requires efforts by both the leader of the organization and the stakeholder. Through a shared interest in mutual goals, leaders can foster a productive and sustainable relationship with stakeholders.

Researchers have conducted studies to measure the effectiveness of stakeholder engagement. Results from a study on active stakeholder engagement in the design and implementation of clinical trials suggested some best practices for sustaining stakeholder engagement (Barger et al., 2019). These best practices include (a) engaging stakeholders in the beginning and throughout the relationship, (b) taking a personal approach to meet the stakeholder needs, (c) explain the rationale for decisions made, and (d) ensuring there are mutual trust and respect through ongoing communication (Barger et al., 2019). Successful stakeholder engagement is contingent on the availability of funding and ongoing support from stakeholders in the community and stakeholders directly working for the organization (Thizy et al., 2019). A lack of stakeholder engagement may result in missed opportunities to create value for stakeholders.

Stakeholder engagement is vital to leaders of organizations, but equally important is the need to create value for stakeholders. Researchers have applied the stakeholder theory to explain the influence stakeholders can have on organizational decision-making (Severgnini et al., 2018). Stakeholders were identified as either primary or secondary by researchers to evaluate and measure how the organization is performing (Severgnini et al., 2018). Primary stakeholders are identified as (a) customers, (b) investors, or (c) employees (Severgnini et al., 2018). In contrast, secondary stakeholders are identified as individuals who can influence leaders of the organization but do so without any contact (Severgnini et al., 2018). Secondary stakeholders could be identified as (a) the media, (b) government, or (c) the community in general (Severgnini et al., 2018). Findings from the research suggest that there are tools that can be applied to understand stakeholders better so that organizational leaders might be able to achieve desired outcomes relative to the organization's operations (Severgnini et al., 2018). According to Horisch et al. (2014), the stakeholder theory can be applied in managing organizations to help implement and sustain strategic solutions.

Implementing and sustaining new strategies are critical to the success of organizations. Nonprofit organization leaders benefit from understanding how stakeholders are identified and ways to engage stakeholders in value-added activities. The research question for this study was related to strategies nonprofit organization leaders can use to increase human and financial resources. Leaders who can identify the role stakeholders have in the organization are better equipped to implement strategic solutions for improved engagement. Additionally, understanding the different stakeholder theory types is beneficial to nonprofit organization leaders when working to identify the best approach for achieving successful outcomes.

Comparison to Other Theories

Other theories I considered using as the conceptual framework for this study were the general systems theory, the resource dependence theory, and the resource-based theory. After researching these theories, I decided that none of the other theories would be appropriate based on the business problem and research question for this study. The first theory I considered for the conceptual framework for this study was the general systems theory. The general systems theory has been identified as a tool to help leaders of organizations understand how to improve processes and operational strategies (Kast & Rosenzweig, 1972). Von Bertalanffy introduced the general systems theory in the late 1920s with an original focus on the biology field (von Bertalanffy, 1950). The general systems theory can be applied to help leaders of an organization understand how different systems inside the organization operate in comparison to the entire organization or other organizations in the industry.

In this study, the nonprofit mental health organization did not have the necessary number of systems to justify using general systems theory as the conceptual framework for this study. Because the organization was small, applying the general systems theory to address strategic development did not align with the purpose of this study. The purpose of this research study did not have a focus on process improvement; therefore, applying the general systems theory was not appropriate as the conceptual framework. General systems theory was not chosen as the conceptual framework because it did not align with the research question for this study.

The second theory I considered as the conceptual framework for this study was the resource dependence theory. The resource dependence theory can be applied when leaders want to understand how an organization operates relative to the resources made available (Ma et al., 2019). Researchers suggest that resource dependence theory benefits leaders in strategic planning as they work to manage how much they rely on external resources and relationships (Sherer et al., 2019). According to Sherer et al. (2019), organizational leaders must manage how much they depend on other organizations and the effect this dependence has on the availability of resources. Allocating available resources can sometimes be challenging for nonprofit organization leaders when efforts are made to meet organizational needs.

Understanding how best to use the resources available to an organization efficiently and effectively is beneficial to leaders of an organization. In previous research, it has been suggested that leaders of organizations can apply resource dependence theory to highlight the lack of resources available and how it creates uncertainty moving forward (Coupet, 2017). For example, Coupet (2017) researched historically black colleges and universities using financial data collected over 5 years to explore how sources of revenue affect the university's efficiency. The resource dependence theory was the conceptual framework used to highlight how a university depends on financial resources and how this dependency drives operational activities. The resource dependence theory can be applied to research when there is a need to explore the efficient use of resources when there are limits on resource availability.

The purpose of this study was to address strategies nonprofit organization leaders use to increase human and financial resources. The resource dependence theory is applied for researchers to explore how leaders operate an organization using the resources available. The stakeholder theory was better aligned to explore the strategies used to increase resources for this research study. Resource dependence theory was not chosen as the conceptual framework because it did not align with the research question for this study.

The final theory I considered as the conceptual framework for this study was the resource-based theory. When the resource-based theory is applied to organizational management, there is a focus on the relationship between having a competitive advantage and how resources are used (Shan et al., 2019). Resource-based theory can be applied to help leaders understand how resources can be used to sustain organizational development efforts (Shan et al., 2019). According to Zhang et al. (2020), the resource-based theory application can allow organizational leaders to gain a competitive advantage resulting in improved financial outcomes.

Nonprofit organization leaders strive to improve outcomes of value for stakeholders. In previous research, the resource-based theory was used as the framework to examine strategies for success when organizations are undergoing financial crises (Lopez-Arceiz et al., 2017). Researchers identified that having available resources does not guarantee stakeholders will find value in the resources when there is a financial crisis (Lopez-Arceiz et al., 2017). The resource-based theory has been applied in operational management strategies to improve processes that focus on competitive advantages (Hitt et al., 2016). As leaders consider their strategic approach to best use the resources and use them to improve advantages among competitors, the resource-based theory can be applied to guide decision making. The resource-based theory is a theory that can be applied in research to identify strategies for improved sustainability.

The purpose of this study was to address strategies nonprofit organization leaders use to increase human and financial resources. The resource-based theory is applied for researchers to explore how leaders can gain sustainable competitive advantage using a strategic approach to resource utilization. The stakeholder theory was better aligned to explore the strategies used to increase resources for this study. The resource-based theory was not chosen as the conceptual framework because it did not align with the research question for this study.

Strategic Planning

Nonprofit organization leaders are challenged with managing a successful organization amid continuous change. Nonprofit organization leaders need to be prepared to respond to the complex changes in the environment and do so by planning (Brosan & Levin, 2017; Langer & LeRoux, 2017). Also, the response to these complex changes should be well developed and innovative so that the nonprofit organization leader can meet the goals put in place (Langer & LeRoux, 2017). With limited budgets, leaders of smaller organizations should be mindful of the potential challenges and risks, therefore, choosing to seek advice for strategic planning from successful nonprofit organizations of a similar size (McMahon et al., 2015). Leaders must engage in strategic planning efforts to help mitigate the many factors that shape successful outcomes of operating a nonprofit organization.

Strategic planning should take place continuously to ensure any relevant (a) strengths, (b) weaknesses, (c) opportunities, (d) threats (SWOT) are addressed promptly. Strang (2018) conducted a study to investigate the strategic planning and critical success factors nonprofit organization leaders might find useful. The critical success factors identified include (a) leadership, (b) strategic planning, (c) innovation, (d) documented procedures, (e) resources, (f) financial management, and (h) collaborative fundraising efforts (Strang, 2018). Leaders can use strategic planning to identify the activities required to increase resources needed to meet an organization's needs (Gratton, 2018). Strang used the planning methodology focused on addressing the strengths, weaknesses, opportunities, and threats of an organization while also looking at these elements in reverse order of threats, opportunities, weaknesses, and strengths (TOWS). Strang implemented the SWOT-TOWS approach in research and was able to demonstrate the priority and relationship among the critical success factors. In this SWOT-TOWS approach, Strang evaluated any external threats or opportunities compared to an organization's weaknesses and strengths. To conclude research on this topic, Strang then placed the critical success factors into three categories (a) market performance, (b) ethical responsibility, and (c) human resources. Identifying categories to place focus and strategic planning efforts can help nonprofit organization leaders looking for ways to achieve successful outcomes. There are creative ways nonprofit organization leaders can implement strategic planning in their organization.

To increase opportunities for successful strategy implementation, nonprofit organization leaders can create road maps to help visualize plans to execute. Developing strategic plans are critical for adequate planning and management of an organization (Rana et al., 2017). A strategic road map has been suggested in previous research to be used by nonprofit organization leaders to help prepare for a future change (Brosan & Levin, 2017; Tenney & Sheikh, 2020). The strategic roadmap would consist of strategic and relational information and updated routinely to include current information (Brosan & Levin, 2017). Nonprofit organization leaders are often challenged by access to limited resources; therefore, the priority focus is often on taking action that will directly meet the organization's mission (Tenney & Sheikh, 2020). According to Brosan and Levin (2017), a strategic roadmap can be completed when nonprofit organization leaders follow a six-step process. The six steps are listed as follows: (a) creating a planning team, (b) internal data collection, (c) external data collection, (d) choosing focus areas, (e) outlining next steps and actions items, and (f) implementation and monitoring of the strategic plan (Brosan & Levin, 2017). Nonprofit organization leaders could benefit from adopting the use of a strategic roadmap for planning, resulting in (a) improved collaboration, (b) increased engagement, and (c) commitment to the mission and vision of the organization (Brosan & Levin, 2017). Nonprofit organization leaders benefit from implementing strategies that foster successful business outcomes; understanding how strategic planning can improve business outcomes is vital for leaders. There are various tools nonprofit organization leaders can choose from when creating and implementing organizational strategies.

Strategic Planning Tools

Nonprofit organization leaders can use strategic planning tools to help identify areas of strengths and weaknesses. Leaders use strategic planning tools as a guide for developing a framework for achieving successful outcomes. In the following section, tools available for strategy development are reviewed.

Circle Mapping

Nonprofit organization leaders can implement a strategy identified as circle mapping to promote growth and success. Circle mapping is defined as a visual tool that leaders can use to assist in mapping out and explaining options for growth opportunities (Bruni-Bossio et al., 2018). Nonprofit organization leaders might increase opportunities for growth and long-term survival of the organization, focusing on identifying and participating in activities that foster strategic decision making (Cloutier & Ravasi, 2020). The circle mapping tool can be used in collaboration with strategy analysis frameworks to assist in presenting strategies identified visually to stakeholders (Bruni-Bossio et al., 2018). Using a strategic approach can help leaders connect the overall goals with the actual strategic actions. Implementing the use of the circle mapping tool can help leaders promote discussion about exploring several paths to growth rather than focusing on only one idea at a time (Bruni-Bossio et al., 2018). The circle map is made up of several elements that include: (a) current customers of the organization, (b) next customers of the organization, and (c) future customers of the organization (Bruni-Bossio et al., 2018). Circle mapping prompts leaders to consider the concept of growth as an opportunity to align potential value propositions with the available resources of the organization on the journey to long-term success (Bruni-Bossio et al., 2018). Implementing circle mapping can allow nonprofit organization leaders to visualize information related to strategic plans for long-term goal setting. Preparing information that is understandable for stakeholders can increase stakeholder engagement and commitment.

Cross-Sector Social Partnerships

Improved stakeholder engagement and commitment can be accomplished through seeking opportunities for collaboration. Cross-sector social partnership case-based theory can be applied to support a case for promoting value-added collaboration among businesses, nonprofit organizations, and government agencies to provide long-lasting benefits to meeting successful outcomes for the organizations involved (Shumate et al., 2018). Nonprofit organization leaders can foster stakeholder engagement by agreeing to partnerships that are likely to lead to improved chances to support the mission of the organization (MacDonald et al., 2019). This collaboration might allow for improved use of resources leading to more significant benefits for the stakeholders and nonprofit organizations' customers (Shumate et al., 2018). nonprofit organization leaders might be motivated to collaborate with other organizations or agencies because of (a) the need for additional resources, (b) the need for improved management competence, and (c) the desire to seek out new knowledge (Shumate et al., 2018). According to Brown et al. (2019), leaders can likely resolve difficult problems with collaboration at multiple levels. Researchers conducted a quantitative study collecting data from 452 senior-level nonprofit organization leaders, noting there was little evidence suggesting that nonprofit organizations acquire more significant gains from cross-sector social partnerships (Shumate et al., 2018). Therefore, cross-sector social partnerships might not always increase the capacity of nonprofit organizations as desired. Nonprofit organization leaders should consider additional strategic planning tools to increase growth and stability.

Nonprofit Capacities Instrument

Increased growth and stability cannot be achieved without the capacity to do so. Nonprofit organization leaders must manage the challenge of determining if there is adequate capacity to move forward with decisions. Nonprofit capacity includes the processes, practices, and individuals that an organization identifies as resources that can be used to effectively serve the purpose of the organization (Despard, 2017; Shumate et al., 2017). These resources can allow the organizational leaders to accomplish set goals and push forward the mission of the organization. Researchers identify the nonprofit capacities instrument as a tool that allows for eight nonprofit capacities to be measured (Shumate et al., 2017). The eight capacities include: (a) financial management, (b) adaptive capacity, (c) strategic planning, (d) external communication, (e) board leadership, (f) operational capacity, (g) mission orientation, and (h) staff management (Shumate et al., 2017). Nonprofit organization leaders can use the nonprofit capacities instrument to self-report information that can be used to measure capacity, using the assessment results to make organizational improvements or compare findings to other organizations when needed (Shumate et al., 2017). Researchers indicated that the nonprofit capacities instrument might be helpful if the leaders of an organization would like to strategically plan for targeting specific capacities for improvement and compare other nonprofit organizations (Shumate et al., 2017). Understanding the strategic planning tools available to nonprofit organization leaders is beneficial for planning purposes and collaboration toward successful outcomes. Implementing a strategic plan using the tools available will benefit nonprofit organization leaders as efforts are made to increase human and financial resources.

Leadership in Nonprofit Organizations

The skillset of individuals in leadership roles can significantly affect the sustainability and growth of nonprofit organizations. Leadership roles should be defined to help with the organization's structure and drive successful outcomes (Nebojša, 2017; Törnblom, 2018). The nature of operating a nonprofit organization raises awareness of the evolving needs of the organization with regards the (a) needs, (b) organizational values, (c) technology advancements, and (d) employee motivating factors (Törnblom, 2018). Understanding the business drivers necessary to accomplish desired outcomes will help individuals serving in a leadership role. Various external and internal factors often challenge nonprofit organization leaders.

Previous research has evaluated the relationship between leadership styles and the decision-making models used by leaders in the nonprofit industry. Five decision-making models introduced include (a) rational, (b) intuitive, (c) dependent, (d) avoidant, and (e) spontaneous (Uzonwanne, 2015). According to Uzonwanne (2015), effective leadership styles are significant in society and a necessary characteristic for leaders to manage a business and successfully achieve operational goals. Leaders might benefit from first identifying achievable goals and then making sure the goals are measurable. Effective leadership skills can foster the development of goals and monitor goals, which can result in positive outcomes for the organization. Nonprofit organization leaders can make decisions when one of the five decision-making models is incorporated into the leadership style.

In addition, nonprofit organization leaders need to understand how their organization is modeled and the critical aspects of the organizational components. According to Nebojša (2017), four organizational models have been identified as (a) autocratic, (b) bureaucratic, (c) innovative, and (d) task models. Key organizational components are identified as (a) organizational structure, (b) control, (c) culture, (d) leadership, and (e) change management strategy (Nebojša, 2017). Nonprofit organization leaders might use organizational models to help implement strategies that can support the identified needs and opportunities to foster successful outcomes. Nonprofit organization leaders can drive employee participation in completing tasks directly related to the organization's mission to help benefit successful outcomes (Liao, 2017). As the dynamics of the employees change, the leader may have to adjust their leadership style to meet the organization's needs. Organizational leaders should strive to empower and support others in the organization while working to achieve organizational outcomes.

Nonprofit organization leaders can empower and support others by providing value through actions taken and fostering positive relationship building. Value-added aspects of being a great leader include the following: (a) will lead to lead, (b) expressed dominance, and (c) commitment to the social good of the organization (Northouse, 2016). According to Ivanov et al. (2021), leaders should have (a) experience in planning, (b) promote innovative ideas, (c) willingness to be flexible, (d) accountability, and (e) an awareness for how he or she treats subordinates. Great leaders lead through examples gained from individual experiences and the ability to apply what is learned from those experiences to lead and assist others. Influential leaders can foster continued growth and consistency when motivating factors are components of everyday tasks. For this study, an understanding of how leadership affected leaders' ability to foster good relationships with stakeholders can lead to strategy implementation for increasing human and financial resources.

Leadership Styles

Previous research has identified several leadership styles that might be beneficial to leaders. The relationship between servant leadership and organizational performance and its effect on the organizational strategy and structure has been explored in previous research. It has been suggested that the servant leadership style allows leaders to invest in employee development and growth, leveraging the skills available that allow for sharing of knowledge in the organization (Eva et al., 2018). The servant leadership style requires that leaders focus on their followers' needs and create a culture of trust and respect (Northouse, 2016). Critical components of this style of leadership include leaders exhibiting behaviors such as (a) emotional healing, (b) fostering an environment where followers are encouraged to pursue personal growth and success, and (c) empowerment (Northouse, 2016). Leaders are encouraged to create an environment where trust and opportunities for continued support toward growth and development are essential for stakeholders. Servant leaders need to place stakeholders' needs first while working to meet the organization's needs.

Accomplishing organizational goals cannot be done alone in most cases. Servant leaders recognize this as an opportunity to seek partners to achieve organizational goals. Servant leaders’ can be useful when they partner with their followers to help develop them as future influential and caring leaders (Newman et al., 2017). Servant leaders act as stewards and focus on the organization's sustainability (Eva et al., 2018). Also, servant leaders practice excellent listening skills and make genuine efforts toward being present and aware of what followers may need (Northouse, 2016). Recruitment for servant leaders might help drive successful outcomes in (a) organizational performance, (b) strategic development, and (c) structure (Eva et al., 2018). Leaders who follow a servant leadership style are positioned to drive efforts related to successful organizational outcomes. In addition to the servant leadership style, some leaders focus on meeting the organizational goals and organizational growth.

Identifying the leadership style that is best suited for each leader helps develop strategies and approaches to managing the organization's needs. Transactional leadership is suggested as a leadership style that is significant in fostering effective leadership (Curtis, 2018). Transactional leadership is described as any transaction or exchange between the leader and those who are following the leader (Aboramadan & Dahleez, 2020; Curtis, 2018). According to Curtis (2018), leaders who influence followers can increase the likelihood that followers will commit to completing tasks with minimized resistance. Some of the tactics commonly used for influencing others include: (a) apprising (b) pressure, (c) rational persuasion consultation, and (d) legitimating tactics (Curtis, 2018). Transactional leaders can be less effective (Jelaca et al., 2020) do not always promote change and influence followers to accept things as they are. With this style of leadership, there are limiting opportunities for improvements in the organization and individually. Influencing of followers has also taken place in relationship building, where leaders follow the transformational leadership style.

In previous research, the transformational leadership style and leaders' influencing behaviors were evaluated to determine if there is a connection between the two factors. Transformational leaders have a distinctive personality and can recognize the need to motivate employees while gaining their trust and respect (Benson, 2015; Faupel & SuB, 2018). Transformational leadership is defined as a leadership style where leaders recognize when change is needed and ensure those involved in the change are inspired to do so (Curtis, 2018). Transformational leaders focus on making connections and fostering relationships with employees and other critical stakeholders in the organization and community (Northouse, 2016). Leaders who identify as transformational leaders provide direction based on the needs of the organization through effective tactics. Transformational leaders can improve the organizational environment and outcomes by understanding stakeholders and how growth can occur for individual stakeholders and the organization.

Leaders should possess characteristics that allow for acknowledging the need for continuous improvements, addressing the need for change, and pushing employees to go beyond their limits. Leaders who expect change processes to be accepted must keep in mind that as a leader, their actions, beliefs, and behaviors can influence the outcome of goals (Moldovan & Macarie, 2014). The transformational leader is engaged in the entire process and uses his or her personality to effect change positively (Curtis, 2018). In addition, transformational leaders inspire growth in followers by encouraging innovative thinking and productive work ethics (Frieder et al., 2018). Transformational leaders can change the narrative in an organization and help foster growth. However, the development of leadership skills is critical to the success of nonprofit leaders.

Strong leadership skills can be essential in any industry to help foster continued success and effective management of the operational aspects of the organization. In the nonprofit industry, leaders are faced with the challenges of increasing human and financial resources needed to sustain and effectively grow as a successful organization on a routine basis. Actions taken by transformational leaders can shape the level of employee commitment to an organization (Brimhall, 2019; Peng et al., 2020). Having good knowledge of the various leadership styles and models is essential to help understand the influence leaders can have on an organization's successes and failures. Nonprofit organization leaders strive to be equipped with the skillset that will allow them to navigate the local, state, and government resources to acquire what is needed to achieve successful outcomes for their organization.

Nonprofit Organizations

Nonprofit organizations are identified as organizations that operate to provide nonprofit services. Not all nonprofit organizations are identified as having a 501(c)(3) status as described by the Internal Revenue Code definition. Under the Internal Revenue Code section 501(c)(3), nonprofit organizations with a tax-exempt filing status are obligated to adhere to rules such as filing annual income tax returns, benefit from being exempt from federal income tax and any donations made to the organization are tax-deductible for donors (U.S. Department of the Treasury, 2020). Nonprofit organizations are identified as public charities or private foundations. Public charities can be classified among eight primary groups; human service organizations have the most significant public charities percentage (America's Nonprofits, 2019). Organizations identified as nonprofit require that any profits earned are used to continue the organization's sustainment versus paid out to individuals or those classified as shareholders (America's

Nonprofits, 2019). Nonprofit organization leaders are focused on carrying out the organization's mission and taking part in activities that advocate for change and policy reform (Suárez & Esparza, 2017). Nonprofit leaders who understand the federal, state and local guidelines are better equipped to develop strategies and drive operational improvements for the organization.

With an understanding of how the nonprofit organization is regulated, leaders can identify opportunities for organizational growth, create and execute strategies, and work to support the organization's mission and vision. In previous research, nonprofit organization leaders were encouraged to plan for similarly operating the organization to an organization that is for-profit (Kennedy, 2018). When it comes to earning profits, nonprofit organization leaders can report successful earnings but would be required to use any profit to continue to support the organization's mission (Garven, 2015). Nonprofit organization leaders need to adhere to the rules and regulations governing the Internal Revenue 501(c)(3) status. However, it is also vital to ensure there are standards in place for the nonprofit organization's governance. Governance for nonprofit organizations can be a critical aspect of achieving successful outcomes. There are many elements to practicing effective governance of nonprofit organizations; one of the most crucial elements is relationship building. Researchers have noted that effective governance is ongoing, and relationships among the executive director and board members are crucial to achieving successful outcomes (Bruni-Bossio et al., 2016). Understanding how nonprofit organizations are defined and operate helps leaders and provides a background in preparation to apply strategies for improvement. In addition to developing prepared nonprofit organization leaders, there are opportunities to develop an operating board of directors to assist with overseeing the nonprofit organization's activities.

Nonprofit Boards of Directors

The nonprofit board of directors is tasked with playing an essential role in a nonprofit organization, such as providing resources and support to the organization's leaders. Additionally, members of nonprofit boards should work together in the community advocating for the organization and serving as representatives of the organization with the hope of gaining trust from community stakeholders (Aulgur, 2016). A board's effectiveness is somewhat subjective, multidimensional, and based on the objectives and interests of the board members (Van Puyvelde et al., 2018). The board chair's leadership style can have a significant role in how effective the board is in a nonprofit organization (Van Puyvelde et al., 2018). According to Van Puyvelde et al. (2018), leaders need to understand the extent of the influence nonprofit boards of directors can have on relationships with nonprofit organizations' stakeholders. The individuals serving on the nonprofit boards of directors can influence the norms of the organization. Having the capability to influence others can increase stakeholder engagement; however, board members must be active participants while serving as a nonprofit board member.

Nonprofit board members can be influential when efforts are made to seek resources that could benefit the organization as work takes place to accomplish the mission and vision. According to Brown (2007), having an active board in place is a critical necessity for a nonprofit organization to foster improved fiscal and organizational outcomes. Board members can add value to the organization through active participation in the decision-making processes (Hinna & Monteduro, 2017). The mission and vision of a nonprofit organization can be carried out with access to various resources. A board consisting of individuals with varying backgrounds and experiences can improve access to a vast amount of talent and resource availability (Brown, 2007). Active board development should include best practices that focus on (a) recruitment, (b) training, and (c) ongoing governance. With a commitment to establishing and following best practices, members of a nonprofit board of directors can advance collaboration efforts.

Collaboration and sharing common goals are important when individuals serve on the board of directors. Responsibilities of serving as board member might include providing management oversight and offering advice that keeps stakeholder rights at the forefront (Bradford et al., 2017). Board members should work together to focus on building upon a strategic plan with clearly identified goals for the future (Holland & Jackson, 1998). Participating in continuous improvement activities with a willingness to implement change helps foster the effectiveness of board members' actions (Aulgur, 2016). There were six dimensions of board competency necessary for successful governance (Holland & Jackson, 1998). These six elements were (a) contextual, (b) educational, (c) interpersonal, (d) analytical, (e) political, and (f) strategic (Holland & Jackson, 1998). Findings from the research conducted recommended board development focus on motivating board members to become engaged and committed to improving the organization's performance through individual development efforts and action plans (Holland & Jackson, 1998). Implementing a plan for ongoing activities to foster board development can increase opportunities for engaged and sustainable nonprofit boards of directors. A focus on nonprofit board member development can result in increased productivity and stakeholder engagement.

Board member engagement is recommended to be continuous, and keep in mind that as the organization changes and continues to grow, so must the approach to achieving successful outcomes. According to Northrop (2018), nonprofit board members must be willing and open to change to understand that what might work during one phase of development might not necessarily be best practice during another development phase. A critical element of board development is to have an assessment process to determine board effectiveness (Northrop, 2018). According to Maurer (2016), nonprofit board members are accountable for helping nonprofit organization leaders ensure there are adequate resources available to achieve the organization's mission. Maurer identified several themes relevant to the perceptions of nonprofit organization effectiveness. The themes identified include (a) cohesion and compromise, (b) commitment, (c) mistrust, (d) reciprocity, and (e) community (Maurer, 2016). It is critical to the board's overall success to have members on the nonprofit board of directors willing to work together to create a useful board with an outlined strategic plan. One of the goals for members serving on the board of directors should include plans to routinely review the organization's strategic plan to ensure the plan is still relevant to the organization's current and anticipated future needs. Strategies for closing any identified gaps in providing services, programs, or gaining access to available resources should include innovative ideas. Board members serving on nonprofit boards have a role in strategy development and innovation related to organizational growth (Jaskyte, 2017). Some of the responsibilities of nonprofit board members include (a) strategic planning, (b) assessing if there are adequate financial resources available, (c) monitoring the effectiveness of programs or services, and (d) promoting legal and ethical integrity is in place (Northrop, 2018). One-way board members can help acquire financial resources is by leveraging existing relationships in professional and personal networks (Jaskyte, 2017). Jaskyte defined innovation as the process of implementing (a) new ideas, (b) new processes or procedures, or (c) new services. Results from research conducted by Jaskyte suggested the relationship between how well board members implemented innovation depended on the type of innovation taking place. The board of directors is made up of individuals who influence the operational activities of an organization. The responsibility of nonprofit boards of directors varies among organizations. However, nonprofit organization leaders will benefit from understanding the best practice and recommendations for having active and engaged board members.

Innovation

With the environment and needs of those individuals being served continually changing, innovation is significant to nonprofit organizations' success. Innovation might help the nonprofit organization leaders focus on the customer's essential needs (Choi, 2016). According to AlMulhim (2020), focusing on innovation is critical for leaders who are working to achieve organizational sustainability. Internal marketing and customer orientation have been highlighted in previous research as having positive outcomes for nonprofit organizations (Choi, 2016). The findings from the study conducted by Choi

(2016) suggested that if leaders of an organization are responsive to the needs of the customer, the outcomes are more likely to be successful, and employees of the organization should be acknowledged as the primary stakeholders in the organization. Nonprofit organization leaders are more likely to improve outcomes with strategic planning efforts that focus on identifying the stakeholders' needs and seeking innovative ways to meet those needs. One strategy nonprofit organization leaders could implement to improve outcomes include exploring ways to enhance communication with stakeholders.

Nonprofit organization leaders are more likely to facilitate continuous change and promote growth opportunities by reviewing previous leaders' experiences. Nguyen and Cai (2016) researched the relationship between organizational learning from diversification efforts of other organizations' experiences and how these experiences may affect diversification's value. Researchers emphasized the significance of learning from others and how leaders can use previous business operations experiences to improve their outcomes (Nguyen & Cai, 2016). Engaging existing board members could help leaders interested in organizational learning based on previous experiences (Rupcic, 2019). In the research by Nguyen and Cai, the benefits of diversification were highlighted to include (a) enhance the value of an organization, (b) increase market power, (c) increase assets and resources, (d) reduce risks, and (e) financial and tax benefits. Nonprofit organization leaders have improved successful outcomes when learning from other leaders' wins and failures. Understanding what worked and what did not work for other nonprofit organization leaders could reduce waste while increasing access to resources. Having access to resources changes routinely with constant changes in the environment.

Changes in the environment may affect the availability of resources nonprofit organization leaders can access. According to Mataira et al. (2014), many nonprofit organization leaders depend on a significant portion of available funding to come from government or public sources. Nonprofit organization leaders usually receive revenue sources from (a) donations, (b) government funding, (c) revenue from services provided, and (d) investment income (von Schnurbein & Fritz, 2017). The limited availability of resources raises awareness of the importance of why nonprofit organization leaders need to demonstrate to potential donors the benefits of investing in the organization (Mataira et al., 2014). Specifically, nonprofit organizations are being held to higher standards related to receiving donations resulting in the need for increased accountability for meeting standards of care and services (Mataira et al., 2014). Mainly because of limited resource availability, nonprofit organization leaders should consider the increased vulnerability of the organization they are tasked with leading and focus on strategies that could help sustain the organization's operations. Identifying innovative strategies to manage the operational activities aimed at improving the organization's sustainability and longevity are ideal goals for nonprofit organization leaders.

Exploring innovative processes to manage nonprofit organizations' operational activities can be valuable in efforts to maintain the organization's sustainability. According to Svensson et al. (2020), nonprofit organization leaders can explore innovative ideas allowing for more flexibility. With recent changes in the nonprofit industry and increased focus on sustainability of organizations, there is a push to improve nonprofit organizations' management and professionalism (Khallouk & Robert, 2018). Potential obstacles to the effective management of nonprofit organizations include human resource management and limited financial resources Khallouk & Robert, 2018; Meyer & Leitner, 2018). There is an increased dependence on external funding and diverse stakeholders, and both factors may significantly make a difference in how successful management innovations can be adopted (Khallouk & Robert, 2018). Research conducted by Khallouk and Robert identified some of the challenges leaders might face in management innovation to include obstacles in (a) human resources, (b) organizational structure, (c) elevated costs, and (d) supply and demand needs. If nonprofit leaders focus on internal training and skill development, they could help the organization be more marketable to potential and existing stakeholders. Building relationships with potential and existing stakeholders is one way that nonprofit organization leaders can enhance marketing efforts.

Leaders who practice developing effective relationships are more likely to help implement strategies useful in obtaining the necessary resources to grow and sustain an organization. In previous research, utilizing information technology was suggested to assist leaders of organizations in building effective relationships with stakeholders (Olinski & Szamrowski, 2018). New advancements in technology have led to an increase in the number of stakeholders using web searches about an organization to gain information, allowing opportunities for improved communication between nonprofit organizations and stakeholders (Olinski & Szamrowski, 2018). Social media as a strategic approach to improving communication might increase nonprofit organizations' organizational capacity (Sun & Asencio, 2019). Recommendations for further research include exploring the relationship between nonprofit organizations using a web page and social media as a communication tool and the opportunity to create a dialogue (Olinski & Szamrowski, 2018; Vedel et al., 2020). Researching innovation and how nonprofit organization leaders can apply it helps address the research question for this study and identify strategies that can be introduced as recommendations for leaders. In addition, reviewing resources available to nonprofit organization leaders helps address this study's research question and will be the next topic in this literature review.

Nonprofit Resources

Nonprofit organization leaders often manage challenges associated with having limited access to resources. When nonprofit organization leaders do not have access to resources, there is an increased risk that services will not be available to the community members. In the next section of this study, the literature on how financial and human resources can affect nonprofit organization leaders' outcomes is reviewed.

Financial Resources

The financial vulnerability of nonprofit organizations and the effect of reduced funding from governmental sources can influence how effectively nonprofit organization leaders can meet the demands of providing services. The growth of nonprofit organizations has prompted an increased need for more fiscal responsibility and nonprofit organizations' management (Mitchell, 2017). In previous research, it was recommended that nonprofit organization leaders use available tools to determine the risk factor for and likelihood that the organization might experience financial instability (Burde, 2018). An improved method for determining the risk factor for financial instability is the hazard analysis. The hazard analysis identifies the time at risk as a significant variable in determining the nonprofit organization's risk to fail (Burde, 2018; Burde et al., 2017). Leaders need to be aware of an organization's financial status and the availability of resources for operating the organization. Understanding an organization's financial status raises awareness to identify why nonprofit organizations are not always sustainable and fail.

There is an increasing number of failed community-based programs in recent years. A community-based program offers services to the community grounded in healthcare, focusing on meeting various economic and social needs of the individuals and families served (Khodaparasti et al., 2017). Key factors identifying the reasons why the sustainability of community-based programs are essential include (a) the adverse effects failed community-based programs has on both the organization and the community, (b) the associated monetary costs and losses associated with failed community-based programs, and (c) the effect of failed community-based programs and the trust of these programs in the community moving forward (Ceptureanu et al., 2018). Research conducted highlighted that approximately 40% of community-based programs fail in a few years of opening (Ceptureanu et al., 2018). The sustainability of community-based programs is dependent on access to public funding (Dinnie & Holstead, 2018). There is an increasing number of community-based programs that are unable to sustain business operations. The failure of these community-based programs influences the future of sustainable new community-based program options in the community.

Having resources to sustain nonprofit organizations has been a challenge for leaders of community-based programs. The significance of sustainability as it relates to nonprofit organizations is described on three levels (a) individual, (b) organizational, and (c) community (Ceptureanu et al., 2018). Efforts to improve the community relationship can positively impact the success of community-based programs (de Vries & Pool, 2017). Recommendations for achieving sustainability of community-based programs include four factors (a) human resources, (b) organizational setting, (c) social and political environment, and (d) financial resources (Ceptureanu et al., 2018). Nonprofit organization leaders should consider strategic and beneficial ideas for the programs and services offered, as well as the organization and the community. Taking steps to improve access to financial resources will benefit nonprofit organizations' leaders when short and long-term goals are created.

The financial capacity and financial stability of an organization are elements that should be discussed routinely with identified stakeholders to help determine strategic plans for continuous improvement. According to Lin and Wang (2016), financial capacity and financial stability are identified as essential components of nonprofit organizations' financial performance. Nonprofit organization leaders manage the challenge of securing multiple sources for funding (Lu et al., 2019). The Great Recession of 2008 had a significant effect on the nonprofit industry, with a noted decrease in financial resources availability (Lin & Wang, 2016). As a result, many nonprofit organization leaders have been struggling with maintaining financial stability. However, despite the Great Recession, previous researchers have noted some nonprofit organization leaders who were able to maintain successful outcomes and provided an adequate level of services to their customers (Lin & Wang, 2016). Having the capacity to manage the demands of operating a nonprofit organization and securing and using resources to gain financial stability is one of the challenges leaders must deal with (Suykens et al., 2019). Nonprofit organization leaders could benefit from a better understanding of how to increase operating margins and equity ratio while limiting debts and operational costs (Lin & Wang, 2016). It is expected that nonprofit organization leaders can expect to have limited financial stability during crisis times. How nonprofit organization leaders manage finances for the organization during a time crisis will influence the organizational strategies and outcomes.

As many nonprofit organization leaders continue to face financial struggles, having the opportunity to form strategic partnerships can be beneficial to both organizations involved. However, leaders need to form partnerships carefully to ensure the organization's image is not compromised (Bocquet et al., 2020). In previous research, forming strategic partnerships between the nonprofit organization leaders and other business organizations or stakeholders has been noted to be beneficial (Álvarez-González et al., 2017). Nonprofit organization leaders can be in a position for long-term sustainability when alliances and partnerships are formed with other business organizations and stakeholders (Álvarez-González et al., 2017; Sanzo-Pérez et al., 2017). Partnering with nonprofit organizations allows business leaders to focus on opportunities to enhance corporate social responsibility efforts. Researchers suggest a benefit to having a partnership between nonprofit organizations and business organizations not just in terms of monetary donations but also in more useful resources, skills, and knowledge transfer (Álvarez-González et al., 2017). Furthermore, these partnerships should be formed with time-specific goals to achieve desired outcomes (AbouAssi et al., 2021). There is also an opportunity resulting from strategic partnerships that allow benefits from engaging in activities that help market the services and goods offered, allowing for increased success and potential for sustainability (Álvarez-González et al., 2017). When nonprofit organization leaders focus on internal marketing and professionalism, the outcomes might benefit the employees and the organization's overall success. Strategic partnerships can assist leaders in providing services aligned with meeting the organization's mission and goals.

Establishing value-added partnerships can improve the organizational strategic approach for nonprofit organization leaders. Nonprofit organization leaders might be able to achieve organizational growth by closely monitoring the behaviors and decisions of (a) private donors and (b) the government (Kim & Kim, 2018a; Kim & Kim, 2018b). In the past, funding for nonprofit organizations has been supplied primarily by government grants (Denison et al., 2019). Researchers have argued that encouraging a relationship between the government and nonprofit organization leaders could increase opportunities to provide services and foster collaboration (Kim & Kim, 2018a). This relationship would benefit the organization and the community as strategies are implemented to solve societal problems. Additionally, the benefits of collaboration between nonprofit organization leaders and the government might result in a better understanding of the factors driving nonprofit organizations' growth (Kim & Kim, 2018a). Researchers identified (a) earned income, (b) philanthropic contributions, and (c) government grants and subsidies as the significant sources of income for nonprofit organizations (Kim & Kim, 2018a). Increased collaboration can ensure that the allocation of resources is most useful and beneficial, serving the needs of the community. As nonprofit organization leaders form partnerships and increase collaboration, leaders need to be aware of the need for transparency in the organization's financial management.

Nonprofit organizations are gaining recognition for their contributions and services provided to the community. However, because of the increasing demand for nonprofit organizations' services, there is also more interest and investigation of how the financial aspects of nonprofit organizations are managed. A nonprofit organization's financial health is critical for stakeholder engagement and increasing awareness of how financial resources are allocated. Nonprofit organization leaders will benefit from reviewing the strategic plan for resource utilization regularly to determine if need for resources needs to increase.

Human Resources

Nonprofit organization leaders are challenged with access to limited financial resources and limited human resources. One could argue that limited financial resources regulate the ability to hire an adequate number of individuals. The concept of human resources capacity consists of having access to adequate volunteers and paid staff, including resources to offer continued professional development opportunities (AbouAssi

& Jo, 2017). There are many factors to consider when reviewing volunteer involvement in an organization, such as any required educational background or experiences needed (Nesbit et al., 2018). Taking action on any opportunity to increase efforts to recruit volunteers to help move the organization's mission forward would help fill the gaps created by limited financial resources. Recruiting efforts for gaining human resources should be creative and consistent to ensure qualified and available resources are being reviewed.

Access to skilled individuals to help perform the tasks necessary to meet the mission of nonprofit organizations leads to challenges for nonprofit organization leaders According to AbouAssi and Jo (2017), human resource capacity is a critical component of operating effectively for nonprofit organizations' leaders. Collaboration with partner agencies to ensure the service and programming needs are met is beneficial for all stakeholders involved (AbouAssi & Jo, 2017). Nonprofit organization leaders are faced with meeting expectations relevant to (a) performance, (b) efficiency, and (c) effectiveness (Bastida et al., 2018). There is a raised awareness regarding the need to have skilled and dedicated volunteers in the nonprofit industry, given the challenges faced with access to resources (Ang et al., 2017). The limitations related to increasing human resources might limit nonprofit organizations' operational functions, resulting in minimal growth and fewer services provided to the community. Implementing strategies to address recruitment efforts will allow nonprofit organization leaders to plan for success and adjust efforts as needed.

Strategic management efforts are critical to the success of nonprofit organizations. Nonprofit organization leaders are challenged with continuous changes and the need to meet accountability expectations from stakeholders in an industry with increasing competition for resources (Akingbola, 2012). A previous research study done in 2014 with findings documented by the Corporation for National and Community Service noted that 62.6 million people volunteered about 7.7 billion hours to organizations (Lee & Brudney, 2015). These hours would guide actions and influence decisions related to meeting the needs leaders are faced with when operating nonprofit organizations (Lee & Brudney, 2015). Volunteers are essential for nonprofit organizations to provide services to the community successfully. Nonprofit leaders are likely to benefit from strategic planning efforts directed at improving awareness for human resources. Having access to available resources reduces challenges leaders face in the nonprofit industry amidst continuous changes.

Leaders of small nonprofit organizations are faced with challenges that are different from those leaders managing larger nonprofit organizations. Leaders of small nonprofit organizations have minimal access to partnering or collaborating with other organizations because of limited organizational capacities (Kim & Peng, 2018). Incorporating strategies for human resource management practices will benefit nonprofit organizations' leaders to improve access to volunteers and implement a standardized, streamlined approach for engaging volunteers (Alfes et al., 2017). As the community's needs continue to change, so must the approach to managing resources needs to minimize the challenges faced by nonprofit organization leaders.

The purpose of this study was to explore strategies nonprofit organization leaders use to increase human and financial resources. Nonprofit organization leaders should consider taking strategic approaches to monitor changes in the environment, partner with other organizations, and make crucial decisions to operate effectively. Increasing resources when there is limited availability is challenging for nonprofit organization leaders. Recommendations on how to address these challenges are vital to facilitate successful outcomes for nonprofit organizations.

Organizational Capacity

Organizational capacity is a term used to describe how well leaders of organizations can function as it relates to having the resources and knowledge to achieve successful outcomes. Organizational capacity efforts can include areas such as (a) improving strategies for communicating, (b) increasing volunteer support, (c) improving fundraising efforts, and (d) ensuring there is a succession plan in place. Nonprofit organization leaders have focused on achieving improved performance and demonstrating to stakeholders' effective organizational practices (Andersson et al., 2015). Research conducted by Andersson et al. (2015) resulted in 3 areas of importance related to organizational capacity. These areas include (a) acknowledgment that organizational capacity is essential related to organizational outcomes, (b) levels of capacity vary depending on the nonprofit organization, and (c) there are challenges in fully understanding organizational capacity and the effect on organizational outcomes (Andersson et al., 2015). Findings from the research conducted suggest there is an opportunity for nonprofit organization leaders to improve organizational outcomes and performance by focusing on capacity building, in particular, the areas of (a) funding and (b) human resources (Andersson et al., 2015). The number of nonprofit organizations operating has grown significantly from 2005-2015, with 1.56 million nonprofit organizations registered with the Internal Revenue Service in 2015 compared to 1.41 million registered in 2005 (McKeever, 2018). Due to the continued growth in this sector, the access and availability to funding is limited and is leading to the need for nonprofit organization leaders to compete for resources (AbouAssi et al., 2019; Light, 2004). Targeted capacity building is the approach nonprofit organization leaders are taking to improve organizational outcomes (AbouAssi et al., 2019). AbouAssi et al. (2019) defined organizational capacity as an essential aspect relating to resources and skills available to carry out the organization's mission. Findings from research conducted suggest that nonprofit organizations' leaders focus efforts on building areas where there might be limited capacity existing. Some of the areas of capacity building include (a) strategic planning, (b) financial measures, (c) human measures, and (d) infrastructure (AbouAssi et al., 2019). Exploring opportunities for increasing organizational capacity benefit long-term strategic goals and achievement of outcomes. Nonprofit organization leaders who prioritize strategies for increasing collaborative efforts to increase stakeholder engagement and commitment guide plans toward sustainable outcomes.

Collaboration with other leaders and community stakeholders can result in positive outcomes for the nonprofit organization leaders. According to Bryan (2019), there remains a gap in understanding how organizational capacity relates to how effective an organization functions. It is vital to understand what capacity means as it relates to nonprofit organizations and understand how nonprofit organizations are measured as successful (Bryan, 2019). Some of the models for measuring success for a nonprofit organization include (a) goal attainment and (b) system resources (Bryan, 2019). Stakeholder support is critical to nonprofit organizations' success, and leveraging existing network capacity is identified as a tool to help build organizational capacity (Bryan, 2019). Understanding the relationship between capacity and organizational effectiveness will vary depending on the model used to define and measure what constitutes organizational effectiveness (Bryan, 2019). If leaders take a specific approach to achieving organizational capacity and defining what areas need the most attention, the likelihood of successful outcomes is higher. According to Light (2004), nonprofit organization leaders must address capacity-building strategies to improve and build trust among community stakeholders. Building capacity in an organization and understanding the effect of identifying areas that need improvement can benefit nonprofit organizations' leaders when planning a strategic approach to meet organizational goals. Understanding the benefits of capacity building related to the organization and forming the individual stakeholder's perspective is essential for nonprofit organization leaders.

Capacity building is essential not only from the individual, organizational perspectives but also from the overall community perspective. Improving the community's capacity is vital to help build more robust networks and improve outcomes for the community and increase and expand on existing resources (Kapucu & Demiroz, 2013). In previous research, a conceptual map of network capacity was created to demonstrate the connection between (a) organizational learning, (b) inter-organizational relations, and (c) how intervention strategies can influence collaborative capacity (Kapucu & Demiroz, 2013). Specifically, in rural areas, community members are faced with challenges that include not having access to adequate financial resources; additionally, nonprofit organization leaders face challenges associated with limitations due to geographical location (Walters, 2020). Efforts put forth to improve capacity building demonstrated a positive effect on relationships leading to improved organizational and community outcomes (Kapucu & Demiroz, 2013; Walters, 2020). The level of leadership and engagement are critical factors in building capacity. Performance measurement is another critical factor in the success of nonprofit organizations.

Nonprofit organization leaders are faced with many challenges related to securing available funding and resources to operate successfully. As a result, nonprofit organizational performance is being measured by several factors that include (a) input, (b) output, (c) process, and (d) outcome (Lee & Clerkin, 2017). With a growing number of nonprofit organizations located in various parts of the world, there is an awareness that regulations regarding financial processes are not standard (Almeida Prado Cestari et al., 2018). Building organizational capacity can directly influence organizational performance measures through the implementation of operational activities such as securing funding or staffing (Lee & Clerkin, 2017). Leaders who take the time to focus on improving processes and capacity building efforts are preparing the organization for long-term success to be foster positive outcomes in the communities served. Achieving long-term success and positive outcomes aligns with the overall mission and vision of most if not all nonprofit organizations.

This study's literature review was based on the strategies nonprofit organization leaders used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. Nonprofit organization leaders face challenges in increasing resources needed to sustain and grow as a successful organization. The stakeholder theory was used as the conceptual framework for this study to support recommendations for nonprofit organizations' leaders to apply in their efforts to increase human and financial resources. A qualitative single case study design was appropriate for exploring strategies available to nonprofit organizations' leaders to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission.

Transition

In Section 1, I included a literature review providing the research details on nonprofit organizations, leadership skills, innovation, nonprofit resources, and strategic planning. In addition, the literature review included information about organizational capacity, strategies used by nonprofit organization leaders to increase human and financial resources, and the stakeholder theory. The stakeholder theory was used as the conceptual framework for this study, supporting how nonprofit organization leaders use strategies to increase access to resources. When nonprofit organization leaders know strategies helpful for increasing access to human and financial resources, there are increased opportunities to sustain and grow the organization to address the mission.

The purpose of this qualitative single case study was to explore the strategies nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. There were three senior leaders of a nonprofit mental health organization in the southern region of the United States. The research findings presented in this study can positively affect nonprofit mental health organizations' leaders by providing strategies useful when trying to increase human and financial resources to help sustain organization operations and grow successfully. Leaders of nonprofit mental health organizations may use this research study's findings to implement strategies that help with increased resources that allow for improved organizational outcomes. This study's findings may lead to positive social change by providing nonprofit mental health organization leaders with strategies to create value for stakeholders, possibly leading to improved stakeholder engagement. Improved strategies to increase human and financial resources could increase the number of nonprofit organizations successfully providing services to the community.

In Section 2, I began by restating the purpose statement for this study and detailing my role as the researcher. Section 2 also included details about this study's participants, the research method and design, ethical research, and how data were collected and analyzed. In Section 3, I provided details about how I used the 2019-2020 Baldrige Excellence Framework to review the data collected for the nonprofit mental health organization. I focus on the (a) organizational profile, (b) leadership, (c) strategy, (d) measurement, analysis, and knowledge management, (e) operations, and (f) results. I concluded Section 3 by providing research findings and recommendations identified as a result of this case study.

Section 2: The Project

Section 2 includes a statement outlining the purpose of this study and the plan for researching effective strategies to increase human and financial resources used by leaders of small nonprofit organizations. The section provides an overview of the role of the researcher, the research method and design, details on the population sampled, and the method and technique for data collection and data organization. Additionally, I provide information on ethical best practices, data analysis, and reliability and validity. In this section, I also provide details on the type of data collected, the method for data collection, and the method for identifying themes for data analysis.

Purpose Statement

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. The target population consisted of three leaders of a mental health counseling nonprofit organization located in the southern region of the United States who had knowledge of their business operations and were empowered to make organizational decisions. The implications for positive social change include the potential to improve strategies for successful growth and sustainment of services, increasing opportunities to provide counseling assistance to community members in need of care.

Role of the Researcher

The role of the researcher is to review the literature and gather data to gain in-depth knowledge on the topic. The researcher in a qualitative study should begin the research process with an understanding of the components and critical steps involved. According to Yin (2018), one of the first steps in conducting qualitative research is identifying the case and what will be analyzed. The data collection should take place with the researcher involving multiple sources to triangulate sources (De Massis & Kotlar, 2014).

In this study, interviews with leaders of the nonprofit mental health counseling organization based in the southern region of the United States were the primary source of data. Interviews were conducted via telephone conference and review of organizational documents received by email. The interviews were semistructured and consisted of the responses from the organization's leaders to 10 scripted and open-ended questions. In addition to the interviews, I reviewed organization documents and information available to the public via search engines and the organization's website. The information collected was aligned with answering the research question for this study and addressing content based on the Baldrige Excellence Framework. As the researcher, I was responsible for using reliable and credible information in the data collection process.

A researcher benefits from incorporating an interview protocol to help guide the interview process and assist in gathering useful qualitative data (Castillo-Montoya, 2016; Yeong et al., 2018). I used an interview protocol (see Appendix A) to conduct appropriate, semistructured interviews. As the researcher, I focused on conducting participant interviews without bias and avoided preconceived notions. According to Yin (2018), researchers are neutral participants who present findings supporting theory and conceptual frameworks proving hypotheses and relationships. Member checking improves the quality of the data and assesses the information's validity (Madill & Sullivan, 2018; Thomas, 2017). In the researcher's role, I used member checking to minimize bias while completing this doctoral study.

The use of an interview protocol can improve how effective the interview process is and provide the researcher with more detailed data, providing a better understanding of the interviewees' experiences (Castillo-Montoya, 2016; Yeong et al., 2018). According to Castillo-Montoya (2016), incorporating an interview protocol framework can help improve outcomes for gathering data. The interview protocol framework includes four phases: (1) aligning interview questions with research questions, (2) guiding the conversation toward an inquiry-based format, (3) seeking feedback on interview protocols, and (4) testing the interview protocol before use (Yeong et al., 2018). All participants in this study received the interview questions, consent form, and confirmation of their participation before the interviews.

I had no existing relationship with the topic or the participants of this study before serving in the role of researcher. There was no knowledge or acquaintance with the nonprofit mental health organization leaders before the engagement as a scholar consultant. The Walden University administrators chose the client organization for the Doctor of Business Administration Consulting Capstone. According to Antes et al. (2018), researchers should follow the rule for scientific research and apply the principles of (a) honesty, (b) respect, (c) objectivity, and (d) openness. For this study, I served as the researcher and the nonprofit mental health organization consultant while completing the study.

The *Belmont Report* outlines the principles and guidelines for conducting research involving human subjects. Researchers should adhere to the following ethical principles found in the *Belmont Report* (1) respect for persons, (2) beneficence, and (3) justice (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research [NCPHSBBR], 1979). Respect for all participants ensures there are autonomy and protection of participants before, during, and after the study is complete (NCPHSBBR, 1979). Beneficence for participants helps to ensure that the participants' well-being is kept at the forefront (NCPHSBBR, 1979). Participants should be protected and have no harm or, at the least, minimal harm due to their participation in the study (NCPHSBBR, 1979). Justice for participants in the study references ensuring fairness and equal distribution of any benefits or burdens to all participants (NCPHSBBR, 1979). In adherence to the *Belmont Report's* requirements, I ensured the identities of the participants in this study were protected during the study and after the study was completed.

Any personal bias and attitudes of a researcher in this study were limited. Bias can come in many types related to the researcher, such as (a) conceptual bias, (b) anticipated outcome bias, or (c) question bias, resulting in a missed opportunity to present the experiences of the participants accurately (Wadams & Park, 2018). For this study's purpose, I needed to address and limit any adverse outcomes resulting from any personal bias, assumptions, and attitudes, including acknowledging feelings and past experiences, if any, related to the topic of the study.

Participants

Researchers identify participants who can provide knowledge relevant to the research question. In conducting interviews, the researcher interviews participants who can help complete the study (Morse, 2015). Participants in a study can share real-world experiences (Yin, 2018). Participants for this study included leaders representing a mental health counseling nonprofit organization located in the southern region of the United States. The participants in this study have knowledge about the operating processes in place at the mental health organization. The participants in this study were empowered to make decisions at the organization. The participants in this study used strategies to increase human and financial resources needed to sustain and effectively grow as a successful organization and address their mission.

The participants interviewed for this study included the executive director, office manager, and executive assistant. The Walden Consulting Capstone administrators and faculty select, review, and assign the client organization for scholar-consultants in the Doctor of Business Administration Consulting Capstone. Access to the participants was gained by contacting the executive director of the mental health counseling nonprofit organization via email and scheduling a conference call to discuss the scholar-consultant's role and the desired outcomes. During a series of scheduled conference calls, I gathered initial data about the organization and the role each of the leaders has in the organization. The mental health counseling nonprofit organization's executive director facilitated introductions and explained the scholar consultant's role via email to the office manager and executive assistant.

Establishing a working relationship with the participants was critical for gathering necessary organizational information for this study. During the initial months of engagement with the organization's leaders, I scheduled conference calls to take place several times a month. This consistent communication was valuable in establishing trust in the relationship. Acting to build a trusting relationship with participants is vital for the researcher and encourages confidence during the interview processes (Petrova et al., 2014). The information was gathered in compliance with the Walden IRB's approval of data sources and compliance with the Walden Doctor of Business Administration Research Agreement.

The participants included in this study had characteristics that were aligned with the overarching research question. Each leader had a significant role in the overall operations of the organization. The participants had different work backgrounds and educational backgrounds that contributed to their perspectives and experiences. Data collection should include a sample of participants included in the population where there is interest as opposed to including participants without direct experiences or knowledge of the topic (Watts et al., 2017). Each participant served a role in the organization that helped build upon the organization's mission and vision and was involved directly with efforts to increase resources available for continued sustainability and growth.

Research Method and Design

Research Method

I chose the qualitative research method for this consulting capstone research study. The qualitative methodology was chosen according to the guidelines documented in Walden University's *Manual for the Consulting Capstone Program* (Walden University, 2020a). Using the qualitative research method, I strengthened my research with the collection of data that provides readers information through the eyes of the individuals participating in the study. One advantage of using the qualitative research method is that the research presents information and theory from a new perspective, increasing the possibilities of a new understanding of a topic (Bansal et al., 2018). Another advantage of qualitative research is that researchers can reduce any burden of assumptions onto others and use a framework to present research outcomes that quickly result in social change in communities (Fassinger & Morrow, 2013). Researchers use semistructured interviews to gather data from the participant to answer the research question in qualitative studies (Yin, 2018).

Quantitative data analysis consists of collecting measurable and objective data to test the theory that researchers use in a deductive approach (Saunders et al., 2015). In quantitative research, there is a hypothesis and analysis of collected data using experimental research (Rutberg & Bouikidis, 2018). Researchers applying the quantitative method will identify the most appropriate measurement tools to analyze variables and present data to readers in an organized manner (Brunsdon, 2018). In quantitative research, the research is focused on presenting data analysis that answers questions related to what readers know or what readers think versus qualitative research that helps readers identify and understand the why behind the data (Barnham, 2010). The quantitative method was not appropriate for this study because no variables were included, the data collected were not measured using statistical tools, and there was no hypothesis.

Researchers who use mixed methods research approach encompass quantitative and qualitative research elements (Yin, 2018). A researcher using mixed methods combines quantitative and qualitative research elements as applicable to include data that is open and closed data (Wisdom & Creswell, 2013). Researchers who use mixed methods use data collected to answer research questions using findings from multiple data collection instruments, ensuring the research's quantitative and qualitative elements are identified (Stahl et al., 2019). Both quantitative and qualitative research methods were not used in this study; therefore, the mixed methods approach was not appropriate.

The qualitative research methodology was appropriate for this single case research study because I used the data collected to explore strategies leaders of small nonprofit organizations use to increase human and financial resources. Data collected for this qualitative research study included the results of semistructured interviews, reviewing organizational documents, reviewing social media, public data, and website information. In comparison, the quantitative research methodology and mixed methods were not suitable for this study. Overall, the qualitative research method was appropriate for this study because I explored and compared data collected and analyzed to provide findings and recommendations helpful to a nonprofit organization's leaders.

Research Design

Researchers using the qualitative method can choose from (a) case study, (b) ethnography, and (c) phenomenology designs (Yin, 2018). According to Yin (2018), opting for a case study design offers adequate data collection through multiple resources, interviews, or observations. There are many factors to consider when selecting an appropriate research design. However, it is vital to choose the research design best suited to support the research topic and allow for useful data collection. The case study design allows researchers to focus on a single case or multiple cases (Yin, 2018). The case can be related to an entire business or only a group of individuals in a business (Saunders et al., 2015). Case studies provide the researcher with useful information relative to an event or processes that have taken place, providing insight into how and why the specific topic of interest occurs (Saunders et al., 2015). Researchers using a single case study design can use analyzed data to answer the research question and provide findings and recommendations (Yin, 2018).

The Walden University Consulting Capstone requires scholar-consultants to conduct a single case study design (Walden University, 2020a). According to Yin (2018), in a multiple case study design, researchers collect data and explore strategies for two or more cases. The multiple case study design could not be selected for this doctoral study because of the rules and requirements outlined in the Walden University Consulting Capstone Program (Walden University, 2020a). The multiple case study design was not appropriate for this study because only one case was explored for this study. For this study, a research agreement was signed between Walden University and the client organization. Scholar-consultants in the Consulting Capstone Program are assigned to a client organization and required to collect organizational data and collaborate with client leaders to identify a business problem relative to the organization. As a scholar-consultant, I drafted a service order agreement for the client organization leader to outline the scope of work to be completed. The case study design was appropriate for this study because it ensured that the research's quality was adequate for answering the research question. The research question for this study addressed the strategies leaders of a small nonprofit organization use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. Selecting the single case study design for this research study was appropriate because I collected data from one client organization and conducted data analysis to present findings and recommendations.

Researchers use the ethnographic research design to explore data collected from a group of participants rather than participants on an individual basis (Walford, 2018). Researchers who use the ethnographic research design have in-depth engagement with the group of individuals the study targets (Palmer et al., 2018). Researchers using the ethnographic research design collect data through observations and conduct interviews (Cypress, 2018). Data collected for this study consisted of conducting interviews but did not include observations. The ethnographic design was not appropriate for this study because it was not focused on culture or group and did not include data collection through observations.

The phenomenological design is used by researchers who select participants who have experienced the events associated with the research question (Yin, 2018). Researchers can effectively analyze data from the evaluation of data collection and begin to answer the research question of the research study. Researchers using the phenomenology method focus on the participant's reflective human experiences (Adams & van Manen, 2017). Phenomenology research helps understand the meaning and details of experiences from the perspective of those living through the experiences (Roberts, 2013). An important concept for researchers using the phenomenological research method is the need to address any unique ideas or biases that may limit the ability to be objective (Hopkins et al., 2017). The phenomenological research design was not appropriate for this study because the purpose of this research was not to explore the lived experiences of the leaders working for the assigned client organization.

Researchers reach data saturation in qualitative studies when the data collected are sufficient to answer the research question, and there is no further information needed (Lowe et al., 2018). Data saturation differs for every study, and researchers can consider if they have reached data saturation if there are no new data or new themes presented (Fusch & Ness, 2015). According to Kerr et al. (2010), data saturation is related to the sample size in qualitative research. Data saturation is achieved when the data collected is enough for a credible analysis to take place (Kerr et al., 2010). The interview process for the three participants in this study and data collection took place to ensure data saturation until there were no new data related to the research question to be collected.

Population and Sampling

The population for this study consisted of individuals serving as senior leaders in a nonprofit mental health counseling organization. There were three participants serving in a leadership position at the nonprofit mental health counseling organization selected as the sample for this Doctor of Business Administration Consulting Capstone. As a scholar-consultant, I was selected to work directly with the organization’s leaders as a scholar-consultant. As part of a process put in place, Walden administrators and faculty review established Consulting Capstone criteria and requirements to deem the organization selected and assigned for scholar consultants in the Doctor of Business Administration Consulting Capstone. The three participants of this study were purposely selected because of their leadership role in the nonprofit mental health counseling organization.

Purposeful sampling is often used by researchers and requires the participants to meet the criteria outlined for the study (Acharya et al., 2013). Qualitative researchers use purposeful sampling to understand a phenomenon (Yin, 2018). Having an adequate sample size supports the researcher's ability to gather the data needed to logically and ethically address the research question (Burmeister & Aitken, 2012). The justification for the number of participants in this study resulted from the number of leaders working in the nonprofit mental health counseling center located in the southern region of the United States. When applicable, researchers should justify why a limited sample size is appropriate (van Rijnsoever, 2017).

The population was aligned with the research question to collect and analyze data to assess a small nonprofit organization's strategies to increase human and financial resources needed to sustain and effectively grow as a successful organization to address its mission. According to Boddy (2016), conducting research when there are limitations on the sample size can lead to valuable research and direction for additional studies that may be conducted. Having an adequate sample size is critical to the analysis of data (Yin, 2018). To help identify the appropriate sample size, researchers might review similar studies where data saturation was reached and use the information as a guide for how to reach data saturation (Marshall et al., 2013). Three participants were adequate to answer the research question for this single case study and provide in-depth knowledge for data collection and data saturation.

A researcher reaches data saturation when no new themes are observed during the data collection (Boddy, 2016). Reaching data saturation has been identified as a critical element of qualitative research (Lowe et al., 2018). Data saturation was reached after I conducted semistructured interviews with the participants of this study. Data were collected until there were no new themes identified. A review of organizational records shared, policies, and public data were beneficial in achieving data triangulation. Data triangulation can help researchers achieve data saturation (Fusch & Ness, 2015).

Researchers conducting interviews can collect data relevant to the study's topic based on the participants' personal experiences (Yin, 2018). Interviews were conducted via conference call with all participants of this study. Conducting interviews to collect data provides the opportunity for researchers to ask probing questions with minimal objections from participants (Block & Erskine, 2012). No interviews took place face-to-face with participants. Semistructured interviews were conducted with participants virtually in compliance with Walden University's IRB guidelines. The guidelines state that scholar-consultants could not conduct interviews at the location of the assigned client organization. The interview process included open-ended questions with data collection and information analysis to identify strategies for improving human and financial resources. Asking open-ended questions creates an opportunity for participants to explain the meaning of their responses (Riiskjaer et al., 2012).

Ethical Research

Researchers are required to receive approval from the IRB to conduct research using human subjects before starting the research (Parker, 2016). Research with this study participants started after receiving approval from Walden University's IRB (approval number 11-05-18-0584684). Receiving approval from the IRB before the research starts reduces risk or potential harm to the human subjects participating in the research (Parker, 2016).

A consent form was provided to the study participants before the start of the research, and it included information related to the purpose of the study. The consent form also included information about the participant's rights and the Walden University representative's contact information if there were any questions about the IRB approval. Informed consent should be obtained from participants only after an adequate explanation of all options, anticipated risks, and any benefits to be expected as a result of agreeing to participate (Simkulet, 2019). Participation in this study was voluntary, and participants were made aware of their right to withdraw from the study. Participants in the study were asked for permission to record the interview's audio before the start of the interview process. Participants of the study received an explanation of the process for member checking to ensure this data's reliability and validity.

When the interviews with senior-level leaders were completed, the information was analyzed, and additional archival information was collected and included in the study. The interviews' transcription and recording are available upon request for 5 years following this study's completion. The information included in my study did not reveal the identity of the participants. Each participant was assigned a number to protect their identity and privacy. Participants in the study were given an assigned number, such as Participants one, two, and three.

Qualitative researchers are expected to explain to participants how data will be collected and how data will be used during the process of obtaining consent (Sanjari et al., 2014). Before starting the interview process, participants were aware of their right to refuse to answer any question they were not comfortable answering. Before interviews were conducted to gather data, each participant was provided a copy of the consent form via email. Participants were made aware of their right to consent or deny participation in the interview process. Participants were asked to review the consent form's content and reply via email with the verbiage “I consent” if consent was granted.

Taking part in this study was voluntary for participants. Participants in this study were not provided any incentives for agreeing to participate in this study. Payment or incentives in any form cannot be considered the benefit when asking participants to agree to take part in a study (Ross, 2019). The participants agreed to participate in the study to understand how the information provided could help research provide beneficial strategies for the leaders of the nonprofit organization.

Researchers are responsible for protecting the data collected and keeping all information about participants confidential (Kendall & Halliday, 2014). The participants in this study received ethical protection. The names, roles, and other personal or identifying information of the participants were kept confidential and secured. Protecting participants in a study can be achieved when the researcher maintains confidentiality and masks the participants' identity and organization. Participants' personal information was kept confidential and secured by assigning each participant a pseudonym. Furthermore, I removed any personal and identifying information about the participants from the study. All organizational and personal information was secured on a password-protected computer as an additional measure to ensure any sensitive data collected as part of this study were protected and secured.

All documents and data received were kept in a secure location in my home and will be destroyed 5 years after completing the study. Destroying all documents and data after 5 years might help protect the participants' rights in this study. I was the only person with access to the documents and data. The published study did not contain the name of the organization or the names of the participants. Researchers must protect the information collected and used in the research study (Yin, 2018).

Data Collection Instruments

Data collection for this qualitative single case study took place after attaining IRB approval from Walden University IRB. For this study, I functioned as the primary instrument to collect data. In qualitative research studies, the researcher serves as the primary instrument and should minimize bias and assumptions when collecting data (Clark & Veale, 2018). Data collection took place through conducting semistructured interviews, reviewing archival records, and obtaining public data available through the Internet. According to Yin (2018), data collection for case studies must come from at least two of the six available sources; (a) documentation, (b) archival records, (c) interviews, (d) direct observations, (e) participant-observations, and (f) physical artifacts. To achieve data saturation, I collected data until no new themes emerged.

The data collection process consisted of 10 open-ended interview questions. An interview protocol was used during the interview process (see Appendix A). An interview protocol is designed to help obtain quality data relevant to all research objectives (Yeong et al., 2018). The interview process consisted of the researcher asking the open-ended interview questions, taking notes, and audio-recording the participant's responses. Participants were asked follow-up questions during the interview process to assist the researcher in gaining additional insight. During the interview process, the researcher should practice active listening techniques and make efforts to help the interviewee feel relaxed and willing to share information (Miller, 2017). The data collected were validated using the process of triangulation. Triangulation of data can be conducted by reviewing multiple sources of data collected (Yin, 2018). The collection of organizational documents for this study consisted of the existing mission and vision statement, bylaws, website data, social media data, public financial data, and board member data. For this study, I reviewed all organization documents received by senior-level leaders of the organization for the reliability of data collected during the interview process.

Data were also collected using the 2019-2020 Baldrige Excellence Framework (Baldrige Performance Excellence Program, 2019). I used the Baldrige Excellence Framework as a guide for data collection in compliance with the Walden University Doctor of Business Administration Consulting Capstone requirements. The Baldrige framework was used to support the researcher collecting data based on (a) leadership; (b) strategy; (c) customers; (d) workforce; (e) operations; (f) measurement, analysis, and knowledge management; and (g) results (Baldrige Performance Excellence Program, 2019). Organizational data were collected using the Baldrige Excellence Framework tool to help drive the participants' questions in the study related to the operational activities of the nonprofit organization. The Baldrige Excellence Framework tool was used to increase the understanding of the nonprofit organization's strengths and opportunities for improvement related to key work processes and performance outcomes.

Member checking is conducted as a technique to prove the credibility of data collected (Liao & Hitchcock, 2018). Member checking was completed to ensure the data collected during the interviews was reliable and valid. Researchers use member checking to support the consistency and accuracy of interpreting data collected during the interview process (Morse, 2015). The process for member checking included the researcher transcribing the interview data. After transcribing the data collected during the interview, the researcher provided each participant with a summary of interpreted responses.

Data Collection Technique

The data collection techniques used for this qualitative single case study were semistructured interviews and a review of transcripts, notes taken during the interview, a review of archival documents, and a review of publicly available data and information that was provided by the client organization leadership, such as survey results, and strategic plans. The data collection technique can shape the quality of the findings presented in the study (Gibbs et al., 2007). For this study, I used an interview protocol (see Appendix A) to conduct semistructured interviews. An interview protocol is the best approach for researchers conducting interviews (Yin, 2018). Interview sessions were conducted in 30-minutes in length for each participant. The best time and date were determined and confirmed by telephone conservations and email exchanges. Each participant participated in two interview sessions via telephone for data collection. The semistructured interview questions were in alignment with the research question and the 2019-2020 Baldrige Excellence Framework.

There are disadvantages to collecting data by conducting interviews with participants. A disadvantage of conducting interviews is the interviewer's possibility of influencing the responses of the interviewee, leading to risks in the validity of the data (Yin, 2018). The responsibility of collecting quality data is the researcher's burden, as is the case in conducting interviews and maintaining an excellent balance to facilitate adequate data collection (Anyan, 2013). This responsibility could be viewed as a disadvantage for researchers in a qualitative study. Researchers with personal bias can also be a disadvantage when conducting interviews (Windsong, 2018). Personal bias can influence the data collection and reduce research credibility, raising awareness of the need for researchers to acknowledge and be aware of these biases to reduce adverse outcomes on the research process (Clark & Veale, 2018).

Researchers should also be aware of the advantages when collecting data by conducting interviews with participants. One advantage of collecting data via the interview process in a qualitative case study is the use of semistructured interviews with participants of the study (Robinson, 2014). According to Yin (2018), another advantage includes reviewing organizational documents to support methodological triangulation and provide additional data relevant to answering the research question. Engaging in real-time dialogue with participants during the semistructured interview process is advantageous for researchers (Pietkiewicz & Smith, 2014). As the researcher for this study, I was aware of potential disadvantages and advantages during data collection and I followed the steps outlined in the data-collection process to ensure the technique used was appropriate.

Member checking is used to verify the data collected during the participant interviews is interpreted accurately (Harvey, 2015). In previous research, member checking was identified as a process to ensure research findings were reflective of the study participants' experiences (Varpio et al., 2017). During the research process, I used an interview protocol when conducting interviews, followed by member checking to validate accurate data collection. Utilizing multiple sources of evidence and triangulation of sources in the data collection process allows the researcher to highlight any trends identified in the research findings. When the researcher identifies trends during the data collection process, these trends can support the research topic and demonstrate the validity of findings to readers (Hussein, 2009).

Data Organization Techniques

I stored the information collected during data collection was organized in an electronic file folder on a flash drive device. The data collected were organized, labeled, and cataloged on the flash drive device. Data collected and stored on this flash drive device included interview questions and interview transcripts from the participants in this study, email communications, organizational documents received electronically, and interview notes. According to Yin (2018), researchers benefit from having an organized system and data collection approach. Organization techniques used for this study included Storing the data collected in an organized and electronic form, keeping track of all data collected, and allowing for access to the information quickly and efficiently. Files stored on the flash drive device are organized and categorized with labels and dates. The file was stored electronically using a flash drive device kept locked in a secure cabinet accessible only to the researcher. All electronic documents for this study were stored on password protected file on my computer.

Organization techniques used for this study included conducting semistructured interviews and recording the participants' responses in the study. Furthermore, data organization techniques included taking notes during the interviews, using a communication journal, member checking, and transcribing interviews. Interviews were transcribed using NVivo transcription software. Transcription of interviews took place in one week of interviews being conducted with participants.

Qualitative researchers are responsible for providing details of the data collection process to include descriptions of instruments such as audio devices (O'Brien et al., 2014). Interviews were recorded using the electronic record option during the conference call platform used to conduct interviews. For data organization techniques, the recording application available on a Samsung Galaxy phone was used as a secondary device. Advantages of using a device to record audio during the interview include the researcher's ability to collect accurate data and the opportunity to listen to the recording during the analysis of data (Saunders et al., 2015). To keep the files organized, I downloaded recordings of the interviews, labeled, and saved the interviews on an electronic flash drive device. Following the interview process, the interview's audio recording should be saved to a computer from the device used to collect the data (Setia, 2017). After the interview process was complete, I transcribed the interview audio recordings, and created electronic files of the documents. Additionally, I organized, labeled appropriately, and stored the documents on a password-protected computer. To identify themes or trends after organizing the data collected, I used a coding technique. All data collected to include audio recordings, transcripts, and documents, will be kept stored safely for 5 years in my home with access limited to the researcher only. After the 5 years have passed, all documentation will be destroyed appropriately to ensure the organization's identity or participants is kept confidential.

Data Analysis

Methodological triangulation was the approach I used to analyze the data collected for this case study. Methodological triangulation of sources is used to help foster the validity of data collected in qualitative research (Yin, 2018). In this study, methodological triangulation was achieved after I reviewed the sources of data collected, existing literature, and identified patterns or themes. The data sources used to identify patterns included reviewing the organization's existing mission and vision statement, bylaws, website data, social media data, public financial data, board member data, and data collected during semistructured interviews. Identifying patterns based on data collected can explain how specific processes or decisions are made and any related reasons for these processes or decisions (Yin, 2018). Using the pattern matching analysis could strengthen findings if the analysis demonstrates relevant similarities (Yin, 2018). Analysis of the data collection will also lead to research propositions as similarities are identified (Saunders et al., 2015). Data analysis is critical to the research process in qualitative research; however, there are continued challenges in understanding the process for data analysis (Raskind et al., 2019).

Member checking is conducted to help to verify the interpretation of the data collected for accuracy (Birt et al., 2016). For this study, I collected (a) data that was available to the public, (b) information from the organization's website, (c) the mission and values statements, (d) organization bylaws, and (e) data collected from the interview process. For this study, I analyzed the data collected to identify critical themes I used to explore strategies nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. Yin (2018) identified pattern matching as a method for data analysis when conducting case studies. During the interview process, I took detailed notes and recorded the conversation with the study participants. Furthermore, I used the 2019-2020 Baldrige Excellence Framework as a guide when collecting and analyzing data for this case study.

The data analysis process for this study started with reviewing the transcriptions of the interviews conducted. Likewise, I reviewed the transcriptions against the audio recordings of the interviews for accuracy. Additionally, I reviewed notes taken during the interviews to ensure each participant's interview responses were interpreted accurately. NVivo software was used to identify codes and themes derived from the interviews conducted with this study's participants. The use of software can help researchers strategize to quickly identify codes and themes in the data analysis process (Blaney et al., 2014). Coding of data can help identify key themes to foster an understanding of the participant experiences' similarities and differences (Chowdhury, 2015). Data analysis software is beneficial to researchers by reducing the time needed to complete the process and the accuracy of identifying themes (Oliveira et al., 2016). I used NVivo software to code and identified themes used to communicate strategies nonprofit organization leaders can use to increase human and financial resources. Additionally, I used methodological triangulation to relate the findings to the existing literature of my conceptual framework and present information on how the strategies presented can help answer the research question.

Reliability and Validity

Reliability

Awareness of the potential bias and data quality issues affecting the reliability and validity of qualitative research data analysis is valuable in the research process. According to Bartholet (2014), misuse of research can occur when the researcher does not ensure a robust research approach with data collection. Presenting inaccurate data can negatively influence others to take further action or form opinions driven by false information (Fedina, 2015). Research studies can be evaluated for reliability by assessing the findings and measurement tools used in the data collection (Heale & Twycross, 2015). Sources for data quality issues that could negatively affect a doctoral research study might include bias directly from the researcher or the participant (Saunders et al., 2015).

According to Yin (2018), the four data collection principles are beneficial in solidifying the reliability of sources used in research projects. The four principles of data collection consist of (a) multiple sources, (b) database, (c) chain of evidence, and (d) caution related to the use of social media sources (Yin, 2018). Dependability for the data collected was ensured with methodological triangulation methods. For this study, I used methodological triangulation to improve my study's reliability and credibility by reviewing several sources of data collection. Data were collected via methods to include conducting interviews with organizational leaders, reviewing organizational documents, and reviewing public data. Using the 2019-2020 Baldrige Excellence Framework, I collected data related to the organization's operational and leadership procedures from the participants of the study. In addition, I conducted member checking with the study participants to ensure the accuracy and dependability of the data collected. The process of member checking was completed when I provided participants of the study with a summary of their interview responses to review for accurate interpretation. Reliability and validity in a Doctor of Business Administration doctoral research study can improve data findings' accuracy (Haradhan, 2017).

Validity

There are several tasks researchers can complete to ensure the validity of a study. According to Morse (2015), researchers can help ensure valid research findings by committing to a significant length of time for engagement and sufficient observations and awareness of any existing personal bias. Validity in qualitative research is valuable to help ensure the research findings are of good quality. Quality research studies include a clearly defined problem, valid research questions, and a decent sample size to investigate or explore the problem. For this study, I used member checking as part of the data collection process. Member checking included reviewing the transcribed interview data and sharing the transcript summaries with the study participants to ensure the information was captured accurately.

Credibility

Credibility in qualitative research is achieved using methodological triangulation of data sources (Marshall & Rossman, 2016). The challenge of determining a quality research study should consider if the chosen research method and design are appropriate for the study (Martensson et al., 2016). Credibility in qualitative research can be achieved through member checking with participants of the study (Saunders et al., 2015). For this study, I demonstrated credibility through member checking with the participants of this study. The member checking process included transcribing data collected from semistructured interviews with participants, providing participants with the transcript summaries, and reviewing the data to ensure it was accurate. Additionally, I used methodological triangulation of data collected to ensure credibility. Methodological triangulation requires a researcher to use multiple methods and sources of data to confirm and improve the validity of the findings presented to help understand the topic (Bekhet & Zauszniewski, 2012).

Transferability

Transferability in qualitative research refers to the researcher providing details on the interview questions, research design, and findings to readers (Saunders et al., 2015). The researcher presents data to readers to promote an understanding of the information and the relevance to the research question and research findings. According to Korstjens and Moser (2017b), transferability in qualitative research is possible when the findings can be transferred in a different setting using different participants. Readers must have the necessary experience or knowledge for the transferability of the research study data and findings (Hancock et al., 2016). For this study, I included details about the participants, research design, and process of collecting and analyzing data. By providing detailed information on the participants, research design, data collection process, and findings, I allowed for the transferability of this research and future research using similar processes.

Confirmability

Using a strategic research methodology can confirm the interpretation of the research findings. Confirmability in qualitative research refers to whether the research findings of a study can be confirmed by someone other than the researcher (Korstjens & Moser, 2017a). Confirmability in qualitative research can be achieved when the researcher provides details about how the data were collected and how the findings were made (Ellis, 2019). A researcher must also ensure the data collected and findings presented cannot be mistaken for resulting under false claims but rather a result of the data collected (Korstjens & Moser, 2017b). There are several strategies researchers can use to enhance the validity of research findings. For this study, I demonstrated confirmability using probing interview questions, member checking, and methodological triangulation of data collected from multiple sources.

Data Saturation

Data saturation is ensured by collecting and analyzing data until no new themes or patterns are identified (Heale & Twycross, 2015). During the interview process, I followed the interview protocol (see Appendix A) and used the interview questions as a guide to ensure the data collected were rich. If a researcher does not reach data saturation, the quality of the research will be negatively affected (Fusch & Ness, 2015). Achieving data saturation in research supports the findings and conclusions presented (Lowe et al., 2018). For this study, I achieved data saturation by collecting data from multiple sources and conducting interviews with all identified senior leaders working in the assigned client organization.

Transition and Summary

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. As the data collection instrument, I conducted semistructured interviews and collected organization document data to answer the research question. With purposeful sampling, there were three senior leaders selected from the mental health nonprofit organization to participate in this study. The sample size was adequate to collect enough data to reach data saturation. As the researcher, I adhered to ethical guidelines while conducting research for this study.

The data I collected for this study included a review of public data, information from the organization’s website, mission and values statements, organization by-laws, internal organization documents, and social media sites. The data were collected during semistructured interviews I conducted with three senior leaders of the nonprofit organization. Using NVivo software, I conducted data analysis to identify themes used in determining research findings. Member checking and methodological triangulation were used to ensure the reliability and validity of the data collected.

In Section 3, I used the 2019-2020 Baldrige Excellence Framework in collaboration with the data collected to conduct a review of the organization and provide strategies for the mental health nonprofit organization's leaders. Information will be presented in the following areas (a) organizational profile, (b) leadership, (c) strategy, (d) measurement, analysis, and knowledge management, (e) operations, and (f) results. I concluded Section 3 of this study by providing a presentation of findings, recommendations for future research, recommendations for the client organization, and social change implications.

Section 3: Organizational Profile

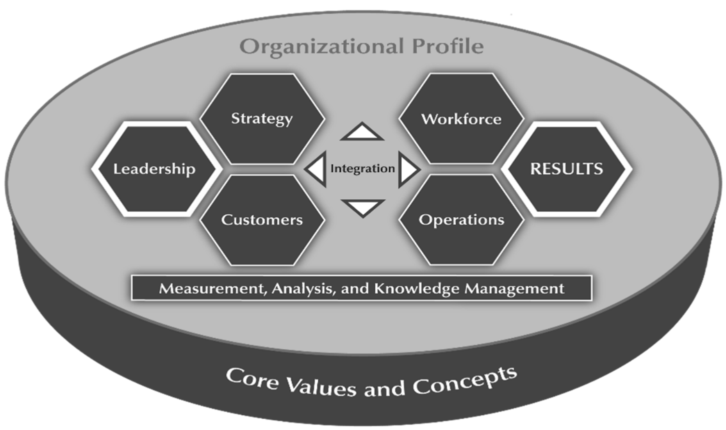
JJMU, a pseudonym, is a 501(c)(3) mental health counseling nonprofit organization located in the southern region of the United States. The organization was founded in 1998 to provide mental health services to the community after identifying a need for access to affordable care. The organization was founded with local support from the faith-based community. With support from local partners, funding from grants, and community stakeholders, leaders at JJMU have provided continued mental health services to families in the community for over 20 years.

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. After completing semistructured interviews with participants of this study, data analysis took place to identify thematic findings. Thematic analysis of the data identified the following themes: (a) effective fundraising strategies, (b) community involvement, (c) board effectiveness, (d) strategic planning, and (e) effective recruitment strategies. In Section 3 of this study, I used The Baldrige Excellence Framework to analyze how leaders at JJMU work to accomplish the organization's mission and vision.

The organizational profile includes essential information that served as a background when applying the Baldrige Excellence Framework (Baldrige Performance Excellence Program, 2019) to an organization. The Baldrige Excellence Framework (see Figure 1) consists of seven categories incorporated into a system with a focus on the organization’s mission, vision, and values. Leaders of organizations use the seven categories of the Baldrige Excellence Framework to identify processes and review results achieved (Baldrige Performance Excellence Program, 2019). The categories are critical elements of the criteria needed to help leaders of organizations achieve successful outcomes (Baldrige Performance Excellence Program, 2019).

Figure 1

From the Baldrige Performance Excellence Program. 2019. 2019-2020 Baldrige Excellence Framework: Proven Leadership and Management Practices for High Performance. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology.



From Baldrige Performance Excellence Program. 2019. *2019–2020 Baldrige Excellence Framework: Proven Leadership and Management Practices for High Performance*. Gaithersburg, MD: U.S. Department of Commerce, National Institute of Standards and Technology. https://www.nist.gov/baldrige.

Key Factors Worksheet

Organizational Description

The purpose of this qualitative single case study was to explore the strategies nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. JJMU, a pseudonym, is a 501(c)(3) nonprofit organization that provides mental health counseling services to individuals located in the southern region of the United States. The leadership team at JJMU consists of three individuals who work together and collaborate to manage the organization's operational needs. JJMU has seven employees and volunteers serving the needs of individuals seeking counseling services for various conditions. Services are provided to individuals and families who are insured, uninsured, or underinsured. For those seeking counseling services who do not have the means to pay for services, efforts are made to provide assistance and support to ensure all individuals can be helped.

Organizational Environment

Product Offerings. The employees of JJMU provide support and counseling services to adults and adolescents to address conditions such as depression, behavioral, drug, and alcohol addictions, anxiety, eating disorders, and adolescence or childhood trauma and conflict. Services are provided on an outpatient basis to individuals, families, or in a group setting. Additional services provided include educational sessions or seminars, and workshops. The leadership team of JJMU is in the process of preparing to obtain approval to provide telemental health services in addition to face-to-face sessions. Telemental health services allow professional counseling services to be delivered to the client via the phone or videoconferencing technology. Also, telemental health services might be provided using email or chat services. Counseling services are provided at three office locations throughout specified counties in the southern region of the United States. Professional counselors provide mental health counseling services that follow the American Counseling Association code of ethics. With collaboration from local agencies, referrals, and community advocates, counselors at JJMU can meet the needs of clients seeking help.

Mission, Vision, and Values. The mission of JJMU is to provide services with a faith-based foundation to support individuals, families, and groups seeking mental health counseling services. Through a network of trained counselors, program development, and local faith-based partners' support, JJMU offers the community excellent care and counseling services. The vision for JJMU is a focus on healing and empowering grounded in faith-based beliefs. Leaders of JJMU believe following the organization's vision will allow for increased community access to mental health services. In the future, leaders of JJMU have a vision that the organization will continue to grow and have the resources needed to offer multiple programming and services to members of the community.

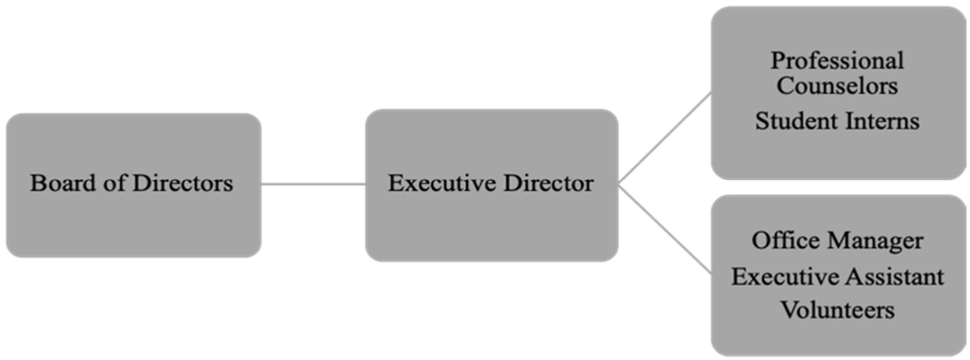
The leadership team, employees, and volunteers of JJMU genuinely care about the individuals and families who visit the centers to receive counseling services. The leadership team and workforce of JJMU make intentional efforts to connect with the local community and reduce any stigma associated with seeking mental health counseling services. Providing care and support to those in need with integrity and respect is a valued principle of the workforce and leaders of JJMU. Through autonomy, professional counselors can serve the needs of individuals and families seeking services.

Workforce Profile. The workforce profile for JJMU consists of an executive director (ED) who also serves as a professional counselor, seven additional professional counselors, one executive assistant (position currently vacant), one office manager, and a board of directors. Occasionally, student interns are part of the workforce profile at JJMU. The ED, professional counselors, and office manager are paid positions. The ED provides executive oversight and manages the day-to-day operations of the organization. The office manager provides scheduling, office, and billing support for the organization. The executive assistant provided bookkeeping support for the organization; however, this workforce member has recently resigned from the position. The position is currently vacant.

In the past year, there have been some changes in the workforce profile at JJMU, with the loss of a few support staff due to various reasons. Figure 2 illustrates the workforce profile for JJMU. There are no organized bargaining units at the JJMU organization. All professional counselors at JJMU must meet licensing standards and regulations to ensure adherence to professional standards set forth by the governing board for counseling. According to Participant 1, the underlying driver that engages the workforce at JJMU is when clients are in crisis and supporting individuals and families during the crisis.

Figure 2

JJMU Workforce Profile



Assets. The assets for JJMU consist of a few furniture items, desktop computers, phones, and accounts receivable. JJMU sessions are held in rented spaces or facilities shared at no cost to the organization. Assets for JJMU totaled $119, 605 in 2018 compared to $62,375 in 2017.

Regulatory Requirements. JJMU is a nonprofit organization and has tax-exempt status under section 501(c)(3) of the Internal Revenue Code of the Internal Revenue Service. The leaders of JJMU adhere to the state and federal requirements to meet the tax-exempt status under section 501(c)(3) of the Internal Revenue Code. An element of maintaining tax-exempt status under section 501(c)(3) of the Internal Revenue Code is to file an IRS Form 990 annually. A copy of IRS Form 990 for tax years 2016, 2017, and 2018 were retrieved from GuideStar. There are written by-laws to govern the activities and policies for the leaders and support staff at JJMU to include the ED, counselors, and support staff. Professional counselors are governed and regulated by the state to meet and adhere to ethical and professional standards for providing counseling services.

The leaders of JJMU are required to meet the expectations set by governing bodies at the federal, state, and local levels. Adhering to these expectations aligns with the principles of the stakeholder theory. According to Freeman (1984), stakeholders include customers and employees and partners and suppliers. Leaders at JJMU demonstrate to stakeholders' value-added activities that will ensure the organization is compliant with standards and expectations outlined by federal, state, and local guidelines. Leaders at JJMU take action to comply with federal, state, and local guidelines that demonstrate a strategic approach for increasing resources. Regarding the research question for this study, without the deployment of this strategic approach, the JJMU organization would not meet standards for government and grant funding qualification.

Organizational Relationships

Organizational Structure. JJMU provides mental health counseling services in a face-to-face setting. The center is a nonprofit organization providing services located in three counties in the southern region of the United States. The organizational structure of JJMU consists of an ED responsible for oversight of the day-to-day operations. The office manager and executive assistant provide additional support and assistance to meet the organization's operational needs.

A board of directors governs JJMU. The by-laws of JJMU explain the criteria for membership in what is identified as a nonprofit corporation. Membership in this nonprofit corporation is established when the board of directors accepts requests from church organizations. The church organization's leaders commit to making a mandatory contribution of at least $500 to JJMU annually. Once a membership is established in this nonprofit corporation, the church organization is granted two seats on the organization's board. Membership currently consists of 11 church organizations participating in the nonprofit corporation governing JJMU.

Customers and Stakeholders. The key market segment for JJMU is the local community where services are offered. The center services individuals and families based on referrals from the member churches and other community stakeholders such as other local healthcare providers. The key stakeholders for JJMU include the community members in the geographical area serviced, healthcare professionals, members of the nonprofit corporation, local institutions of higher education, and the board of directors (see Table 1). The market segments for JJMU are three counties located in the southern region of the United States.

Table 1

Key Customers and Stakeholder Requirements

Key customers and stakeholders	Key requirements	Alignment
Community members	Individuals and families in the local community	JJMU staff and leaders provide services and programs to align with the needs of the community members
Workforce	Skilled, knowledgeable, and supportive in the work setting	JJMU leaders work together to ensure staff members can provide services and programs aligned with the mission and vision of the organization
Local institutions	Work with organization to provide skilled student interns and graduates	Maintain relationships to ensure there are continued opportunities for students
Board of Directors	Accountable for compliance and adherence to organizational by-laws, policies, procedures, budget, local, federal laws, and the mission and vision of the organization	Evaluate, and monitor organizational strategies in support of the mission and vision. Develop and implement new strategies when necessary to align with the mission and vision of the organization

Suppliers, Partners, and Collaborators. JJMU suppliers and partners are at the center of the organization. The leaders of JJMU work closely with community partners to build trusting relationships. JJMU leaders and staff members collaborate with local community leaders, organizations, local institutions for higher education, and funding institutions (see Table 2). Leaders and staff of JJMU actively participate in local community events, serve on local community boards, and work consistently to increase awareness of services provided by the center. JJMU hosts several community events throughout the year to promote services and reduce stigmas associated with mental health counseling.

Leaders of JJMU use a combination of tools to increase awareness of the services offered and connect with local suppliers and partners in the community. Tools used by the leaders of JJMU to engage with partners and suppliers include social media, attendance at local community events, attendance at a supplier or partnered sponsored events, and educational and civic activities. Communication with suppliers and partners is ongoing throughout the year.

Table 2

Key Supplier and Partner Requirements

Key suppliers/partners	Key requirements	Alignment
Counselors	Support the organization mission and vision by providing a skill set necessary to provide services and programs	JJMU leaders engage counselors to provide ongoing support, ideas, and services to enhance the mission and vision of JJMU
Local United Way agency	Provides financial support	Funding through grants for programs and services
Community members	Support services and programs through volunteerism and participation in events	JJMU leaders ensure services and programs are aligned with the needs of the community and meet demand
Local businesses	Support services and programs through participation in events and donations	JJMU leaders can raise awareness of services and programs offered and connect with community members
Local institutions	Support services and programs through referrals for student interns	JJMU leaders can engage students interested in careers in counseling

Organizational Situation

The purpose of this qualitative single case study was to explore the strategies nonprofit organization leaders use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. The following subsection reviews information about the competitive environment, strategic context, and performance improvement system leaders of the assigned client organization used to remain competitive. JJMU leaders need to understand the competitive environment in which the organization operates and any current or potential advantages and disadvantages. Organizational leaders have increased opportunities for successful outcomes when understanding the organization's strategic situation.

Competitive Environment

Competitive Position. Within the state where JJMU is located, approximately 30 organizations include the assigned client organization registered as 501(c)(3) organizations that offer mental health services to individuals. From a local competitive viewpoint, a few local regional mental health centers are available to serve clients through a wide range of services. The local, regional mental health centers provide services to clients who need medication management and might require long-term or residential type services. Besides the regional mental health services, there is minimal competition in the area where services are currently provided. However, with the facilities and services currently available to clients, in the past, there have been opportunities for collaboration of services to ensure improved coordination of care for clients following long-term, residential, or hospital stays. In the local and surrounding community area where JJMU operates, it has been challenging for new providers of care offering similar services to open and sustain a new business resulting in minimal growth for the industry. JJMU has a relatively good competitive position in comparison to the current market area. There has been some growth for JJMU during the years 1998-2020, leading to the opening of additional locations for a total of four service locations available to serve the community's needs.

Competitiveness Changes. There is potential for increased engagement with local partners related to changes in funding and insurance coverage. Changes in Medicare and Medicaid have created opportunities for additional service coverage in the local community. These changes have the potential for JJMU to reach an expanded age group to include more adolescents. Because of the growing number of community members living below the poverty level and increasing the potential number of clients in need of mental health services, expanded opportunities for service coverage are significantly valuable. Although leaders of JJMU strive to offer services to individuals in need regardless of financial capacity, there are limited funding resources available, resulting in limited access to care. Changes in leadership with local partners have created opportunities for potentially more collaborative engagement and service expansion.

The leaders at JJMU continue to work closely with local partners to collaborate so that the community's mental health and safety are consistently made a priority. There have been many programs and services implemented in recent years to include expanded services that allowed for innovation to occur. Examples of these programs and services included telemental health services, expanded consulting services, and several new partnerships in the local community to ensure the opportunity to meet potential clients where they are, ultimately expanding the community's reach for counseling services. The leaders of JJMU work continuously to build upon existing relationships and create new relationships in the community to help provide education about available services the organization provides.

Comparative Data. The sources of comparative data and competitive data are somewhat limited for this industry. There are continuous changes in the industry related to the organizational capacity to operate and function successfully, resulting in limited data sources. Potential sources of comparative and competitive data might include credentialing information available through insurance carriers that communicate counselors' availability to provide free or low-cost services in the network. Information about organizations providing similar services are available through GuideStar and local and state informational sites on nonprofit organizations. JJMU leaders create opportunities to review and share available information about similar nonprofit organizations as it becomes available to offer diverse and relevant services to meet the community's needs.

Strategic Context

There are some key advantages and strategic challenges for JJMU (see Table 3) that the ED has identified as areas of opportunity for continued strategic development. The mission and vision of JJMU is the foundation for striving to provide access and excellent service to everyone in need. It is noted that there is a significant number of individuals in the community who need services but unfortunately not able to receive services due to various barriers in place. This number is estimated at approximately two-thirds of all individuals in need of mental health counseling services.

Table 3

Advantages and Strategic Challenges

Advantages	Challenges
- Collaboration with community partners	-Stigma associated with seeking services
-Reputation and affiliation	-Financial barriers limiting access to care
-Dedicated workforce	-Increasing community awareness about services available
-Community support	-Decreased access to funding
-Customer satisfaction	-Recruitment of counselors and volunteers

Performance Improvement System

The ED at JJMU reports the use of two approaches for measuring performance improvement. The first approach is managing billing claims sent to insurance companies and managing incoming funds from other sources. Although various insurance companies are accepted for payment, the focus is generally placed on the more extensive payor sources. Transactions of paid claims are reviewed for comparison against the amount requested from the insurance company versus the actual amount received for payment.

After payments from the insurance company are reviewed, claims are evaluated to determine if there were an opportunity to receive additional funds. Additional funds are possible if modifications to the billing codes are made or other factors limiting the insurance company's amount. In addition, claims are reviewed for opportunities to increase the percentage of the funds received related to any concerns that might result from compliance measures for payors not being met. This information is distributed to leaders at JJMU to facilitate improved billing procedures moving forward. Incoming funds from accounts receivable are reviewed routinely to ensure funds are being received as scheduled at the negotiated rates.

Leaders of JJMU created a customer satisfaction survey and distributed the survey to customers in 2017 with the potential for continued use in the future. Leaders used the survey responses to measure the performance of counselors and services received. This information was valuable to JJMU in capturing data that helped leaders understand ways to improve services and the client experience with the organization.

Leadership Triad: Leadership, Strategy, and Customers

Leadership

Leadership in organizations is critical for achieving successful outcomes and sustainability of operational activities. Achieving exceptional performance and excellent results require influential leaders (Baldrige Performance Excellence Program, 2019). Leaders have the opportunity to serve as role models leading efforts in strategy development and setting and achieving customer-focused goals. Effective leadership skills are important for the facilitation of identifying problems and solution development, communication to stakeholders, and general decision-making related to an organization's day-to-day operations (Baldrige Performance Excellence Program, 2019). Serving in the leadership role for a nonprofit organization involves complexity related to managing the various needs of stakeholders while achieving the organization's overall mission (Gilstrap et al., 2016). Leaders help to set the foundation for adhering to the organization's mission, vision and set values. JJMU organization has several individuals serving in leadership roles outlined in the next section.

Senior Leadership

JJMU has a Board of Directors (BOD), ED, and office manager that serve in leadership roles. The BOD, ED, and office manager all play an important role and support the mission and vision of JJMU. The ED is the senior leader and is responsible for managing the overall day-to-day operations of JJMU. The ED partners with stakeholders to foster community relationships and partnerships through consistent communication and outreach. The ED participates in regularly held meetings with the BOD and routine communication with the staff, volunteers, and counselors supporting JJMU. The ED serves multiple roles in the community, which further foster building sustainable and valued community relationships.

Setting the Vision and Values. JJMU was founded in 1998 with the support of three supporting agencies and the organization's senior leader. At the time, the senior leader had a clear vision for the mission of JJMU. Collaboratively with supporting agencies and stakeholders, the senior leader has been able to fulfill the organization's mission. During the years of operation, JJMU has expanded services to now have the support of nine other agencies for a total of 12 and four locations serving the community. The ED serving in the role of senior leader communicates the organization's vision and value to stakeholders of JJMU through participation in board meetings and routine communication with staff, volunteers, and counselors. Additionally, the ED works directly with community stakeholders and partnering agencies to advocate for and promote awareness of services available to those in need. The ED uses local community events, email, mail, and social media platforms to communicate the community mission and vision of JJMU.

Promoting Legal and Ethical Behavior. The ED and professional counselors have a legal obligation to follow the guidelines outlined by accrediting agencies at JJMU when providing care to the community. JJMU leadership has an obligation as a registered nonprofit organization to make certain information available to the public. The information available to the public includes yearly Internal Revenue Service Form 990 and mission and vision statements. In addition, employees and volunteers are expected to adhere to legal and ethical behavior that includes a code of conduct. Employees and volunteers are not allowed to disclose confidential patient information unless when (a) needed for billing purposes, (b) adhering to a court order, or (c) the patient has signed an authorization to release information.

Communication. The ED at JJMU has meetings with employees, counselors, student interns, and volunteers regularly and as needed. Communication with employees, counselors, student interns, and volunteers also occurs via email and phone when needed. The ED at JJMU meets with employees, professional counselors, student interns, and volunteers to review performance and discuss any short-term and long-term goals and objectives. If there are any organizational decisions or need to discuss organizational change, the ED shares this information with employees and counselors after meeting with the BOD. Social media is used to communicate with and engage stakeholders, key partners, customers, and the general public.

The ED and professional counselors working at JJMU routinely attend community meetings and events. Additionally, the ED and professional counselors serve on local advisory boards and professional organizations in the community. Participating in community meetings, events, advisory boards, and professional organizations are opportunities to raise awareness about the services offered at JJMU. Furthermore, the ED, professional counselors can foster partnerships, strengthen existing relationships, and contribute to the community with professional and personal experiences shared.

Creating an Environment for Success. JJMU was founded to establish a framework that was in alignment with the mission, vision, and by-laws of the organization. The ED facilitates an environment for success at JJMU with intentional actions and a focus on providing quality services to the community. The ED sets high professional standards with qualified counselors and employees working together to support the needs of community members who seek services. The mission of JJMU is to provide services to individuals seeking services regardless of their ability to pay for services. The ED has experienced success at JJMU by working with community members experiencing economic hardships to ensure professional counseling services are available.

Because JJMU is a small organization with limited human and financial resources, the ED seeks to leverage employees, counselors, and volunteers' skill set and knowledge. There are collaborative efforts made to accomplish the organizational goals of JJMU, with everyone at JJMU willing to handle various tasks as needed. There is currently no succession plan in place for JJMU. The BOD has governing rights to evaluate the position of ED and seek a replacement when needed.

Creating a Focus on Action. The BOD and ED at JJMU have developed a framework that includes support from community partners and stakeholders. The ED works with community partners and stakeholders to focus on meeting the organization's mission, vision, and strategic goals. The ED continuously advocates in the community to raise awareness about mental health and encourage active participation in supporting the organization. Since JJMU was founded in 1998, there has been an intentional focus on action by increasing community support and key partnerships. As a result of this intentional focus, JJMU has expanded services to include four locations providing service in three different counties.

Senior leaders at JJMU work diligently to improve organizational performance and create value for all stakeholders. The BOD and ED demonstrate accountability through the implementation of an evaluation and review process. Objectives and goals are communicated with specified stakeholders as needed to foster action to take place. The ED routinely evaluates established objectives and goals and makes adjustments when necessary to balance responsibilities and tasks assigned.

Governance and Societal Responsibilities

Governance System. The organizational governance system for JJMU consists of a BOD with 13 members. Members are appointed to the BOD for a 3-year term. The positions on the BOD consists of the chairperson, secretary, and treasurer. The members of the BOD annually elect these positions. The chairperson leads quarterly board meetings with the meeting minutes and record-keeping managed by the secretary. Financial records to include but not limited to the budget are maintained by the treasurer. In general, board members are selected to be part of the BOD based on interest or personal experiences that are valuable to supporting the mission and vision of JJMU.

The BOD establishes policies and adopts an annual budget for JJMU. Members of the BOD are responsible for maintaining communication between supporting churches and JJMU. Additionally, the BOD provides guidance, support, and evaluation of the ED for JJMU. The BOD oversees the implementation of programs, fundraising efforts, and hiring of new employees or counselors. At the discretion of the chairperson, an executive committee is formed and tasked with making recommendations for actions and policies. The executive committee consists of the chairperson, secretary, treasurer, and four additional board members as outlined in the bylaws of JJMU. Members of the BOD are held accountable for attending scheduled meetings. The bylaws require that members provide an excuse for not attending meetings. If a member of the BOD misses three or more consecutive board meetings, they will be removed from the board.

Performance Evaluation. There is no formal written process currently in place for the BOD and JJMU to evaluate executive compensation. The lack of having this process in place is an area where there is an opportunity for improvement. The compensation for the ED is determined annually during the review of the budget for JJMU. During scheduled board meetings and when needed, the BOD and ED review what is working well for the organization and what opportunities exist for improvement. The ED evaluates employees, counselors, and volunteers annually to foster professional development.

As I considered the behaviors of leaders at JJMU relative to the stakeholder theory, I identified leaders are focused on the organization's stakeholders, and there is alignment with the principles of the stakeholder theory. According to Freeman (1984), leaders need to understand how customers, employees, community members, and stakeholders have interests in the organization. Having effective board processes established can cultivate strategic planning and achievement of successful outcomes (Zhu et al., 2016). With the identification of no formal process to evaluate executive compensation, there is an opportunity for improvement for leaders of JJMU. I recommend drafting a BOD plan to provide financial oversight to include consideration for developing an executive compensation plan. Serving on the BOD is a leadership role with a responsibility to address opportunities for improvement, plan, and execute strategies that will support the organization's success (Lincoln et al., 2019). The BOD for JJMU has an opportunity to implement a strategic approach that could increase access to financial resources resulting in sustainable process improvement for the organization.

Legal and Regulatory Compliance. Counseling services are provided to community members with adherence to the legal and regulatory guidelines outlined by the American Counseling Association. The senior leaders at JJMU adhere to legal and regulatory compliance by sharing required information with the public that includes annual tax filings and completing tax documents. Organizational information is made available for stakeholders, key partners, and customers. The BOD prepares for potential public concerns by encouraging transparency and communication with stakeholders, key partners, and customers when needed.

Ethical Behavior. Ethical behavior is promoted in all interactions at JJMU. The ED reviews expectations for ethical behavior with the professional counselors, employees, and volunteers during the initial agreement to work at JJMU. There is a stigma associated with receiving mental health services, therefore maintaining professional and ethical etiquette is critical for creating and sustaining trust with clients receiving services at JJMU. Private health information is only shared among professional counselors as needed and for billing purposes at JJMU. If there are any instances or concerns regarding ethical behavior, the ED will promptly address all parties involved.

Societal Well-Being. The well-being of the community is a critical component of the mission and vision of JJMU. The community's societal well-being and needs are continuously considered in developing new programming and the review of existing programs and services at JJMU. The mission and vision of JJMU are based on providing spiritual and mental health care to the community. There are collaborative efforts at JJMU to enhance the care and services provided to the community and reduce barriers to care for those in need. The communities served across four counties have a high poverty rate. There are approximately 500,000 individuals in the state where JJMU operates without medical insurance coverage. Offering counseling services to individuals in need regardless of their ability to pay for the services is the mission at JJMU. The operational activities at JJMU have minimal influence on the environmental and economic systems. All activities take place with efficiency and concern for minimizing waste.

Community Support. The key communities served at JJMU include individuals and families in need of counseling services, adults, and adolescents in need of court-ordered counseling, and individuals and families with low-income in the local communities served. The workforce at JJMU collaborates with senior leaders at JJMU to connect professional counselors with clients and schedule appointments. The office manager works with the client to resolve concerns about insurance coverage and payment of services. The ED, BOD, and stakeholders at JJMU work together to recruit volunteers when needed, build relationships with key partners, and secure funding through grant applications.

Strategy

Strategy Development

Leaders use strategy development as part of the planning process for the future. Elements of strategy development include identifying strategic goals and objectives, action plans, and reviewing work processes. Leaders engage in strategy development to understand how to use available resources and sustain operational activities.

Strategy Planning Process. The ED shared that the JJMU organization has a strategic planning process in place. The ED met with the counselors and office manager to discuss the strategic goals for the organization. The organization's strategic goals are addressed regularly at staff meetings by the ED and with the BOD during quarterly meetings as needed. The strategic goals for JJMU are planned in alignment with the mission and vision of the organization. The ED, along with the counselors, office manager, and BOD, discuss opportunities for improvement. The strategic planning process consists of setting short- and long-term goals. One short-term goal was to implement technology to expand services to clients and conduct counseling sessions by January 1, 2020. This goal was met successfully with telemental health services available for use and minimally operational by January 1, 2020. As of the second quarter of 2020, telemental health services are fully operational for the JJMU organization. A long-term goal was set to identify secure locations throughout the state that could be used to offer counseling services to clients. These locations would be strategically located to maximize benefits to the community and allow for a computer and privacy to meet with clients. Achieving this long-term goal would allow JJMU to expand services and minimize barriers to offering services. As of the second quarter in 2020, this long-term goal is still in progress. The ED, counselors, office manager, and BOD all have the opportunity to share their thoughts and ideas during staff meetings, board meetings, or via other forms of communication if and when desired. The ED creates an environment welcoming to all and allows for knowledge sharing and innovative ideas to be shared.

Innovation. The strategy process for incorporating innovation at JJMU includes identifying new opportunities and processes and improving the strategic approach for existing services and processes. The ED discusses opportunities for innovation routinely with the counselors, office manager, and BOD. Examples of innovation implemented include expanding telemental health services for all counselors to use and carry out efforts to increase the recruitment of qualified counselors. In addition to recruiting new counselors, during the second quarter of 2020, efforts were made to expand existing counselors' capacity by pursuing licenses to care for clients in neighboring states. The ED has plans to continue pursuing new ideas with the counselors, office manager, BOD, and other stakeholders.

Strategy Considerations. The ED makes efforts to assess the needs of the community through various platforms and community events. With the data collected, the ED can continually address any need for improvements and discuss ways to expand clients' services based on the needs assessment. The opportunity for continuous improvement does not get overlooked by the ED for JJMU as there continues to be a growing need for counseling services. Through partnerships and relationships with stakeholders, barriers to services are minimized for the community. Efforts are in place to expand the capacity of services manageable by JJMU in the current state, with thoughts of how to expand services in the future.

Work Systems and Core Competencies. The key work processes and core competencies for JJMU include providing mental health counseling services to the community. Services are offered in alignment with the mission and vision of JJMU, which is to provide counseling to individuals who may or may not have the capability of paying for services. Clients without health coverage to cover the cost of counseling services are provided supplemental funding to help with payment for services. This supplemental funding is made possible through grants, fundraisers, and financial support from stakeholders. The number of clients served is tracked monthly by the office manager with oversight provided by the ED. In addition, funding from donors, stakeholders, third party payors, and grants is tracked monthly by the office manager.

Key Strategic Objectives. The ED for JJMU describes the key strategic objectives as achievable goals and in the best interest of serving the local and surrounding communities. One critical strategic objective for JJMU is expanding services by hiring additional counselors to be on staff. With additional counselors, more clients could be served, directly affecting the business operations and outcomes for JJMU. Short-term and long-term goals are incorporated as part of the key strategic objectives for JJMU. The ED, counselors, office manager, and BOD meet regularly to address progress on these goals and identify what processes are working well and what processes might not be working well.

Strategic Objective Considerations. The short- and long-term goals established for JJMU are used as guidance by the ED when identifying strategic objectives to pursue. The ED would like for JJMU to operate successfully while growing and sustaining services as a nonprofit organization. The ED and BOD are aware of human and financial resources' limitations and seek ways to reduce these limitations on a year-to-year basis. In January 2020, eight counselors were employed at JJMU with a desire to hire additional counselors and expand services. With additional financial resources, there would be an opportunity to hire additional employees to serve in the role of support staff. In January 2020, there was one person employed at JJMU as support staff.

Strategy Implementation

The following section describes what action plans were developed, the implementation of the action plans, and a review of resources' allocation to implement the action plans. Leaders monitor the progress of strategy implementations to assess the accomplishment of desired outcomes. The ED at JJMU meets with the workforce and BOD during scheduled meetings to discuss strategy implementation.

Action Plans. The ED for JJMU implements action planning with support and assistance from the counselors, office manager, and BOD. Action plans were discussed during scheduled staff meetings. The approach was to conduct staff meetings once monthly; however, meetings might have occurred more often if needed. The short-term action plan for JJMU was aligned with the implementation of telemental health services. The action plan to implement telemental health services included securing the necessary technology to conduct secure meetings with clients. In addition, before using the technology, counselors needed to receive training on how to safely conduct meetings with clients following state guidelines for the protection of client safety and privacy.

The action plan for the long-term goal of expanding services to the community involved recruiting additional counselors. The action plan for recruiting new counselors involved creating new marketing materials, attending local and state professional events to meet and communicate with new graduates, and partnering with existing stakeholders to share the mission and vision of JJMU.

Action Plan Implementation. Implementing the short-term goal of expanding services to included telemental health services to clients was successfully implemented by the second quarter of 2020. There was an additional cost incurred for eight counselors' support to have access to conduct counseling sessions securely and privately. The additional cost was managed with minimal modifications to the budget for JJMU due to secured funding and grants received in 2020. The implementation of the long-term goal for JJMU is in progress as of the second quarter of 2020. Goals are reviewed quarterly at JJMU to assess progress and opportunities for improvement during staff and board meetings.

Resource Allocation. The ED makes efforts to align available resources with short- and long-term goals. Limited access to resources limits the ability to implement new goals and make improvements. Resources available at JJMU come from three funding sources to include fee revenue, grants, and fundraising. The primary revenue source is derived from fee revenue for services, including payment from third-party payors and payments received directly from clients. There are minimal overhead costs for operating JJMU locations. All locations operate on property owned by participating churches and require no rental payment for building use.

Workforce Plans. The ED at JJMU has put in place workforce plans to implement short- and long-term goals. The workforce plans include discussing progress on identified goals and taking necessary steps to accomplish these goals. The office manager reviews the progress of the goals and shares them with the ED. The ED communicates updates on the progress of the workforce plans with the counselors and BOD.

Performance Measures. The office manager at JJMU tracks the progress of the implemented goals for the organization. Performance measures tracked include the number of visits taking place monthly for all locations and per counselor. The office manager tracks the electronic medical records system's usage and the number of telemental health visits that take place monthly. This data is shared with the ED and analyzed to determine progress compared to previous months and years since the organization was opened in 1998. In addition, a customer survey was given to clients in 2017 with plans to conduct another survey in the future. The ED has used results from the survey to measure and track customer satisfaction at JJMU.

Performance Projections. There is minimal data to support the performance projections for JJMU as of the second quarter of 2020. In comparison to the second quarter of 2019, JJMU is sustaining operational services at a satisfactory rate. Regarding the expansion of services to increase community outreach and access to financial resources, the projections are optimistic; however, the projections are based on the recruitment of additional counselors. The ED has plans to continue strategic planning and implementation to recruit counselors and expand services to the community.

Action Plan Modification. JJMU organization is a small nonprofit organization that is beneficial when there is a need to execute action plans quickly. The small size of JJMU allows for impromptu meetings when needed to discuss important or time-sensitive concerns. The need to execute immediate plans is not a concern for the ED of JJMU because, with technology, the counselors, office manager, or BOD can meet virtually when needed. The ED communicates strategic plans, action items, and outcomes of short- and long-term goals with the counselors, office manager, and BOD during scheduled meetings to create an inclusive environment of stakeholder involvement. During the second and third quarters of 2020, leaders of JJMU were required to make quick decisions related to the limitations of the global pandemic COVID-19. During the global pandemic, meetings and services in person were no longer able to ensure adequate safety measures and adherence to local and state health guidelines were being met. The ability to make adjustments to meet the needs of stakeholders was demonstrated by leaders at JJMU in their response to the global pandemic.

Customers

Customer Expectations

Leaders should learn about customer expectations. It is beneficial for leaders of an organization to listen to their customers and evaluate the customers' needs. The ED at JJMU assesses customer needs through active participation in community events, partnerships with stakeholders, and customer feedback. The ED has a goal of meeting or exceeding customer expectations through providing exceptional, quality care to customers.

Current and Potential Customers. Current and potential customers of JJMU include individuals and families seeking mental health counseling services. The needs of the community vary across the counties served. JJMU has professional counselors with different skillsets to ensure that clients can be paired with a counselor experienced in the area important to the client. Details about client needs are gained by completing a client intake form or completing the referral process at JJMU.

Professional counselors who engage in direct communication with clients can solicit clients' feedback through verbal and nonverbal communication and cues. Professional counselors use this information to create an environment and dialogue with the safe client and support open and active communication to facilitate counseling. Communication and follow-up with clients occur across the life cycle with the client and is adjusted to meet the client's comfort level. Relationship building is critical to the success of clients receiving professional counseling services.

The leaders at JJMU use social media as an approach to improve stakeholder engagement. Facebook is used as a platform to engage current and potential stakeholders. The ED, office manager and professional counselors communicate using social media to raise awareness about upcoming programs and events and share uplifting information. Integrating the use of a social media platform helps to reinforce the brand of JJMU and promotes the organization's mission. In general, social media use reaches customers, both current and potential, and potential key stakeholders and partners in the community. Public data collected from the Facebook page reveals JJMU has over 601 followers.

Leaders can use this data to learn about the customer expectations and integrate changes in how the strategic approach in using social media is working to benefit JJMU and increase stakeholder engagement. I recommend the leaders of JJMU continue to implement the approach of using social media to reach stakeholders. There is an opportunity to explore additional ways to increase the social media presence of JJMU through connecting with community partners. Asking community partners to share content regarding upcoming events, programming, and fundraising opportunities can increase the social media presence of JJMU. Deploying this approach can foster stakeholder engagement, strengthen relationships with partners and increase awareness of the community's services. From the stakeholder theory perspective, offering services to meet customers' needs is an essential element toward value creation (Freudenreich et al., 2020). Leaders at JJMU use social media platforms to communicate the value of services available to meet customers' needs.

Customer Segmentation and Product Offerings. The ED, professional counselors, and office manager engage in community activities to raise awareness for the services provided at JJMU. In addition, efforts are made to form partnerships through the court system, local employers, and other community partners. With these partnerships, the ED can establish new market segments for providing services to the community. Partnerships with the local state and community hospital organizations are also developed to reach potential customers residing in one of the four counties serviced. The BOD promotes services available at JJMU through communication with the supporting church organization and its members. Members of the supporting churches are encouraged to seek counseling services at JJMU as needed.

Product offerings are determined through referrals from partners and the voice of the customers. If there is a need for a particular focus in counseling or programming based on the community needs assessment, then the BOD and ED have discussions to determine if there is the capacity to meet the need. Following discussion, if it is determined there is no capacity to meet the need at that time, then there will be efforts made to obtain additional funding or resources. Through a collaborative effort, the BOD, ED, and office manager will research the availability of grants, donations, and government funding to meet the capacity to implement additional funding. One example of the approach to offer new products and services is demonstrated by learning the ED's need to provide flexible options for counseling services. As a result, telemental health services were made available for clients who could not have a face-to-face visit with the counselor. Telemental health services were deployed at the beginning of the year 2020, proving to be a valuable integration of services when counselors could not meet customers face-to-face as a result of COVID-19 restrictions.

Customer Engagement

The workforce at JJMU actively participates in community events to increase awareness of the organization's services. The workforce engages customers through ongoing communication using social media platforms, electronic newsletters, and visibility in the community. Customer engagement is demonstrated through continued participation in counseling services.

Relationship Management. The ED at JJMU builds relationships with customers through community outreach. The ED, counselors, office manager, and BOD are committed to raising awareness about JJMU through participation in community events, professional events, serving on community boards, church announcements, and social media platforms. In addition, through partnerships with the local United Way Agency and hospitals in the community, the ED can strengthen existing relationships in the community. Raising awareness about counseling available services and minimizing barriers to accessing the counseling services are at the forefront for the ED at JJMU.

Customer Access and Support. Customer support and access are aligned with the mission and vision of JJMU. The ED at JJMU ensures customers are provided support through offering counseling services regardless of their ability to pay for the services. If a customer is seeking counseling, the office manager will work with the customer to review all payment options to ensure the customer has access to counseling services. Customer access and support are critical to the success of JJMU. As the ED noticed a need for expansion of services in the community, three additional locations have been opened since 1998. With the expansion of services, there has been a significant increase in customer access and support.

Complaint Management. There are two levels of complaints managed by the ED at JJMU. The first level of the complaint involves an internal communication to the ED of JJMU. If there is a complaint at this level, the ED will schedule a meeting offering the individual making the complaint an opportunity to discuss the concern. Following this meeting, the ED will schedule a meeting with the counselor involved and discuss a resolution. If necessary, reassignment of the client will take place. In addition, if there is a need to follow-up with the counselor from a supervisory perspective, the ED will manage this process. The second level of complaints are complaints made to the licensing board in the state where JJMU operates. If there are complaints at this level, additional stakeholders must include an attorney, licensing board, and counselor for whom the complaint is made. An investigation is launched, and the outcomes or resolutions are dependent on the findings. As of the second quarter in 2020, there has only been one complaint at this second level. After an investigation was conducted, the case was closed with no further action or resolution required.

Satisfaction, Dissatisfaction, and Engagement. The ED at JJMU has asked clients to complete a brief survey following their counseling session. The survey was conducted in 2017, with plans to administer another survey to clients in the near future. Results from the survey were reviewed for opportunities to make improvements at JJMU. The information captured from the survey was used to identify any correlation between a client's mental state and other satisfaction factors such as payment method, number of sessions, or counselor. The survey results provided the ED with information that could be used to create action plans for improvements. The survey conducted in 2017 indicated customers were satisfied without the need to implement an action plan at the time.

Satisfaction Relative to Other Organizations. There are a limited number of mental health counseling organizations located in the area where JJMU operates. As a result, the ED has not measured or considered customer satisfaction relative to other organizations. To determine if customers are satisfied, the ED has asked clients to complete an anonymous survey. The results of the survey have been reviewed by the ED and shared with the counselors, office manager, and BOD. Application of the stakeholder theory could result in leaders implementing strategies that lead to changes in the business model (Freeman, 1984). Having an understanding of stakeholder needs is beneficial to organizational leaders when they are considering how well the organization is meeting goals from the perspective of the customer.

Not considering or measuring customer satisfaction as it relates to other organizations is an opportunity for improvement. According to Gonzalez (2019), identifying customer needs and expectations can improve an organization's competitive advantage and opportunity to improve customer satisfaction. Considering customer satisfaction relative to similar organizations outside of the service area of JJMU could provide beneficial results. There is an opportunity for the ED to learn from other organizations offering similar services and use the information gained to identify opportunities for short-term and long-term initiatives. These short-term and long-term initiatives could include opportunities for the BOD and ED to create new standards and improved performance expectations for JJMU workforce members to follow.

Use of Voice-of-the-Customer and Market Data. The stigma surrounding mental health is prevalent in society. The ED at JJMU supports the idea of addressing the voice-of-the-customer to create new avenues for offering services with sensitivity to the clients' needs. The ED uses the voice-of-the-customer to create a culture where the client can understand that counseling support is available and accessible. The ED understands that without the customer, JJMU would not be able to operate successfully. Therefore, creating a culture and environment that is welcoming and nonjudgmental is critical to the success of JJMU and the sustainability and growth of the organization.

Results Triad: Workforce, Operations, and Results

In the following subsections, the Baldrige Excellence Framework will be used to analyze how leaders evaluate organizational processes. The Baldrige Excellence Framework defines processes as the methods leaders use to improve (Baldrige Performance Excellence Program, 2019). The processes leaders use are evaluated using the following four factors in the Baldrige Excellence Framework (1) approach, (2) deployment, (3) learning, and (4) integration (Baldrige Performance Excellence Program, 2019). In evaluating processes using the four factors, the Baldrige Excellence Framework is used to provide feedback for leaders that identify strengths and opportunities (Baldrige Performance Excellence Program, 2019). In the following subsections, I will provide data used to assess the workforce, operations, and knowledge management of the JJMU organization.

Workforce

Workforce Environment

Capability and Capacity Needs. The ED takes an approach to reviewing all workforce members' qualifications and certifications during the recruitment and hiring process. In addition to any state-required certifications that enable the counselors to provide care to clients, the ED also considers the soft skills as additional skillsets of potential workforce members. Workforce members must be comfortable interacting with others and understand the mental health industry. All workforce members must understand the mission and vision of JJMU and commit to upholding the mission and vision in their actions associated with the organization. For the counselors working at

JJMU, additional levels of responsibility include maintaining professional behavior and ethical practices in and outside of work activities. The ED reviews workforce employees' qualifications as part of the approach in determining if candidates have a general understanding of how to use an electronic medical record system (EMR). The ED also reviews potential counselors' qualifications to determine if they can obtain licensure and credentials to perform telemental health sessions if required. The approach outlined above describes the ED's processes to ensure integration is accomplished in meeting the overall mission and vision of JJMU.

New Workforce Members. The ED acknowledges that the customer base for JJMU is very diverse. However, the current workforce as of the second quarter of 2020 is not very diverse. In the topic of diversity-related to sexuality, the ED of JJMU shared that there have been more considerable gains in this area related to the workforce. There are workforce members who specialize in providing care related to sexuality. Therefore, this has been beneficial for the organization and has resulted in new customers. In the past, the ED has taken an approach that created opportunities for students from the local university to participate in internships. During deployment of the student internship program, there have been workforce members representing diverse ideas and cultures. Unfortunately, retaining counselors following the completion of student internships has been challenging in the past.

When recruiting for new workforce members, the ED has learned that one of the challenges includes the limitations surrounding salary or pay range for counselors. JJMU organization is a small nonprofit organization located in a rural area. These factors contribute to the limited number of qualified applicants seeking employment at JJMU. The ED of JJMU has learned that the organization's location and the limited number of qualified applicants is an opportunity for improvement. A recommendation for increasing the number of qualified applicants includes researching additional platforms for seeking candidates. These platforms could include an approach that involves advertising in nearby states, on local radio stations that have a national audience base, and using social media platforms as a way to reach potential candidates. Another recommendation includes asking partners and stakeholders to share job postings to increase the number of potential candidates. In addition, taking an approach that provides increased flexibility related to work schedules could increase qualified candidates' potential to apply for a position. A strategic approach to reach potential candidates could involve using persuasive language and appeals to a candidate’s willingness and desire to contribute to society and their community (Saric Fashant & Evan, 2020). Deployment of this strategic approach could increase the number of applications received.

The ED takes an approach to onboard new workforce members by reviewing best practices and processes at JJMU. When possible, the onboarding of a new workforce member is deployed through partnering with an existing workforce member performing similar if not the same work. The approach to partner workforce members allows the new workforce member to observe, ask questions, and receive support during the learning and acclimation to JJMU. Through this process's deployment, the ED has learned that new workforce members are best prepared to understand the organizational approach to providing excellent customer care.

The approach for the recruitment of new workforce members takes place through multiple platforms. The deployment for recruitment at JJMU uses multiple platforms that include advertising utilizing local newspapers, connecting with local universities for potential new graduates, and attending community or professional job fairs. After deployment of recruiting methods, the ED has received approximately eight applications to hire candidates for counseling positions. Integration of new recruitment approaches has resulted in four counselors being extended employment offers and accepting positions as counselors. As of the fourth quarter, there are a total of 12 counselors providing mental health counseling services at JJMU.

Workforce Change Management. The ED takes an approach to prepare for change at the JJMU organization by integrating continued communication with the workforce and BOD. The ED has learned of the need to implement change when needed to meet the needs of the community and the individual needs of the clients served. Deployment of implementing change as needed allows the ED to ensure integration to ensure the organization is equipped with the tools and resources needed to fulfill the mission and vision of JJMU. There are limited resources available for the ED to use when implementing change. However, with strategic planning, grants, and donations, the ED has been able to integrate innovative work processes that have proven beneficial in meeting the community's needs. The ED takes an approach that considers the financial cost and any additional required resources necessary to implement the deployment of changes at JJMU. The ED also considers the effect change efforts might have on the workforce from a short-term and long-term perspective. The ED learns using feedback received via the workforce through discussion that takes place during scheduled staff meetings. When needed, the ED takes an approach to meet with members of the workforce on an individual basis to discuss performance, accountability, goal setting, and support to prevent or minimize workforce reductions. The ED prepares for and manages workforce growth through actively recruiting for new workforce members. The ED and BOD work together to ensure there are resources available to support new workforce members' recruitment.

Work Accomplishment. The ED approach is to provide support and guidance for workforce members in several ways. Deployment of this approach provides support and guidance given in the form of performance reviews, goal settings, and creating a supportive environment centered on continued personal and professional growth. The ED incorporates references to biblical passages as a motivation for completing the work at JJMU. The ED integrates these biblical references to remind the workforce at JJMU of the organization's mission and vision. Workforce members are reminded of the importance and significance of meeting clients where they are in terms of providing counseling services.

Workforce Environment. The ED approach to ensure workplace health, security, and accessibility for the workforce are deployed through routinely reviewing the environmental factors at each location where counseling services are provided to clients. The ED takes action to minimize or eliminate barriers that would limit persons with disabilities from working to their potential at JJMU. The workplace at JJMU is inclusive and accessible for all workforce members as of the second quarter of 2020. The workforce at JJMU takes responsibility to communicate any individual environmental needs necessary to provide counseling services. The ED approach to support the workforce is deployed through direct communication regarding health or security concerns in the workplace environment. The deployment of implemented strategies ensures the workforce has access to an environment that is safe and secure while providing counseling services to the community. The workforce is aware of what approach to take if there is a concern for safety or security during a counseling session.

Workforce Benefits and Policies. The ED supports the workforce through an approach to promote a culture of lifelong learning in the workplace. The ED facilitates opportunities for continuous improvement and ongoing development from a personal and professional standpoint. One example of how the ED deploys this approach is the flexibility workforce members have in setting their schedules. Integration of flexibility allows members of the workforce opportunities for autonomy and educational development. The ED takes an approach to reviewing existing policies and procedures at least once annually to learn if there is a need to make changes to ensure members of the workforce have access to a workforce climate that is conducive to fulfilling the mission and vision of JJMU.

Workforce Engagement

Drivers of Engagement. The workforce at JJMU is driven to work toward fulfilling the mission and vision of JJMU through their dedication and commitment to the community they serve. The mission of JJMU is to provide mental and behavioral health services to individuals and families regardless of the ability to pay for the services. The workforce is motivated and engaged in fulfilling this work from the passion each member of the workforce has for providing excellent care and counseling to the community. The ED has an approach that includes offering words of encouragement and support through communicating with the workforce about the mission of JJMU. In addition, during communication with the workforce, the ED references biblical passages that reflect on why the services offered at JJMU are important and appreciated integrating the mission and vision routinely via communication efforts.

Assessment of Engagement. There is no current survey administered to the workforce at JJMU. There is concern from the ED that administering a survey would not provide a platform for members of the workforce at JJMU to remain anonymous if desired due to the organization's size. The ED deploys an informal approach to measure the level of workforce engagement and satisfaction at JJMU. The ED is intentional about communicating with the workforce on an individual and group basis. During this communication, the ED can directly ask about what is working well and what opportunities for improvement exist related to the work being completed at JJMU. There are no significant differences between the methods and measures used to determine workforce engagement and satisfaction among the workforce's different members. The ED takes an approach to communicate regularly with the office manager due to the level of responsibilities the office manager handles across the different locations. Through the deployment of consistent and open communication with the workforce members, the ED can informally learn if there are indicators of decreased engagement and satisfaction in the workplace.

Organizational Culture. The organizational culture at JJMU is reflective of the mission and vision of the organization. Overall, the organizational culture is one that represents compassion and kindness. To provide the services offered at JJMU, the workforce must demonstrate a level of high performance, engagement, and commitment. The ED integrates an approach to foster and encourage an organizational culture with open communication and peer support. The workforce routinely provides professional support as needed if there are questions or knowledge sharing taking place. Members of the workforce are empowered to share ideas and creativity during scheduled staff meetings and outside scheduled staff meetings. The ED believes in taking an approach that creates a culture where all workforce members can communicate their thoughts openly and honestly with an expectation of timely feedback.

Performance Management. JJMU is a small nonprofit organization with limited resource availability. The ED does not have the resources to provide the workforce with rewards, recognition, or incentives. The workforce members that provide counseling services are compensated based on the services billed following client sessions. There is no additional compensation offered to the counselors. The office manager receives compensation that has been negotiated with the ED and BOD. There is no additional compensation offered to the office manager. The ED approach recognizes the accomplishments and efforts of the workforce members through verbal communication and acknowledgment.

Performance Development. The ED implements an approach that supports the performance development of all members of the workforce at JJMU. This approach is deployed by providing verbal support and encouragement as needed. The ED provides professional updates and reminders on ethical best practices for providing counseling services during formal and informal communication. The ED also offers members of the workforce flexibility in their work schedules to ensure there is an opportunity to pursue personal and professional goals. During the years of 2016-2020, there have been four or more members of the workforce at JJMU who have pursued educational goals and have completed or are currently working toward completing a higher degree.

Learning and Development Effectiveness. The ED does not have a formal process to evaluate the effectiveness and efficiency of the learning and development system. The ED correlates learning and development outcomes through communication with the workforce. The workforce is given opportunities to discuss outcomes of implemented processes following counseling services with clients. If there are opportunities for improvement identified during the discussion, the ED works with the workforce to determine a plan of action. There is an opportunity to learn from this approach and implement a formal process to evaluate the learning and development system's effectiveness and efficiency. The recommendation is to implement a formal process to survey workforce members at the JJMU organization. The survey can take place quarterly to help the ED learn about the effectiveness of the learning and development efforts. Using a formal process to learn about the effectiveness of learning outcomes, the ED could identify trends and use the information to approach long-term strategic planning.

Career Development. There is no formal succession plan in place at the JJMU organization. Because JJMU is a small organization, the ED approach is to work with the workforce members providing counseling services to allow opportunities for continuous education and professional growth. The ED integrates an approach that fosters an environment at JJMU that includes support for members of the workforce through the implementation of strategic planning to achieve the organization's mission. The ED approach is to cultivate an environment for the workforce members to feel encouraged to seek new skills and set professional and personal short-term and long-term goals. If members of the workforce are interested in pursuing additional skills and areas of expertise, the ED approach provides support and assists with feedback as needed.

Operations

Work Processes

Product and Process Design. An assessment of the community needs influences the determination of key product and work process requirements. Additionally, the state regulatory requirements are influenced by the capacity in which the key product and work processes are managed. The ED, BOD, and workforce take an approach to determine the community needs and set expectations for meeting those needs. There is no formal process that exists for assessing the needs of the community. However, through the deployment of community interactions, stakeholder engagement, and referrals, the ED, BOD, and workforce have been able to identify the need for specific programming and services that have been beneficial to the community. One example of this has been learning of an increased need to provide support and counseling for the lesbian, gay, bisexual, and transgender community. The ED and workforce took an approach that recognized a need to increase support for lesbian, gay, bisexual, and transgender individuals seeking counseling. The office manager initiated the process to apply for funding to increase resources that could be used to increase services and programming in the community. In the first quarter of 2020, JJMU was awarded a grant that will support the implementation of additional programming and services to support the needs of lesbian, gay, bisexual, and transgender residents in the community.

Process Management and Improvement. Collaboratively, the workforce ensures that the work processes integrated at each location of JJMU allow members to meet the day-to-day operational needs of the organization. The work processes vary slightly from location to location, but overall, they consist of general work processes expected to occur. These work processes include offering high-level service to clients seeking counseling and completing visit documentation and billing requirements. The ED approach uses reports from the EMR system to manage the compliance with completion of visit documentation and billing. The ED reviews the reports from the EMR system and fee reimbursements to identify if there are trends. If there are trends that suggest opportunities for improvement, the ED strategic approach is to communicate with the members of the workforce collectively or an individual basis supported by the action plan.

Members of the workforce are driven to fulfill the mission and vision of JJMU organization, therefore minimizing opportunities for variations in work processes. Providing counseling services requires compliance with state regulations and guidelines. The ED supports an environment that fosters a team approach with peer and leader support available as needed. The ED integrates leader support with transparency, accountability, and consideration for others.

Supply-Network Management. The ED approach is to select suppliers that can offer products and services that follow privacy and safety regulations for clients and counseling staff. The ED reviewed suppliers with limited resources that could offer the product necessary to complete visit documentation following counseling services. In the fourth quarter of 2019, the ED reviewed suppliers who could provide a secure platform for conducting telemental health services. The ED selected an affordable supplier with the resources available and a product that offered a secure platform for patient privacy. The approach is that all suppliers and products are reviewed to ensure the supplier and products are cost-efficient, effective, and the best option for implementation at JJMU. There is no formal process to communicate the EMR system's performance expectations and telemental health platforms in use at JJMU. However, if there are questions, feedback, or concerns with the use of these products, contact is made with the supplier for resolution. There is an opportunity for the ED to integrate a formal process to survey members of the workforce at JJMU regarding the expectations and use of the EMR and telemental health platforms. This information could be used to learn about trends and provide feedback to the platforms' vendor for continuous improvement efforts or further customization of the product platform for JJMU to achieve desired outcomes.

Innovation Management. The ED pursues opportunities for innovation through reviewing the outcomes of the community needs assessment. For example, in the first quarter of 2020, the ED approach was to implement telemental health services. Implementing telemental health services was a strategic approach that allowed the counselors to reach more clients minimizing barriers to access counseling services. This decision was significant as the ED and BOD decided to cease having face-to face counseling sessions during state mandated stay at home orders due to the COVID-19 global pandemic. The ED approach is to pursue strategic opportunities through researching and applying for grants and donations. If it is determined that a product or service is no longer practical, or beneficial for the community, the ED, BOD, and workforce members discuss the benefits and risks and then decides whether or not to continue pursuing the opportunity.

Operational Effectiveness

Process Efficiency and Effectiveness. The ED controls process efficiency and effectiveness through the approach to communicate with the workforce. The ED prevents rework, service errors, or defects through the deployment of defined process development. There are minimal opportunities for rework, service errors, or defects at JJMU organization. The workforce communicates on a routine basis with clients and the ED to ensure a clearly defined process for scheduling appointments, submitting billing documents, and completing visit documentation. If the ED identifies opportunities for improvement related to rework, service errors, or defects, an evaluation of the process occurs, and adjustments are made. If there is a defect or service error that requires service recovery, the ED approach meets with the client to resolve the issue or concern.

Security and Cybersecurity. The ED ensures the security and cybersecurity of sensitive data and information by integrating using secure electronic platforms. The ED has deployed an EMR for visit documentation and billing and a secure video platform that is used for telemental health services. These platforms are monitored by the supplier for security and cybersecurity threats. The workforce members are encouraged to secure their login information and secure computer access when not using the EMR or video platforms.

Safety and Emergency Preparedness. The ED promotes a safe operating environment for the workforce by ensuring each location is inspected on a scheduled basis. A partnering church owns each location of JJMU, and therefore routine maintenance and inspection is a shared responsibility. There are procedures and plans in place if there is a need to vacate the premises due to inclement weather or safety concerns. To ensure operations of the organization continue in the event the environment is unsafe for the workforce, the ED took an approach to implement a plan with the assistance of the office manager. Through the use of technology, EMR system, and cloud-based storage systems, the day-to-day operations can be fulfilled using a temporary location when needed to ensure there are minimal disruptions in providing services to the community.

Measurement, Analysis, and Knowledge Management

Measurement, Analysis, and Improvement of Organizational Performance

Performance Measures. The ED for JJMU incorporates the use of data and information into the review of performance measures. The office manager collects data on the number of client counseling sessions, the revenue fees collected, grants and fundraising resources received. The ED uses this data to understand the overall performance of the organization and review organizational outcomes. The data is used to support organizational decision making and support innovative ideas and programming. Following the data analysis, the information is shared with the workforce and stakeholders of JJMU. This information is shared through communication with the workforce and stakeholders during scheduled meetings or via email communication. The performance measures are used to help identify areas where progress is being made and areas where there are opportunities for improvement.

Comparative Data. The ED at JJMU focuses on achieving the organization's mission and vision by providing counseling services to those in need. The ED uses comparative data to support decision making. The ED uses the data from the current operating year and previous years to support fact-based decision making. Decision-making is a process in which the ED often involves the workforce to voice their opinions and share ideas. Engaging the workforce in the decision-making process is an important element of the process and allow the ED to consider feedback and hear innovative ideas.

Measurement Agility. JJMU is a small organization with a workforce of 10 staff as of the second quarter of 2020. Given the size of JJMU, there are a few limitations to conducting planning sessions in response to unexpected organizational or external changes. The office manager reviews performance measures monthly, and the information is shared with the ED. Reviewing the performance measures monthly allows for quick action to occur if there is a significant change in performance. When there is a need to review strategies and organizational performance the ED schedules a meeting with the workforce so an action plan can be put into place. An example of how this occurs was demonstrated through a rapid response plan to meet customer needs during the COVID-19 pandemic. With state and local restrictions on meeting face-to-face, the ED and workforce members met via a virtual format to plan and take action so that counseling services could take place using a secure virtual format. A communication plan was created so existing, and new customers were aware of their options, and there were minimal if any delays in care.

Performance Analysis and Review. The ED reviews the year-to-year progress of JJMU for analysis of organizational performance. The financial documents and reporting methods are reviewed annually by an independent bookkeeper and an independent accountant to ensure accuracy and uncover any discrepancies. The analysis of performance is an opportunity for the ED to work closely with the workforce and BOD to develop strategic short- and long-term goals for the organization. In addition to yearly performance reviews, the ED reviews performance data collected monthly. If there are significant findings, a further analysis takes place to explain changes in the performance.

Future Performance. The ED is optimistic about the future of the organization. The deployment and integration of services using telemental health services have opened the door for improved accessibility and organization growth. The ED considered the increasing mental health needs of customers related to the stress of the COVID-19 global pandemic and the effect on the local community. To manage the increasing needs of customers, the ED approach was to research the opportunity to reach more customers in neighboring states. As a result of this approach, the counselors at JJMU are seeking additional licensing coverage to explore providing services to clients in neighboring states. The ED of JJMU understands that there are opportunities to continue to expand access to clients through the use of telemental health services and plans to continue to expand these services.

Continuous Improvement and Innovation. Findings from the performance review and analysis are used to identify areas of opportunity for improvement. The ED uses the findings from performance reviews to develop innovative ideas and efforts to maintain continuous improvement of existing processes. The ED approach is to learn from the findings of the performance reviews and analysis. The findings are shared with the workforce during monthly scheduled meetings. In addition, the findings from the performance reviews are shared quarterly during scheduled meetings with the BOD.

Information and Knowledge Management

Data and Information Quality and Availability. The organizational data and information are managed using electronic systems. The accuracy of the data and information is managed by incorporating a professional accounting firm for management and reviewing accounts receivable. In addition, the organizational data is audited yearly to review accounts receivable. This information is relevant and integrated for a systems check to review the system and the accuracy and quality of the data received. The availability of data is easily accessible for those who are cleared to access data such as financial reports or client data.

Knowledge Management. Knowledge is defined as resources the organization has as it relates to the (a) policies and procedures in place, (b) organizational documents, or (c)software used at the organization (Baldrige Performance Excellence Program, 2019). This knowledge can be shared with the workforce members as well as external stakeholders. The ED takes an approach to transfer knowledge to the workforce via staff meetings that take place. For external stakeholders such as community partners and customers, knowledge is shared through consent forms, acknowledgment of services, and execution of services. In addition, the ED deploys knowledge using an approach to share a monthly newsletter with stakeholders via email. In addition, knowledge about the organization, such as documents or policies and procedures, is shared through the website and social media platforms.

Best Practices and Organizational Learning. The workforce shares best practices through communication in monthly meetings. Formal feedback is provided to the workforce during the monthly meetings that take place. Collaboration and knowledge sharing occur during the staff meetings to ensure the workforce provides services at the highest level possible. Informally, organizational learning takes place through face-to-face interactions. Through providing counseling services, consulting with each other, and sharing of knowledge takes place through ongoing and constant communication. When applicable, outside consultants are invited to share information and provide organizational learning opportunities to the workforce during scheduled staff meetings.

Collection, Analysis, and Preparation of Results

Thematic Findings

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. The research question for this study was: What strategies did leaders of a small nonprofit organization use to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission? The data collected for this study consisted of conducting semistructured interviews, reviewing archival records, and obtaining public data available through the Internet. The thematic findings were based on interview findings and a review of the organization's data collection and analysis. Thematic analysis of the data identified the following themes: (a) effective fundraising strategies, (b) community involvement, (c) board effectiveness, (d) strategic planning, and (e) effective recruitment strategies.

Thematic Finding 1: Effective Fundraising

Effective fundraising strategies are essential for nonprofit organization leaders. There is potential for nonprofit organizations' leaders to receive funding when donors can make donations to a specific cause or need (Nageswarakurukkal et al., 2020). Taking an approach that demonstrates to stakeholders the importance of the organizational mission and the potential positive effect their donations will have on achieving that mission can be crucial to nonprofit organizations' leaders. Leaders of the JJMU organization have implemented strategies that have increased fundraising donations.

However, this study's data suggests an opportunity for improvement in the strategic approach leaders of JJMU implements for fundraising. Participant 2 emphasized a need to explore additional fundraising opportunities, noting there needs to be increased planning and an increase in fundraising activities throughout the year. Applying the stakeholder theory raises awareness of the concept that organizational leaders rely on the stakeholder perspective of the organization related to a willingness to support fundraising efforts. Nonprofit organization leaders should plan for a strategic approach that attracts new donors and engages existing donors to repeat donations over time (Alborough, 2017). A focus on increasing stakeholder engagement could result in increased fundraising funds for leaders of JJMU to advance the organization's mission.

Thematic Finding 2: Community Involvement

Having an active presence in the community can have positive outcomes for nonprofit organization leaders. Engaging in community events can result in referrals for new customers. Additionally, nonprofit organization leaders can communicate and interact with community members, leading to the organization's increased trust. For the JJMU organization, participating in community events could increase trust for new customers and reduce stigmas present in the community seeking mental health counseling services. Participant 3 communicated that being involved in the community has led to successfully raising awareness of its organization and services. Participant 3 also shared that many workforce members of the JJMU organization serve on executive boards in the community. This engagement level allows workforce members to learn about community concerns that might be present and advocate for community members' needs.

Application of the stakeholder theory places emphasis on the importance of stakeholder engagement. Leaders who can identify who their stakeholders are and find innovative ways to reach these stakeholders have an opportunity to foster positive outcomes. With this opportunity, leaders can improve opportunities for organizational success. Increased engagement in the community results in increased stakeholder engagement and is likely to positively influence organizational leaders' long-term strategic goals.

Thematic Finding 3: Board Effectiveness

The board of directors for a nonprofit organization is often tasked with providing leadership and oversight of operational activities. Connecting why an individual chooses to serve on the board for a nonprofit organization can improve board member engagement and retainment (Miller-Stevens & Ward, 2019). The BOD for JJMU organizations consists of representation from each participating church that provides support for the organization. The BOD typically holds meetings face-to-face; however, since COVID-19 restrictions have been put in place, meetings have taken place using a virtual format.

Participants 1, 2, and 3 agree that the BOD is responsible for providing oversight for the organizational, operational activities. Participants 2 and 3 communicated that members of the BOD are not fully engaged in the activities at JJMU. It is recommended that the BOD members have a passion for serving and actively participating in providing feedback and support to meet the organization's mission. This passion can help increase strategic planning efforts and collaboration to enhance the organizational outcomes for JJMU.

Leaders can use the stakeholder theory to understand that BOD members are valuable stakeholders in an organization and can contribute in meaningful ways to help move a nonprofit organization's mission forward. When leaders apply the stakeholder theory, they raise awareness of the BOD's critical role in an organization. The size and previous experiences of board members can enhance the board results' effectiveness, leading to better organization success (Garcia-Torea et al., 2016). Understanding the value-added ideas and support members of the BOD offer will help nonprofit organization leaders leverage the skills and experiences members provide.

Thematic Finding 4: Strategic Planning

Nonprofit organization leaders can take a proactive approach to plan for the organization's future when strategic planning occurs. Strategic plans should include goals that can be achieved in a short period of time and goals that would be achieved in a longer period of time. Strategic planning benefits include being better prepared to identify problems, mitigate risks, and use available resources. Participant 2 communicated that there were opportunities to improve strategic planning efforts during the data collection process to make decisions in a reasonable amount of time and changes implemented accordingly.

How well an organization operates can be affected by how well leaders of an organization have implemented a strategic plan. Strategic planning efforts can influence the financial efficiency of an organization (Valeau et al., 2019). The ED at JJMU communicated that strategic planning is taking place and measuring the progress being made is also taking place. Based on the data collected, I believe there are opportunities to enhance the strategic planning process to develop short- and long-term attainable goals. With a formalized process in place, leaders of JJMU can continue to evaluate the effectiveness of the strategic plan and make adjustments as needed to advance the organization's mission forward.

The stakeholder theory can apply to the theme of strategic planning in that nonprofit organization leaders need to consistently engage in strategic planning efforts to continue identifying ways to move the organization’s mission forward. The development and implementation of strategies puts stakeholders’ interest at the forefront of the decision making. Effective strategic planning should be a necessary element of operating an organization. Without time set aside to focus on strategy development, leaders put the future success of the organization at risk.

Thematic Finding 5: Effective Recruitment Strategies

Having access to human resources is important for most organizational leaders. Nonprofit organization leaders often have limited access to financial resources. Due to this limited access to financial resources, having adequate funds to access human resources can be difficult. Because of this reason, nonprofit organization leaders often have to rely on volunteers to help complete tasks and responsibilities associated with operating the organization. With JJMU organization, one of the themes identified during the data analysis process was the need to improve recruitment strategies' effectiveness.

The ED at JJMU was actively participating in hiring additional counselors to serve the increasing demand for mental health counselors. The urgency in recruiting additional counselors became more evident as the effect COVID-19 had on the community residents was realized. Participant 1 communicated that hiring counselors were challenging due to the limited salary amount that could be offered. Also, participant 1 shared that the number of qualified candidates has been limited in the past, pointing out that this could be due to the organization's location. When recruiting for human resources, it is beneficial to understand what motivating factors influence applicants to seek employment with the organization (Saric Fashant & Evan, 2020). Once those factors are identified, a strategic approach could be to appeal to those factors and highlight the benefits of working for the organization and the surrounding community.

Effective recruitment strategies are critical to ensuring JJMU organization has the resources needed to manage the daily operations of the organization. The stakeholder theory emphasizes the importance of identifying who the stakeholders in an organization are and how they play a role in the success of the organization. Employees and volunteers have critical roles in nonprofit organizations. In JJMU organization, addressing the need for effective recruitment strategies will benefit existing stakeholders and potential new stakeholders. Without counselors, office staff, and volunteers, the workforce of JJMU might not have the capacity to meet the existing and growing needs of community members. Applying the stakeholder theory is beneficial in reiterating the emphasis needed on having adequate human resources to address the mission of the organization.

Product and Process Results

JJMU organization is a nonprofit organization; the ED works with stakeholders and partners to provide counseling services to the community. The organization has been operating for over 20 years and began with only one location available for services but has since grown to provide services at three office locations. The product and process results section is comprised of information describing the customer-focused product and service results. These results are related to the services, work processes, safety, and supply-network management areas for the JJMU organization.

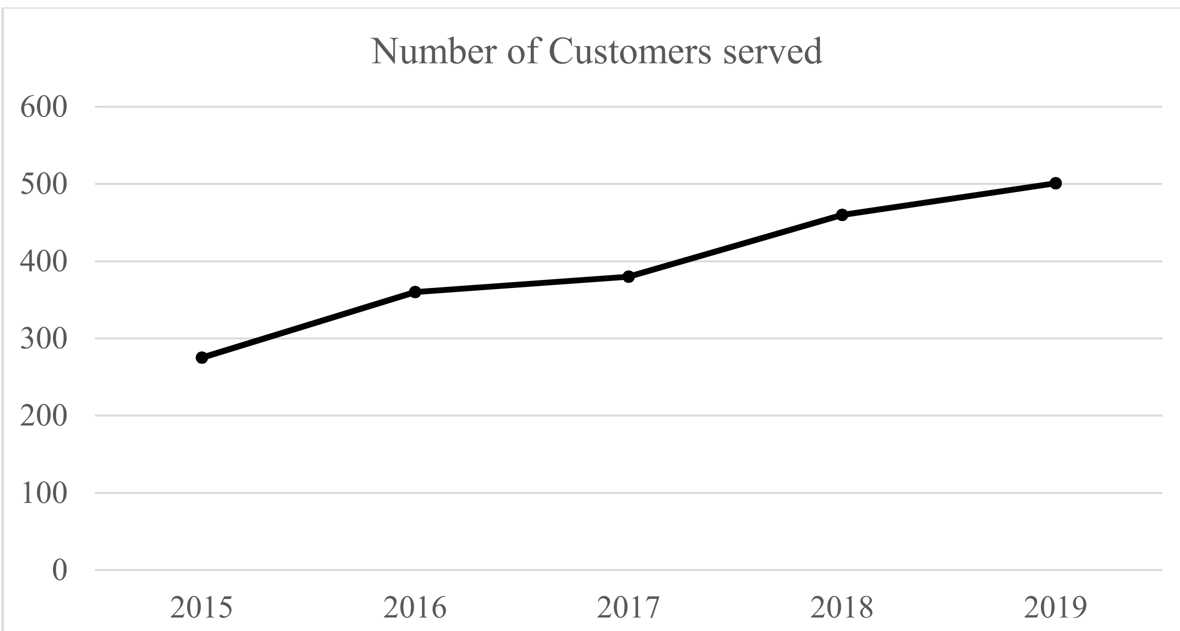
Customer-Focused Product and Service Results

Providing counseling services to individuals and families in need regardless of their ability to pay for services in the four counties serviced is the mission of JJMU. There is a customer-focus, and the workforce strives to achieve high-performance service results to the communities served. The ED collaborates with stakeholders and partners to ensure the organization's mission and vision are kept at the forefront at all times. Data relevant to the customer-focused results requires active engagement from all members of the workforce at JJMU. Although the organization has been operating for more than 20 years, there are minimal results relevant to the customer-focused products and service provided.

When the JJMU organization was established, the ED operated with one location open and provided counseling services to the community with a workforce consisting of one. Throughout the past 20 years, the organization has expanded to include four locations and a workforce consisting of nine. The number of customers able to benefit from the customer-focused product and services has increased over the years of operation (see Figure 3). Throughout the years of operations, the number of partners and suppliers has increased, creating opportunities for the ED workforce at JJMU to reach a larger number of customers and expand service offerings.

Figure 3

The Number of Customers who Have Received Services During Years 2015-2019



Work Process Effectiveness Results and Supply Chain Management

The results for work process effectiveness and supply chain management are limited. The work processes for JJMU vary depending on the needs of the communities being served. The ED takes an approach that routinely reviews the work processes and supply chain to determine if there is a need to adjust or engage in discussion with the workforce. The ED addresses any concerns related to the delivery or availability of counseling services at each of the four locations as needed. To provide quality care and counseling services to the community, the ED meets regularly with the workforce to discuss any changes or potential changes that need to take place. The office manager collaborates with the ED during the process of applying for grants and funding to ensure there is access to resources other than donations and revenue from services provided. Access to funding has varied during the years of 2016 -2020. Fundraising revenue increased from $0 to $20,220 in 2017 but decreased to $9,008 in 2018 (Figure 4). Having access to funding has allowed the ED to improve programming that meets the customer and community needs. In addition, access to funding has allowed the ED to implement the use of telemental health services fully. The ED has been able to implement programming that has resulted in positive outcomes for the community. There has been a 135% increase in total dollars spent on community outreach from 2016 -2018 (see Figure 5).

Figure 4

Fundraising Revenue Received During 2016-2020

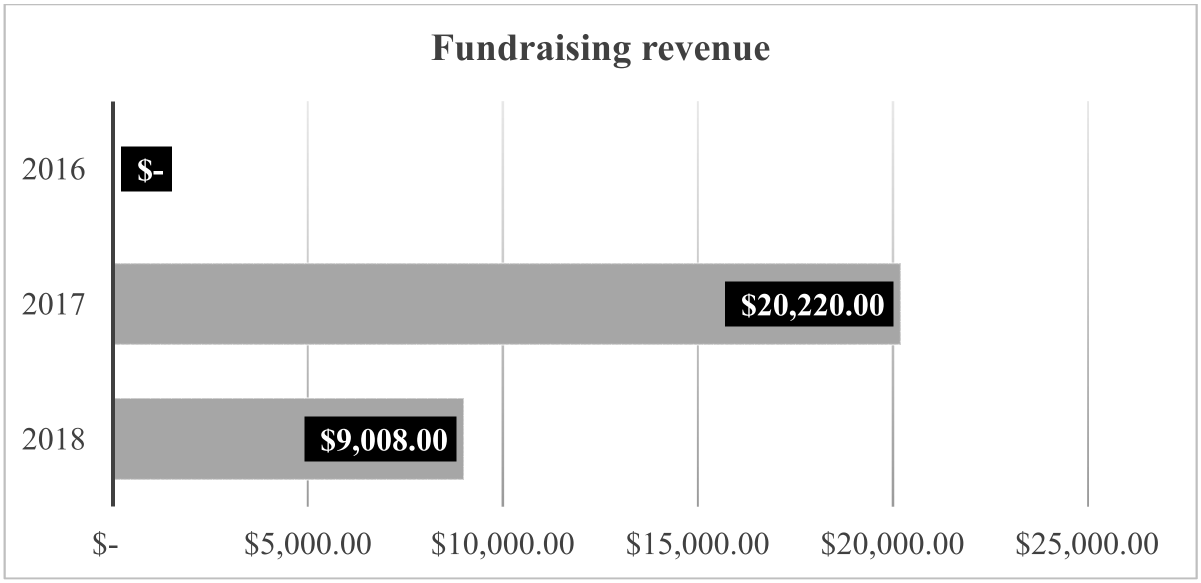
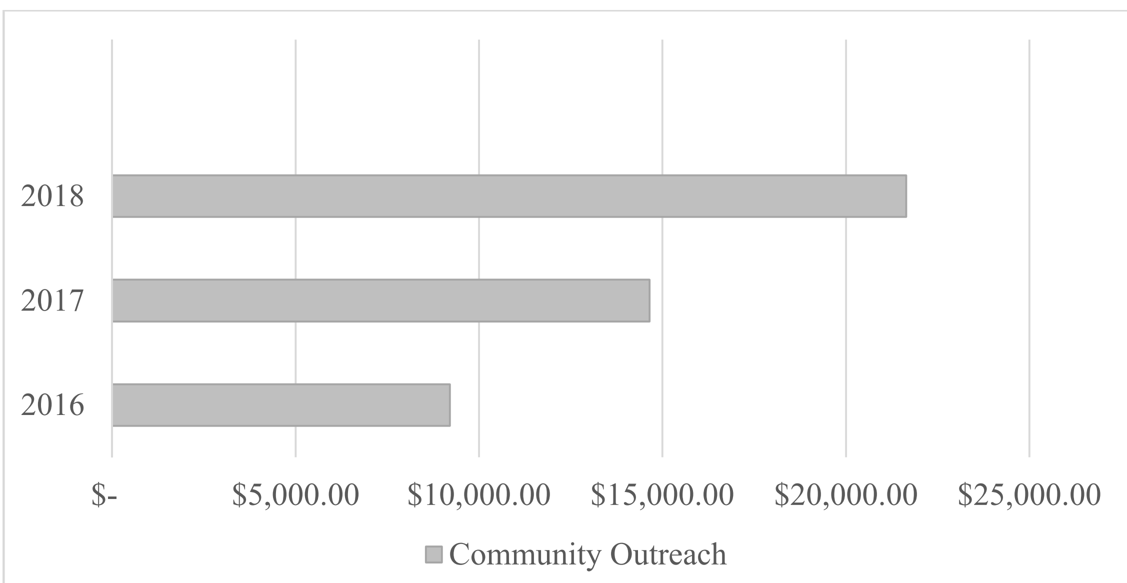


Figure 5

Total Dollars Spent on Community Outreach During 2016-2018



Safety and Emergency Preparedness

The ED cooperates with all safety and emergency preparedness requirements. The ED collaborates with local officials and church leaders to ensure each of the four locations operates under safe conditions. Additionally, the ED ensures the emergency preparedness plan is communicated to all members of the workforce to ensure prompt response and action if needed. The building locations are inspected routinely by local authorities as required by the governing state and local laws. There have been no reports of safety or emergency preparedness concerns. The ED at JJMU reports 100% compliance with safety inspections and emergency preparedness for all four locations.

Customer Results

Customer-Focused Results

Providing services to the community focusing on providing excellent care, treating individuals with respect and dignity are key elements of the work done at JJMU. The workforce at JJMU welcomes customers to the organization regardless of their ability to pay for services. The approach at JJMU is to provide an environment conducive to offering support and counseling built on a spiritual foundation. To better understand how customers rate their satisfaction with the services received, the ED conducted a customer survey in 2017. The survey results indicated that customers have high satisfaction rates and are pleased with the services offered (Table 4). A total of 301 surveys were administered; 261 were fully completed and included in the survey results. There is an opportunity for the ED to implement a process of conducting customer satisfaction surveys on an annual basis. Surveying on an annual basis will allow the ED to use the data collected to determine any trends in customer satisfaction and any opportunities for improvement.

Table 4

Customer Satisfaction Survey Results

Area of Concern	Percentage of Customers
Wait Time	98%
Customer Service (Staff)	100%
Benefit of information/assistance received	99%
Respect given by the counselor	99%
Concerns addressed	98%
Professionalism of Counselor	99%

Workforce Results

Workforce-Focused Results

The workforce at JJMU is vital to the execution of providing counseling services to the customers. The success of JJMU relies heavily on the workforce and their ability to provide counseling services to the community. The ED has increased the workforce during the past 20 years. However, to continue to provide services to the community and meet the growing need for counseling, the ED would need to increase the number of workforce members. The workforce members responsible for providing counseling services earn wages based on the number of customers they provided. The wages paid can reflect positive data due to the wages paid to be a percent of the insurance companies' fee reimbursements. Higher percentages of fee revenue indicate financial success, growth, and stability. As of the second quarter of 2020, there are no volunteers employed at JJMU, and all workforce members earn wages and salaries.

The partnering churches own the facilities used at each of the four locations. The ED takes part in any evaluations and assessments as needed to ensure the workplace climate is safe and secure for the workforce and customers at all times. As of the second quarter of 2020, there have not been reports of incidents or safety concerns at any of the four locations for JJMU. The workforce at JJMU is engaged and active in planning and developing new programs and changes that occur. The ED promotes workforce engagement through opportunities that include formal and informal meetings to discuss ideas and resolve issues. During these formal and informal meetings, the ED allows and encourages the workforce members to share their opinions and feedback. This approach increases opportunities for the workforce to partner together to provide excellent care and services to the community.

Leadership and Governance Results

Leadership, Governance, and Societal Contribution Results

The ED demonstrates leadership, focusing on being transparent and forthcoming to remain in compliance with environmental, legal, and regulatory requirements. The office manager prepares monthly reports that the ED reviews. The data is reviewed to identify issues that might need to be addressed. As of the second quarter of 2020, there have been no issues identified that need to be addressed by the ED. The ED willingly hires an independent party to conduct an annual audit of financial records for JJMU. Due to the size of the JJMU organization, financial audits are not mandated by the state. Additionally, the counselors are subjected to a random audit during the licensing process.

Insurance carriers such as Medicaid can also conduct audits of records, service delivery, and facilities.

The ED ensures the JJMU organization is in 100% compliance with regulatory requirements. The ED can meet compliance with assistance and support from the workforce and BOD at JJMU. The ED meets annual requirements to maintain 501 (c)(3) status. Due to the limited size of the organization and the respect for anonymity, the ED does not administer a survey related to leadership engagement effectiveness to the workforce or BOD. The ED is committed to working collaboratively with the workforce, BOD, and community partners to provide counseling services to those in need in the community.

Financial and Market Results

The financial performance measures are critical to the success of the JJMU organization. The ED and BOD review the financial results of JJMU routinely to compare and understand any trends in the data. The financial outcomes are used to help guide the approach the ED and BOD will recommend to advance the mission of the organization further. Revenue for the organization is received from grants, charitable contributions, fee reimbursements, and fundraising. The ED has acknowledged there is a need to increase access to financial resources. To help increase access to financial resources, the ED has taken an approach to include two additional fundraising events in 2019, with positive financial outcomes and increased community awareness. The ED reported successfully winning a grant in 2020 that has allowed for increased services for the lesbian, gay, bisexual, and transgender community.

There have been differences in total revenue earned compared to total expenses during 2016 – 2019. In 2017, the total revenue earned was approximately $100,000 lower than the total expenses (see Figure 6). The expenses for JJMU are broken down into total expenses versus the program expenses and administrative expenses (see Figure 7). There is a small percentage of funding spend on administrative expenses. The ED spends most of the earned revenue on operating expenses to fund programming for the customers.

Using GuideStar to retrieve financial data, I reviewed the IRS 990 forms filed for 2016 – 2019 for four nonprofit organizations of comparable size and similar service offerings as JJMU. After reviewing the comparison data, I identified that during the years 2016 – 2019, each of the four organizations experienced at least 1 year with a financial loss, and the amount of total revenue earned less than total expenses. Throughout the years 2016 – 2019, a reported financial loss of total revenue earned less than total expenses occurred during 5 of the years. The average difference between total revenue earned and total expenses was $11,480. After reviewing the four nonprofit organizations' financial data, the highest amount of the difference between total revenue earned and total expenses was $30,000. Compared to the four nonprofit organizations of comparable size and similar service offerings, leaders of JJMU are experiencing a more considerable financial loss than other organizations. There is an opportunity to explore strategies further to minimize the risk of financial loss.

Figure 6

Total Revenue and Expenses

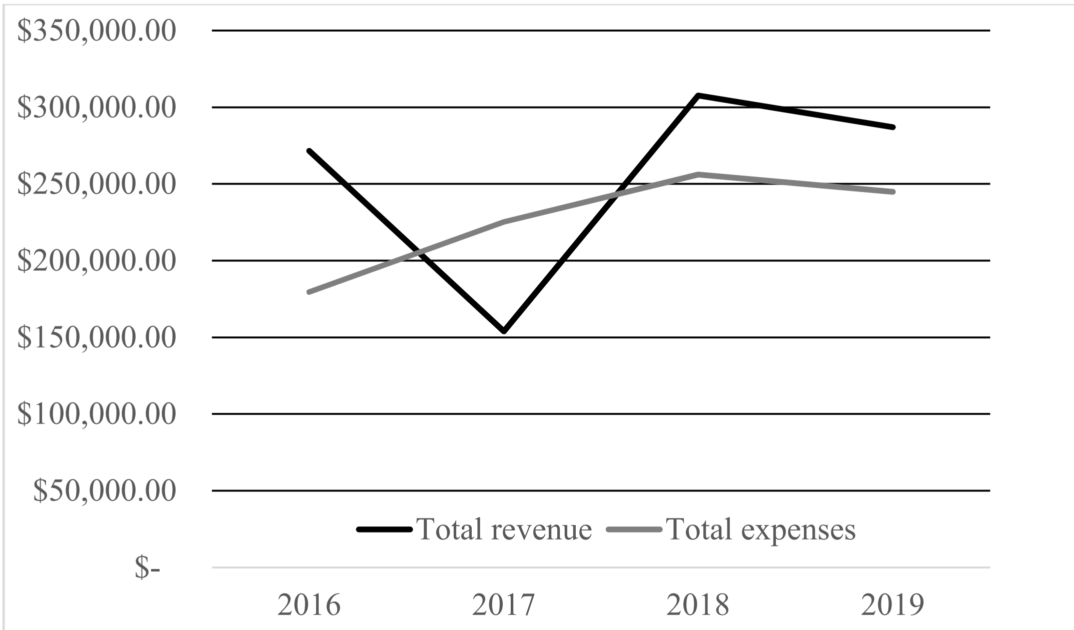
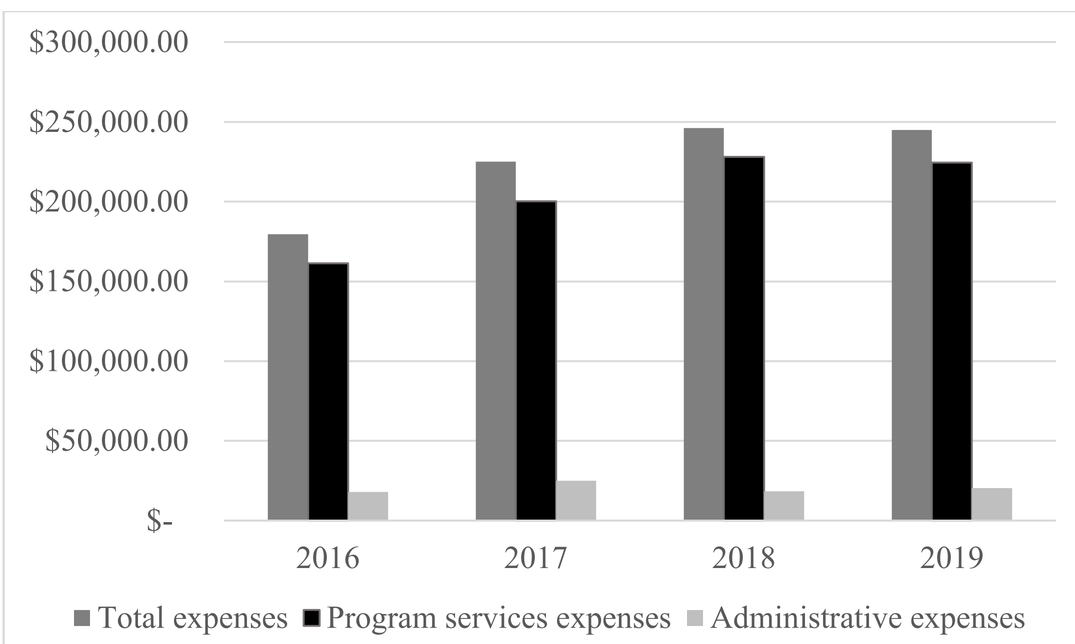


Figure 7

Total Expenses Compared to Program and Administrative Expenses



Strategy implementation results. The ED implemented telemental health services to customers with successful outcomes noted during the first eight months of use (see Figure 8). With the addition of telemental health services, all workforce counselors were trained on how to use the technology used as the platform. There was 100% compliance by all counselors in using the platform to provide secure and private counseling services. As clients begin to transition to face to face visit encounters in the office, telemental health services have continued to be used. The ED is actively recruiting counselors to increase the available workforce for supporting telemental health services to the local and neighboring communities.

One of the strategies implemented is increasing access to funding and resources. The ED has implemented fundraising events to help supplement the total revenue. In addition, the ED solicits funding and grants from local partners and stakeholders. The amount of expenses directed toward fundraising has been minimal during the operating years of 2016 - 2020. In 2016, $223.00 was spent on fundraising efforts with no expenses reported for years 2017, 2018, and 2019. There have been varying contributions and grant funding received during 2015 – 2018 (see Figure 9). In 2016, there was a decline in contributions and grants received, with a significant increase in the year 2017. Figure 10 shows that the total funding received from contributions is detailed and divided by partner grants, membership dues, fundraising events, and other contributions or gifts. In 2017, there were successful efforts to increase funding from fundraising sources with a total amount of $20,220.

Figure 8

The Number of Telemental Health Visits During January – August 2020

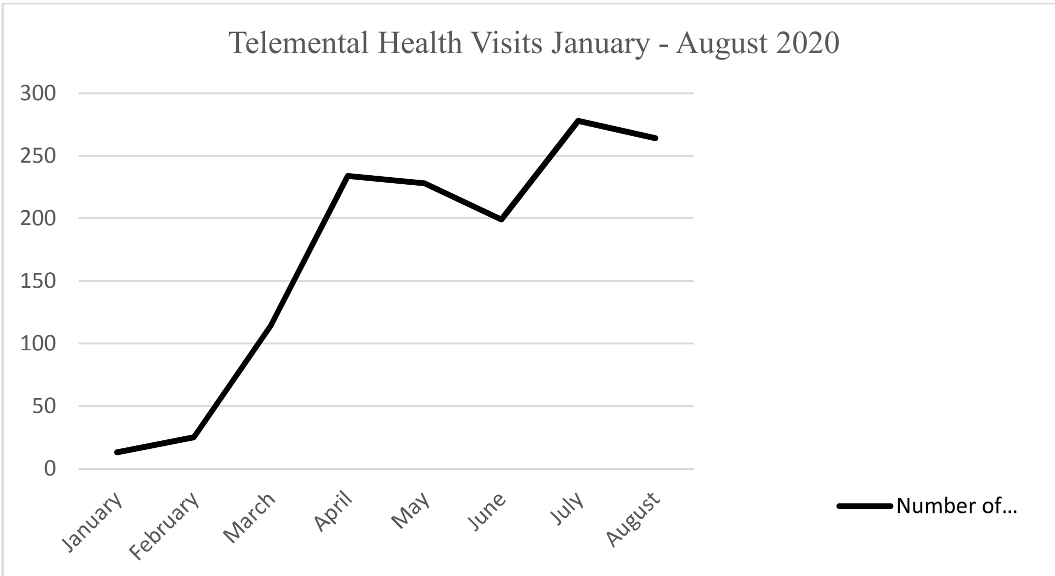


Figure 9
Total Contributions and Grant Funding Received

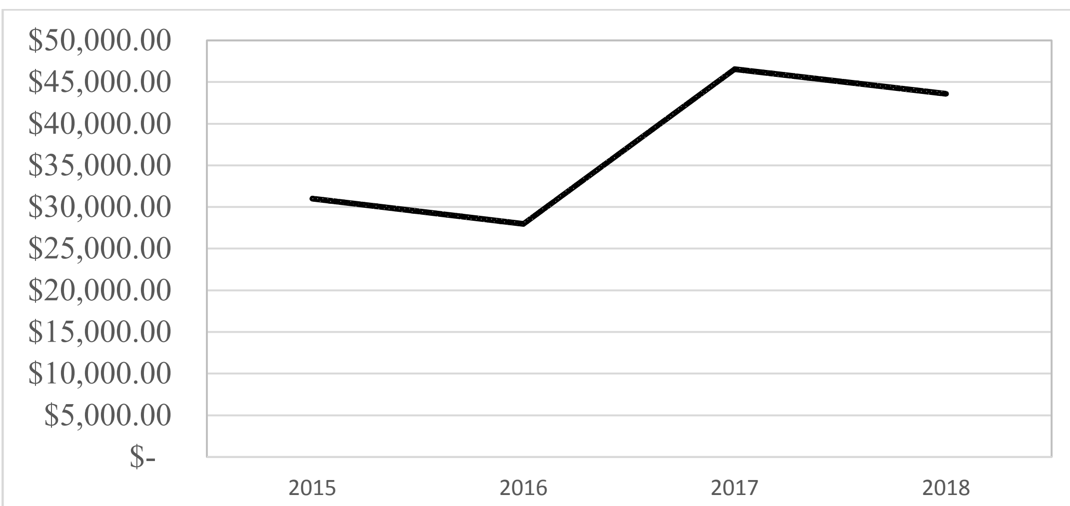
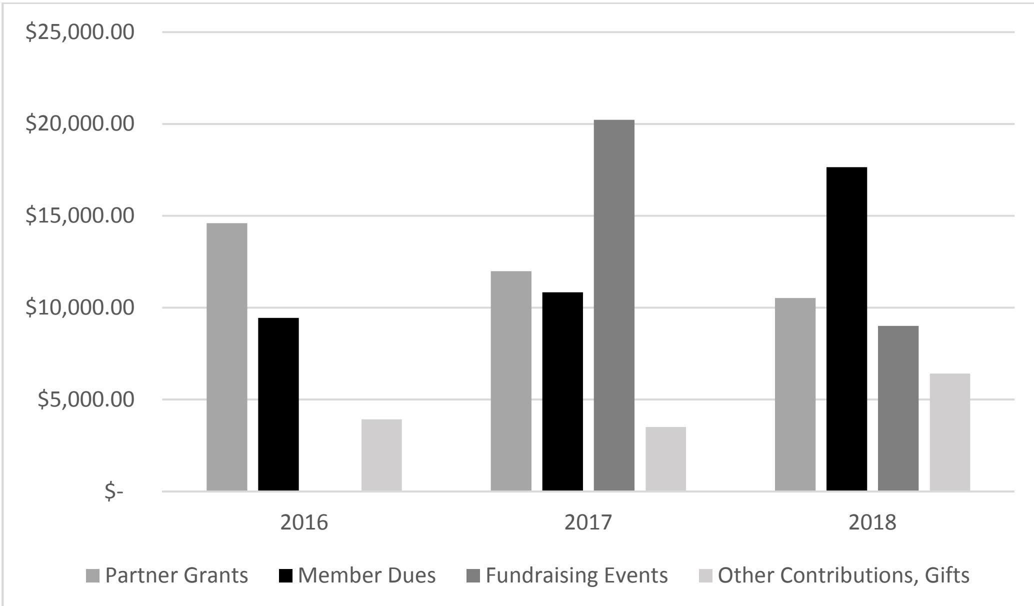


Figure 10

The Total Funding Received per Contribution Source



Key Themes

I conducted a thematic analysis using the data I collected from the semistructured interviews conducted, reviewing organizational documents, reviewing social media, public data, and website information. The key themes that emerged from the thematic analysis include the following: (a) effective fundraising strategies, (b) community involvement, (c) board effectiveness, (d) strategic planning, and (e) effective recruitment strategies. The stakeholder theory was used as the conceptual framework lens to view improvement opportunities and present information leaders at JJMU can use to improve operational efficiency.

In analysis of the key themes and processes identified for JJMU, I applied the evaluation factors of (a) approach, (b) deployment, (c) learning, and (e) integration to evaluate the organization. The term approach refers to the steps leaders of an organization take to develop and implement processes and how effective and repeatable the processes are for operating the organization (Baldrige Performance Excellence Program, 2019). The term deployment refers to how well leaders of an organization can operate consistently to essential and relevant topics concerning the organization (Baldrige Performance Excellence Program, 2019). Learning is a term used to describe the extent to which leaders of an organization are implementing innovative ideas and processes to support efforts toward improvement (Baldrige Performance Excellence Program, 2019). Leaders demonstrate integration through efforts to ensure alignment of organizational needs, processes, plans, actions, and measurable results (Baldrige Performance Excellence Program, 2019).

In the results section, JJMU organization will be evaluated using criteria that review (a) levels, (b) trends, (c) comparisons, and (d) integration. Applying the Baldrige Performance Excellence Program, researchers can evaluate the outputs and outcomes the organization's leaders accomplish (Baldrige Performance Excellence Program, 2019). Researchers apply the term levels to review measurable metrics and identify and review trends to compare performance (Baldrige Performance Excellence Program, 2019). Comparisons are made to similar organizations for benchmarking purposes and evaluation; while integration refers to how the organization's leaders use metrics to ensure requirements are met related to customers, products, and processes (Baldrige Performance Excellence Program, 2019).

Process Strengths

The mission and vision for JJMU provide a foundation for the services provided to customers. The actions performed by the workforce, community partners, and leaders at JJMU demonstrate the level of dedication to providing excellent care to the customers served. The ED makes a significant effort through active and ongoing communication with the workforce to reiterate the work's purpose and provide an environment where caring, kindness, and preserving mental health are a priority. Through collaboration with partners, suppliers, and key stakeholders, the leaders of JJMU have been successful in developing community relationships that help raise awareness about the services offered. Additionally, relationships and partnerships have led to successful outcomes resulting in financial resources received through grants and donations.

Process Opportunities

The leaders of JJMU have the opportunity to implement an approach that might improve strategic planning processes for long-term sustainability and successful outcomes. Although there have been discussions about strategic planning, the plans identified did not provide strategies for goals to achieve from a long-term perspective. In addition to short term goals, there are opportunities for leaders to develop and integrate long term goals for the JJMU organization's success. There is no formal identified and written documentation for succession planning if the ED no longer works for JJMU. It is currently written in the by-laws governing that the board of directors' responsibilities are to recruit and hire an ED if there is a need to do so. However, there are opportunities to deploy an approach that includes a strategic outline for succession planning by providing formal leadership and professional development opportunities for the workforce members.

Results Strengths

The JJMU organization leaders have achieved successful results in increasing fundraising resources and grant resources received during the years 2018-2020 compared to previous years. However, there are still opportunities to increase the platforms used for fundraising at JJMU. The services provided to customers in the service area for JJMU has increased since the organization began operating. A significant change in the number of customers reached, leaving a long-lasting impression in the local community. The partnerships with community stakeholders have fostered the approach to reduce stigmas related to seeking mental health counseling services.

Results Opportunities

The results for the JJMU organization reveal the opportunity to standardize the process for receiving customer feedback. The ED administered one customer engagement survey in 2017 but has not taken an approach to administering an additional survey since then. Seeking feedback from stakeholders is valuable information the ED can apply to implement innovative and relevant changes to meet the stakeholder's needs. There is an opportunity to identify key performance indicators and integrate a process to evaluate the metrics and present findings for strategic planning purposes. Understanding the opportunities and areas where improvement can occur increases the likelihood of achieving successful outcomes and the organization's sustainability. Although efforts have been made to increase fundraising efforts for the organization, there are additional opportunities to improve outcomes. The ED identified a couple of events taking place to help with fundraising efforts for JJMU. There are opportunities to increase the results of fundraising efforts to provide additional access to resources. There is concern among senior leaders that not enough effort is made to explore additional avenues of fundraising. Additional access to resources would provide the leverage needed to take an approach that includes hiring additional workforce members and the deployment of innovative program services.

Project Summary

Nonprofit organization leaders face challenges related to having adequate resources to successfully sustain their operational needs. Having limited access to human and financial resources can reduce the opportunities nonprofit organization leaders can pursue. Nonprofit organization leaders benefit from understanding how the availability of finances for the organization affects the limits of achieving organizational capacity (Kim, 2017). Organizational leaders often face challenges with having the necessary resources to provide the services offered and meet stakeholders' needs, including but not limited to employees (Shon et al., 2019). To successfully carry out the organization's mission and vision, nonprofit organization leaders need to have the ability to increase human and financial resources. Having access to human and financial resources can reduce barriers to providing programming and services in demand for the communities served.

In this study, I analyzed the JJMU organization's strategies to increase human and financial resources to fulfill the organization's mission and vision. This study was a qualitative single case study with the stakeholder theory as the conceptual framework.

The leaders of the JJMU organization provided insight into details of the business operations of the organization. Many leaders of small nonprofit organizations face the same challenges that leaders of JJMU organizations face. These challenges include limited access to resources and struggling with finding effective ways to use the available resources while ensuring all needs are met. The stakeholder theory was used as the framework to help understand the strategies nonprofit organization leaders could use to improve stakeholder engagement.

Stakeholder support is critical to the JJMU organization's leaders because resources are received from local community partners and donations, in addition to the funds received from billing for services and government funding. Stakeholders include employees, and it is vital to maintain an adequate workforce to successfully operate the organization and provide services to clients in multiple locations. The key themes identified from the analysis of the data include: (a) effective fundraising strategies, (b) community involvement, (c) board effectiveness, (d) strategic planning, and (e) effective recruitment strategies. I used the Baldrige Excellence Framework, organizational documents, and the interview responses from participants to identify the key themes for this study. Nonprofit organization leaders might find the information presented in this study helpful in identifying strategies to increase human and financial resources. The strategies presented might help improve long-term outcomes, improve sustainability, and improve overall stakeholder engagement and support, leading to improved business outcomes and growth of the organization.

JJMU's organizational strategies to increase human and financial resources focused on (a) recruitment efforts, (b) fundraising, and (c) grant writing efforts. Applying the stakeholder theory to these strategies raises awareness of the influence stakeholders can have on organizational outcomes. According to Becker et al. (2020), stakeholder engagement depends on the level of trust stakeholders have for the nonprofit organization. Relationship building might be beneficial to nonprofit organization leaders to help build trust and increase stakeholder engagement. Expanding collaboration efforts beyond the local community might benefit leaders of JJMU to increase stakeholder involvement and improve outcomes for the sustainability of a useful business model.

Contributions and Recommendations

Nonprofit organization leaders face many challenges related to having the resources needed to operate the organization efficiently enough to achieve the organization's mission. Having access to increase financial and human resources continues to be a challenge many leaders will face in the future. To address these challenges, identifying strategies targeted for nonprofit leaders can help identify problem resolutions that have been proven to be successful and are relevant to the issues leaders in the industry face. Leaders of JJMU are committed to identifying additional resources available to meet the organization's mission. Providing mental health counseling services to the community requires access to financial and human resources. Through collaboration with stakeholders, partners, and community members, the leaders of JJMU will be able to utilize available resources to make a positive effect on the communities served.

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. Other nonprofit leaders may use the recommendations provided to JJMU organization leaders to enhance or implement strategic planning efforts to increase human and financial resources. These strategies can serve as an initial step toward improving the operational efficiency of the nonprofit organization. The themes identified in this study raise awareness of areas that can be considered to have significant relevance to stakeholders in nonprofit organizations and serve as a guide for nonprofit organization leaders as they seek to identify strategies for increasing human and financial resources.

Application to Professional Practice

Nonprofit organization leaders often have to deal with barriers limiting access to human and financial resources. These barriers are best managed by identifying and assessing the problem, followed by planning to develop effective solutions. This method to managing business problems could minimize the barriers leaders experience when operating the organization with adherence to the mission and vision. Nonprofit organization leaders are often dependent on external resources, and accessibility of these resources directly affects accomplishing the organization's mission and vision (Seo, 2020). Researchers have identified that nonprofit organizations serve an important role in society (Mpanza & Mashau, 2019). The findings in this doctoral study relate to how nonprofit organization leaders can apply strategies to increase human and financial resources needed to meet the organization's operational demands. Successful outcomes are achievable with practical planning for long-term strategies and innovative approaches to increasing resources.

The purpose of this qualitative single case study was to explore the strategies leaders of a nonprofit organization used to increase human and financial resources needed to sustain and effectively grow as a successful organization to address their mission. Nonprofit organization leaders can use this study's findings to help navigate the avenues of resources available. Leaders can apply the recommendations for strategic planning and assessment to determine the best practice approach for their organization to pursue additional resources. Furthermore, nonprofit organization leaders can use the findings from this study to help improve stakeholder engagement and better understand how to improve the relationships with existing stakeholders and develop relationships with new stakeholders.

The results of my research may add to the body of knowledge on strategies nonprofit organization leaders use to increase human and financial resources. The recommendations presented in this study can be used by nonprofit organization leaders as a guide when planning strategies for increasing human and financial resources. The recommendations nonprofit organization leaders seeking to learn about strategies to increase human and financial resources include (a) developing a long-term strategic plan, (b) evaluation and adoption of a business model to follow, and (c) implementing a process for performance measurement. Nonprofit organization leaders may use the findings and recommendations from this study to improve business outcomes by exploring other theories to support the organization's strategic plans.

The themes identified after conducting the research for this study indicate there are opportunities for improvements nonprofit organization leaders can pursue to increase the chances for achieving successful outcomes. There were five themes identified following the research conducted for this study and included the following (a) effective fundraising, (b) community involvement, (c) board effectiveness, (d) strategic planning, and (e) effective recruitment strategies. The message for nonprofit organization leaders seeking to learn strategies for increasing human and financial resources is to consider the themes presented in this study and consider evaluating strategies the organization is currently using. Following the evaluation, leaders should determine if there is an opportunity to incorporate any of the strategies presented in this study for improving business outcomes. Nonprofit organization leaders are encouraged to implement strategies that drive outcomes toward achieving or maintaining positive social change while fulfilling the organization's mission and vision.

Implications for Social Change

Social change is integrated into the doctoral programs and vision for Walden University students (Walden University, 2020b). Students at Walden University contribute to social change using their doctoral research as a platform to foster change in their communities (Walden University, 2020b). Social change can positively influence individuals and promote problem resolution by raising awareness of the many social disparities existing in the world today (Busch et al., 2019). Social change actions are driven by a specific purpose and can result in improved social structures (de la Sablonniere & Taylor, 2020). Conducting research that brings awareness and results in contributing recommendations for action and further research can directly influence social change in the community and bring about improved social outcomes (Brown & Baltes, 2017). The research from my doctoral study could influence social change in the nonprofit industry.

The implications for social change resulting from this study could lead to nonprofit organization leaders having the tools and knowledge needed to implement strategic plans. With a long-term strategic plan in place, nonprofit organizations' leaders could improve value for stakeholders that lead to long-lasting stakeholder engagement. Long-lasting stakeholder engagement could result in nonprofit organization leaders having the resources necessary to create sustainable value and organizational growth. When leaders can effectively leverage the resources and stakeholder engagement received, there are increased opportunities for positively influencing social change. Nonprofit organizations are often grounded in social change efforts based on identifying a lack of services in a community (Shier & Handy, 2016). This study's results might positively influence social change by benefiting the community through the availability of and access to services. In this study, the nonprofit organization provided mental health services to individuals living in a rural community located in the southern region of the United States.

The implications for social change resulting from this study include the opportunities to implement effective fundraising strategies leading to increased access to funding to advance JJMU organization's mission. Social change implications could also include increased community involvement resulting in improved stakeholder engagement and support for JJMU organization's mission. Community involvement could reduce any stigmas associated with mental health counseling services and lead to increased awareness about the mental health services available to the community. In addition, increased community involvement could foster interest and willingness to serve on the board of directors for JJMU organization. Board effectiveness is an important element in fostering social change as the board of directors has an important role in the strategic planning process. Effective strategic planning with an outline for long-term goal achievement could improve social change outcomes for the community JJMU organization serves. Lastly, effective recruitment strategies could benefit social change outcomes for JJMU organization. Without workforce members who have a desire and willingness to help others through counseling and support services, leaders at JJMU would not be able to fulfill the organization's mission. Improved access to mental health services could result in positive social change demonstrated through decreased health disparities, increased feelings of security, stability, and overall better health for community members.

Recommendations for Action

This section will review recommendations the leaders of JJMU organization and other nonprofit organization leaders can use to increase human and financial resources. The recommendations for action are part of the next steps following a research study and presentation of the findings. The role of the researcher includes data analysis and presenting the findings to propose actions and strategies that could be beneficial for the leaders of the organization.

The findings from this research study highlighted that nonprofit organization leaders could benefit from having a detailed long-term strategic plan in place. The findings resulting from this research study also revealed that with long-term strategies to increase human and financial resources, there are increased chances for accomplishing this goal with long-lasting stakeholder engagement and support. The number of nonprofit organizations continues to expand with services and goods provided to the community to minimize gaps identified from a lack of available resources (Walters, 2020). I recommend evaluating and implementing a business model further to develop the long-term strategic approach of JJMU organization.

Business models can be beneficial for organizational leaders when creating plans, strategies, and mapping out how the organization can provide services to the community with growth and sustainability at the forefront (Sanderse et al., 2020). I recommend that future researchers explore the strategies nonprofit organization leaders use to increase human and financial resources and the long-lasting effect the strategies have on the organizational outcomes. Understanding the strategy implementation's effectiveness might offer continued support and growth toward a long-term solution that other nonprofit organization leaders can implement. Some nonprofit organizations leaders have to find solutions for meeting the burden of managing an organization with limited access to human and financial resources.

Many nonprofit organizations leaders rely heavily on volunteers, donations, and grants to sustain the organization's daily operations. Having stakeholder buy-in and support is critical for nonprofit organization leaders as they work collaboratively to improve outcomes for the organization. Nonprofit organization leaders may see improved stakeholder buy-in through demonstrating accountability and improved transparency (Chen et al., 2018). Because stakeholder support plays such an important role in sustaining nonprofit organizations, I recommend that nonprofit organization leaders create a long-term strategic plan that includes ways to measure success.

Identifying performance measures tracked and reviewed routinely to determine what is working well and what is not working well could add value for stakeholders. Involving stakeholders in the strategic planning process improves stakeholder engagement opportunities and opens the door for innovative ideas and networking (Jordan et al., 2019). When stakeholders have a clear understanding of how the organization manages funds received and the benefits of how the funds are used, it could lead to additional long-term stakeholder support. With future research efforts, there are expanded opportunities to share findings and results with nonprofit organizations' leaders to enhance stakeholder engagement for long-term support needs.

The recommended target audience for this research is nonprofit organization leaders. After identifying the target audience, the results from this research might be disseminated in various ways. The results could benefit nonprofit organizations' leaders by publishing the information in journals and publications focused on literature relevant to leading nonprofit organizations. Consideration for developing a toolkit for nonprofit organization leaders might also be an option to help disseminate results from this research.

The results of this study will be accessible by nonprofit organization leaders and leaders in other industries through database access. Study results may also be accessible through additional methods such as conferences, professional development events or, lectures. Disseminating the results of this study using these delivery methods may benefit the approach to achieving successful outcomes for nonprofit organizations and communities served. This study's results may be used to help leaders in their efforts toward continuous improvement and sustainability.

Recommendations for Further Research

The recommendations for further research focus on the opportunities for other individuals to conduct research in the specified field of study. The literature review completed for this study included a comprehensive overview of the conceptual framework and the topic of increasing human and financial resources to sustain and effectively grow nonprofit organizations. Following the completion of the literature review conducted for this study, the opportunities that exist for further research on this topic were revealed.

There were two limitations identified for this doctoral study. The first limitation of this research was the participants and interviews were limited and derived from one mental health nonprofit organization located in the southern region of the United States. The results and findings may not represent strategies used by most or all nonprofit organization leaders. The second limitation of this study was that I only had access to the organizational and archival data provided to me and available to the public. Based on this study's identified limitations, recommendations for further research would include conducting additional research to expand the scope and include an increased number of participants and research strategies used by leaders of multiple nonprofit organizations.

Conducting additional research to understand further the strategic approach to increasing human and financial resources and how to sustain the resources for a long-term approach would be beneficial. Findings from further research could help nonprofit organization leaders understand how to move forward with achieving successful outcomes. Additionally, nonprofit organizations' leaders could have evidence-based best practices that could benefit the community to better understand how support is generated, sustained, and results in positive outcomes for all stakeholders involved. Future research efforts might include developing a guide to including evidence-based best practices for nonprofit organizations' leaders to follow in efforts to strive toward continuous improvement in accessing human and financial resources to advance the organization's mission.

Reflections

Completing the doctoral research process was both challenging and rewarding for me. During the time I spent completing my research, I gained valuable insight that will prove to be beneficial for years to come. Having the opportunity to be a scholar-consultant in the doctoral consulting capstone at Walden University provided additional benefits for me. The opportunity to conduct research using the Baldrige Excellence Performance Program afforded me the chance to work closely with leaders of a nonprofit organization and learn firsthand the specifics of operating the organization. Additionally, I learned how to apply the Baldrige Excellence Framework to conduct an evaluation and assessment of an organization's operations. The challenges I faced during the doctoral research process allowed me to face my fears and experience personal and professional growth. During the research process, I overcame personal doubts and lack of support from friends and family members to push forward and complete the doctoral journey I set forth to accomplish.

The completion of my doctoral journey did not come without personal sacrifices, self-discipline, and self-motivation. Through my experiences, I have been fortunate enough to improve my way of thinking, develop long-lasting friendships, and improve personal characteristics. During my journey, I realized that it is okay to ask for help. It is okay to not fully understand the instructions or need further clarification to grasp a particular concept. With the support of the Walden University faculty, peers, colleagues, close friends, and family, I was able to self-reflect on my doctoral journey with a feeling of appreciation, reward, and humility.

Conclusion

This research aimed to advance the knowledge of how to increase human and financial resources for nonprofit organization leaders to sustain and effectively grow a successful organization and address the organization's mission. Identifying human and financial resources can benefit nonprofit organizations' leaders in their efforts to maintain the services provided to the communities served effectively. Nonprofit organization leaders can minimize risks and improve business outcomes with access to human and financial resources. With minimized risks and improved business outcomes, nonprofit organization leaders would be better positioned to expand on the services provided by the organization and reach an expanded number of individuals. Using the Baldrige Performance Excellence Program to evaluate JJMU organization was beneficial for me to understand the organization's business operations. I was able to make recommendations that would render advantageous outcomes to foster the continued growth of the organization.

The findings from this research study highlighted what strategies nonprofit organization leaders use to increase human and financial resources. Nonprofit organization leaders can take away from this study an understanding that there are challenges associated with increasing human and financial resources; however, with strategic planning and community support, those challenges can be significantly minimized. Nonprofit organization leaders can have improved outcomes by investing time to develop a strategic plan to identify short and long-term goals. Nonprofit organization leaders are encouraged to enlist community stakeholders, advocates, and partnering agencies from a local, regional, and or national level. Leaders are encouraged to explore as many avenues as possible increases the outcomes for increasing human and financial resources with long-lasting influence and sustainment.

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Appendix A: Interview Protocol

Exploring Strategies Nonprofit Organization Leaders Use to Increase Human and Financial Resources

1. The interview protocol begins.
2. I will introduce myself to the participant.
3. The participants of the study will have been given the opportunity to read the informed Consent Form and provided their consent via email, agreeing to participate in this research.
4. I will thank the participant for his or her agreement to take part in this research study.
5. I will review with the participant the process for withdrawing from the research study.
6. I will ask the participant for permission to digitally record the interview.
7. I will provide the participant with information regarding the member checking process, to take place after the transcript interpretation. I will schedule a date and time to review with each participant the data collected to ensure reliability and validity of the data.
8. I will start the recording of the interview, noting the date, time, and location of the interview. I will have available for use, writing tools to take notes as needed during the interview.

9. I will introduce the participant to his or her alphanumeric code for identification (I.E. Participant 1, Participant 2, Participant 3) on the audio recording and place the information on the copy of the consent form.
10. I will begin the interview.
11. I will begin the interview with question # 1 and follow through to the final question (See Appendix B).
12. I will complete the interview sequence.
13. I will thank the participant for his or her time and participation in the study.
14. I will reiterate my contact information for any follow-up questions or concerns that may arise.
15. I will end the audio recording.

The interview protocol ends.

Appendix B: Interview Questions

1. How do you assess the effectiveness of strategies used to increase human resources to sustain and effectively grow as a successful organization?
2. What, if any, strategies have been successful in generating human resources needed to sustain and effectively grow as a successful organization?
3. What, if any, strategies have not been successful in generating human resources needed to sustain and effectively grow as a successful organization?
4. How do you assess the effectiveness of strategies used to increase financial resources needed to sustain and effectively grow as a successful organization?
5. What, if any, strategies have been successful in generating financial resources needed to sustain and effectively grow as a successful organization?
6. What, if any, strategies have not been successful in generating financial resources needed to sustain and effectively grow as a successful organization?
7. What role do senior-level leaders have in the implementation of strategies to increase human and financial resources to sustain and effectively grow as a successful organization?
8. What key barriers has your organization encountered that limited your ability to increase human and financial resources to sustain and effectively grow as a successful organization?
9. What, if any, strategies have you used to overcome those key barriers that limited generating human and financial resources to sustain and effectively grow as a successful organization?

10. What additional information can you provide related to generating human and financial resources to sustain and effectively grow as a successful organization?