

2022

## Determinates for Sustainability: Non-Profit Professional Membership Organization

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# Walden University

College of Health Sciences and Public Policy

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  
2022

Abstract

Determinates for Sustainability: Non-Profit Professional Membership Organization

by

Cindy T. Delu

MA, Columbia Southern University, 2016

BS, California State University, Northridge, 2012

Professional Administrative Study Submitted in Partial Proposal

of the Requirements for the Degree of

Doctor of Public Administration

Walden University

November 2022

## Abstract

Nonprofit professional membership organizations have become increasingly present within specific fields, yet little is known about the capacities of these organizations to accurately represent their members and encourage others to be part of a specific community that offers goal-achieving opportunities. In this qualitative study, a framework was proposed to understand the representations needed in a professional nonprofit to aid in understanding how executive leaders use representation strategies to engage current members and potential prospects. The concepts of representation (COR) theory is a framework centered around five dimensions focused on relationships between the organization and its members to clarify and identify capacity measures. To conduct the in-depth study, practice-focus questions included direct interview questions to current members, executives, and the board of directors of the organization that focused on long-term sustainability, marketing, social media platform engagement, and the promotion of new and existing programs and services. The findings suggest that a solid framework may not be effectively used to recruit and retain members, accurately represent its members, or have valuable programs and services that professional members seek when committing to a membership association. Potential implications for positive social change included improved brand awareness, community engagement, and organizational practices that focused on the needs of members to provide advanced opportunities within the nonprofit.

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## Dedication

First, I must thank myself for pushing through countless obstacles throughout this journey. Through all the challenges encountered, I had to encourage myself to be resilient regardless of how difficult the journey became while battling unforeseen circumstances, sacrificing, and practicing patience. I had to learn to give myself grace and trust that the goals I have set out for myself, were going to be accomplished. Strength, dedication, resilience, purpose, and trust in my higher power carried me to the finish line.

I would also like to thank my parents – one still with me, and one now looking down upon me. Coming to this country, both of your goals were to always make sure your children were afforded the best opportunities and accomplish all our desires, despite both of you being from underprivileged countries. To my siblings, thank you for your encouraging words and your congratulatory messages with each milestone accomplished. Thank you All for your support, love, and sacrifice while on this journey.

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Lastly, I would like to thank the executive director of the organization, Robert Crosby. Though his passing came as a surprise at the end of this journey, I was greeted with the support of the organizations Board and Assistant Executive Director, Kayby Arce to continue with the research, as this was something Robert was so excited for and happy to be part of. Thank you for allowing me to collaborate with you, the organization, and its members to achieve valuable insight on the organizations problems and provide you with recommendations on how to resolve them.

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## Section 1: Introduction to the Study

Determinants for sustainability within a professional organization can significantly impact how well an organization can sustain long-term. In the current economic crises and changing times, nonprofit executives experience challenges related to the engagement and efficient communication with stakeholders (Bandyopadhyay & Dayton, 2013), especially as they relate to prospects becoming new members. Developing improved strategies and improving brand awareness can increase community engagement and can be a determining factor for joining a professional organization. Because sustainability of professional organizations is dependent upon maintaining steady growth and acquiring new memberships which generate income, executives should focus on creating a new framework to develop redefined programs and structures that best aligns with the mission and enhanced operational strategies. In this study, I explored frameworks that executives of nonprofit professional associations can use to address long-term sustainability and effective ways for gaining new memberships.

### **Background of Client Organization**

The organization is a nonprofit professional membership association that has experienced a decline in membership that directly affected its source of revenue and needed a recommendation memo that outlined long-term sustainability and effective ways for membership growth. Because this is an association of industry professionals, the organization relies on memberships as its core funding, otherwise it may jeopardize the organizations independent agents and corporate partnerships sustainability.

### **Background of the Problem**

The organization is experiencing a decline in memberships which directly affects its source of revenue and needs a recommendation memo that outlines long-term sustainability and effective ways for membership growth. Although the organization has been in operation for decades, challenges related to expected growth levels have always been present. Improving organizational operations, brand awareness, service products, and community engagement can produce ideal results that promote healthy membership growth and longevity. Currently, there are only 180 active members, which is far below the expectation, given the length of time the organization has been in operation. Of the 180 members, only 25 have been added within the last 5 years.

To understand and tackle the member-organization disconnect, the organization intends to address determinants for long-term sustainability with core values that align with its mission statement and culture. By understanding the true needs of its members, the organization can make decisions associated with future achievable goals that align with its original purpose for existence.

### **Problem Statement**

The problem is that the lack of increased membership has led the organization to consider all aspects of determinants for sustainability to improve organizational growth, brand awareness, community engagement and the potential for an enhanced service product. Unfortunately, without steady growth of annual memberships, the organization may experience a pitfall to its operational ability, in addition to possible negative social

implications that could affect the culture, values, and mission should the organization fail to improve overall.

### **Purpose of the Study**

The purpose of this qualitative study was to investigate and identify determinates to encourage long-term sustainability within the professional membership association and provide the organization with a recommendation memo that outlines long-term sustainability measures. My intent was to implement a framework that focus on the different representation theories once used in democratic governance, to now be applied in a nonprofit professional membership organization. The concepts of representation framework shows that the nature of representation within an organization is indicated by five dimensions: substantive, symbolic, formal, descriptive, and participatory representation (Pitkin, 1967; and Guo & Musso, 2007). The guiding question for this study was: What are the contributing factors causing limitation with membership growth? I used the implementation of an appropriate framework to determine and support sustainability in nonprofit professional membership organization. The target population for this study was stakeholders of the nonprofit professional membership organization.

### **Nature of the Administrative Study**

Qualitative research is the methodical assembly, organization, and explanation of recorded material derived from dialogue or conversation (Grossoehme, 2014). To address the research question in this qualitative study, the researcher explored how and why the phenomenon in question was occurring (see Yin, 2014). I developed an interview protocol to inquire about each of the five dimensions to evaluate how the organization



scores on each dimension (see Appendix A). I provided members from the organization who agreed to participate in this study with the details of the research design and the data collection process. Qualitative research involves the gathering of information that occurs through open-ended techniques for exploring the common concepts or themes to understand the phenomenon (Turk & Kalarchian, 2014). I conducted generic qualitative research through interviews to explore the phenomenon of lived experiences. A phenomenological design reveals participants' perspectives on an event or situation; in such a study, the researcher tries to answer the question of the experience (Gill, 2014). Furthermore, examining tributing executive roles concerning service programs, strategies, sustainability, and membership growth provides an opportunity to explore the phenomenon approach. A qualitative study was suitable for exploring the phenomenon of sustainability through participant perspectives in nonprofit professional organizations.

### **Significance**

This qualitative study was significant in that the findings from this research have included an improved framework and high-quality service programs that the organization's current members and prospects can use. The value of this study is that I directly addressed the specific case in its actual context (see Yin, 2016). Using social platforms to encourage direct feedback from current members, can offer insight to what the organization should modify to better fit the needs of its members and prospects which can encourage a more efficient operation and the potential for a rewarding outcome. Stakeholders impacted due to the study and implementation of the framework include current members and prospects, the executive director, board of directors, and any

corporate partners. Changes to the organization could have positive social implications including the ability to address the needs of current and future members for long-term sustainability. Furthermore, improving brand awareness can increase community engagement and be a determining factor for joining a professional membership organization.

### **Significance to Practice**

By implementing Pitkin's concepts of representation framework, the organization can assess operational issues by making appropriate changes and adopting new practices that aligns with an improved mission and purpose. I used the framework to identify areas of weakness and apply enhanced performance methods that could drastically scale sustainability efforts in the organization by pivoting in areas that cater more to its constituents by redefining its service programs, community engagement, and brand awareness. The organization can benefit from this study by understanding how its current internal methodologies are outdated and pivot in areas that best align and is beneficial to both the organization and its members.

### **Significance to Social Change**

Potential implications for positive social change include improved brand awareness, community engagement, and organizational practices that focus on the needs of members to provide advanced opportunities within the nonprofit. The significance of social change can impact the nonprofit industry tremendously. There are a large population of 501(c)(6) organizations in the United States. According to the Internal Revenue Service (IRS), there are more than 68,000 nonprofit associations in the United

States (IRS, 2014). Other nonprofit associations may be experiencing similar challenges related to sustainably and membership growth and may be seeking alternative measures to improve current operational functionality and strengthen their financial viability. A simple Google search of *501(c)(6) organization sustainability methods* returned over 124 million pieces of web content. By researching and implementing the use of the representation framework, this study can potentially be an evaluator or guideline by other executive directors (ED) and board of directors (BOD) for improved operational methods.

### **Summary**

In this section, I discussed the organizational problem and purpose of this qualitative study. The general problem that I addressed was the lack of increased membership which has led the organization to consider all aspects of determinants for sustainability to improve organizational growth, brand awareness, community engagement and the potential for an enhanced service product. Executive leaders and board members are making poor decisions that do not align with the mission of the organization, and therefore, are experiencing consequences relating to recruitment and sustainability. The determinants for sustainability within a nonprofit professional membership association can significantly impact how well an organization can sustain long-term. I understand that the organization's inability to secure new memberships directly affects funding, as it is one of the primary sources of revenue and may jeopardize the organizations independent agents and corporate partnerships sustainability. The lack of increased memberships has led the organization to consider all

aspects of sustainability to improve organizational growth by modifying any existing strategies, engagements, and programs to effectively represent the interests of the members. My goal for this study was to focus on the different representation theories by proposing the concept of representation framework regarding that the nature of the representation within an organization is indicated by five dimensions: substantive, symbolic, formal, descriptive, and participatory representation, (Pitkin, 1977). Upon completion of this study, I provided a recommendation memo that includes an outline of the ways the organization can improve its membership. In Section 2, I will discuss the background of the organization and provide insight of the different dimensions of the framework that I used in this study.

## Section 2: Conceptual Approach and Background

### **Introduction**

In this section, I examine the literature and framework that I used as the foundation of this study while also investigating reasons behind recruitment challenges experienced by executive directors. The conceptual framework is explored in-depth, along with key concepts for further understanding and the use of each. In this study, my role was to explore the thoughts and feelings of participants by understanding their lived experiences through interviewing and transcribing data to assign each to the appropriate representation category. The client deliverable included a detailed recommendation memo that includes an outline of practical long-term investments for improved operational functionality.

### **Conceptual Framework**

In this study, I used Pitkin's concepts of representation theory as the conceptual framework. The concepts of representation theory aid in addressing how executive directors in nonprofit professional membership organizations should use representation strategies to engage members and potential prospects. Although Pitkin's concepts of representation theory initially introduced to contribute "to the democratic governance by representing the interests of their constituents to the state," (Pitkin, 1967) Guo and Musso used the framework to apply it to nonprofit and voluntary organizations. In Pitkin's (1967) description, representation is a process that includes multiple dimensions that target participation from both the organization and constituents. The term "constituent" refers to a group of people who an organization aims to serve, including both members

and nonmembers (Yoshioka, 2014). Pitkin (1967) classified four main dimensions of influence: substantive, symbolic, formal, and descriptive. However, Guo and Musso (2007) introduced a fifth dimension: participatory representation, which included the direct participation relationships between the organization and its members. Additionally, there are three broad categories that registered nonprofits fall into: social organizations, which include economic groups; social groups (e.g., social clubs, research organizations, hobby groups, etc.), and membership-based public-benefit organizations; private nonenterprise organizations, which include nonprofit schools, hospitals, social service organizations, and religious organizations; and foundations (Guo & Zhang, 2013). By exploring each of the representative theories, I was able to assess the true and intended relationships between members and the organization and the expectations that members had of the organization to deliver the desired dimension of influence.

According to Pitkin (1967), substantive representative means acting in the interests of the represented, in a manner responsive to them. Symbolism is the dimension that occurs when constituents trust an organization as a legitimate representative. Formal representation occurs when formal arrangements establish leaders selected by constituents. Descriptive representation occurs when leaders of an organization mirror the characteristics of its constituents. Lastly, Guo and Musso's (2007) fifth dimension, participatory representation is the dimension that occurs when there is a direct, unmediated, and participatory relationship between an organization and its constituents. Wang (2006) developed a typology of four functions of nonprofit organizations: mobilization of social resources, provision of public services, societal coordination and

governance, and policy advocacy and influence, which can be categorized into four major types: resource mobilizers, service providers, social coordinators, and policy advocates (Guo & Zhang, 2013). The four nonprofit functions are not mutually exclusive, as an organization can concurrently perform more than one function, but emphasis on any of the functions varies with the organization or with the life stages of the same organization (Guo & Zhang, 2013). However, whether an organization can effectively perform these functions depends on its political, economic, and social environments as well as its organization's structure, process, governance, and management (Guo & Zhang, 2013). Depending on the needs of the members, the organization may be able to effectively integrate more than one function to ensure that the needs and expectations of the members are met.

A representative not only responds to those served but also attempts to form or change their policy preferences by educating them, because political interests are not self-generating but are frequently constructed by political actors (Mansbridge, 2003). A representative may attempt to change the preferences of its focal group so that the group will be more likely to share their representative's preferences and approve of their actions (Mansbridge, 2003). Members typically become involved in professional organizations for multiple reasons: to engage in social professional settings and benefit from the platform, mutual interests in relevant and purposeful policy issues and public affairs, networking opportunities, etc. Yoshioka (2014) stated that members may be highly interested in relevant policy issues because one of the reasons that members join an

organization is to support its advocacy and to receive purposive benefits from the public affairs.

Almost all interest groups send their members some type of publication that is targeted at their members (Yoshioka, 2014). By exploring each dimension for legitimacy, it can clarify and identify the capacity measures of formal, descriptive, and participatory representation and argue which representation best serves the needs of the organization and the constituents. Members and prospects can drastically affect the organizations sustainability by choosing to join and continue, or not renew membership based on interests and quality information received. According to Yoshioka (2014), members can have a large capacity to influence their organization by voicing concerns or refusing payment of dues until their organization better adhere to members mandates. These characteristics of members may allow an organization to rely on its members' voices for its advocacy, and the organization may be forced to follow its members voices due to its concerns about organizational maintenance (Yoshioka 2014). Both Pitkin's (1967) and Guo and Musso's (2007) dimensions uses the framework to evaluate how members are currently represented within the organization and guided recommendations for future organizational development.

### **Deliverable to the Client**

Upon completion of the study, I will provide a recommendation memo to the client that outline specific and practical, long-term investments that can advance the organization's current operational functions. A recommendation memo outlines the skills and abilities of the researcher, which clarifies the purpose and covers specific key traits,



as identified in the collected data (Gibbs, 2012). Based on the study results, the recommendation present areas that score higher in member preference, which may constitute the need to pivot in a specific area into a member preferred direction. The ED and BOD received tangible insight from the study to advance and fast-track the organization to achieve goals based on member results.

The memo includes a summary that outlines recommendations based on the key findings. The significance of each finding is listed and detailed, including actions needed for correction or general improvement based on the representation framework and responses from the study. Recommended actions may improve the organization's sustainability efforts that align with the findings, which may include modifying its purpose and mission for the overall general improvement of the organization. The memo explicitly detailed the cause of any challenges and offer potential positive outcomes should specific recommendations be used.

### **Key Concepts in the Study**

Pitkin (1967) identify representation as the process that includes multiple dimensions that target participation from both the organization and constituents. There are four main dimensions of influence: substantive, symbolic, formal, and descriptive. Guo and Musso (2007) introduced a fifth dimension: participatory representation, which includes the direct participation relationships between the organization and its members. Participants interviewed include key concepts that allow me to capture specific responses and measure the capacity of each (see Appendix A).

**Substantive Representation**

Substantive representation acts in the interests of the represented, in a manner responsive to them (Pitkin, 1967). Substantive representation measures how well the organization aligns its services, programs, and mission to best serve the interest of its members, while obtaining their financial goals.

**Symbolism**

Symbolism is the dimension that occurs when an organization is trusted by its constituents as a legitimate representative. Symbolism measure how members view the organization and trust that valuable and quality services and programs are delivered that legitimately represent its members.

**Formal Representation**

Formal representation occurs when formal arrangements form leaders selected by constituents. Formal representation measures the relationship between the organization and its members to identify any two-way flow of communication that includes suggestions for appropriate evaluation and decision making for selected leadership.

**Descriptive Representation**

Descriptive representation occurs when leaders of an organization mirror the characteristics of its constituents. Descriptive representation measure how well, if at all, the organization conforms to member culture in efforts to create a more conducive environment.

## **Participatory Representation**

Participatory representation is the dimension that occurs when there is a direct, unmediated, and participatory relationship between an organization and its constituents. Participatory representation is used to measure member/ organization interactions on strategic issues, improved practices, meaningful engagements, and power-sharing opportunities.

### **Relevance to Public Organizations**

Scholarly material contributes to in-depth relevance to the organizational problem by incorporating the five dimensions of representations to achieve ideal outcomes. Both Pitkin's (1967) and Guo and Musso's (2007) published material addresses the need of a recommended framework for the organization to implement a sustainable solution for its membership recruitment and retention issues. Discovering new and improved ways to use resources in a manner that prevents organizational depletion goes beyond the financial portion of sustainability. Sustainability heavily depends upon the core elements of marketing, administration, service programs, resource development, community involvement, and board and executive development which accounts for the vision, mission, and values of the organization. Sustainability in the nonprofit context is not only reflective upon financial sustainability, but leadership planning, adaptability, and strategic planning as well.

### **Organization Background and Context**

The organization is a 501(c)(6) nonprofit professional membership organization that seeks to promote the strength and value of the members. The organization is centered

around and geared toward members that are affiliated within the professional organization. One main purpose of the professional organization is to promote and provide continuing education credits to all members in efforts to maintain state-required licensing by fulfilling 24 educational credit hours every 2 years. Other benefits include access to resources and networking opportunities, professional development, certification assistance, and increased visibility by being affiliated with a reputable organization.

### **Definitions of Terms**

The research within this study included terms that are specific to the nonprofit sector. The following terms and definitions will provide clarity to fully understand the research.

*501(c)(6)*: Nonprofit professional and trade associations are eligible for the 501(c)(6) classification that covers a variety of associations, including professional membership associations. A nonprofit professional membership association (“association”) provides a platform for individuals in particular professions, such as law, tax, coaching, and management to promote the profession (Internal Revenue Service (IRS), 2014).

*Association*. Nonprofit membership or trade associations are tax-exempt under the 501(c)(6) classification for business leagues. The purpose of a 501(c)(6) organization is to serve its member and fulfill its mission whereas a for-profit’s purpose is to maximize shareholder wealth (McDonald, 2007; Moore, 2000). Dues to an association are not deductible by the taxpayer as a charitable contribution but may be deducted as an ordinary and necessary business expense.

*Board of Directors.* The board of directors (BOD) are typically members that are part of an organization and adheres to the fiduciary duty of its governing documents. The number of members affiliated are between three and five with staggered terms, but with no set limit of how long a member can serve. New members are nominated and voted on by existing members and must meet a minimum of once per year to conduct business that requires voting.

*Executive Director.* An executive director (ED) is highest paid officer of the association, comparable to the title of chief executive officer, which is popular in the for-profit sector and is gaining popularity in the nonprofit sector. The ED oversees the operations and implements the strategies of the association, monitors operations, and reports to the board of directors (English, 2020).

*Independent Insurance Agent.* An insurance agent holds a license with the state to operate and do business independently, within an agency or insurance company, by selling insurance policies through different carriers. The independent agent acts as an agent to connect buyers and sellers to facilitate a transaction (Trusted Choice, 2021).

*Mission Statement.* The mission statement not only identifies the purpose of the organization, but it also identifies the scope of an organization's operations in relation to products (Rajasekar, 2013).

*Nonprofit.* An organization's nonprofit status is determined by state law (Internal Revenue Service (IRS), 2016). Nonprofit status may provide eligible organizations with benefits within the state, such as exemptions from sales tax, property tax, or income tax (IRS, 2016).

### **Role of the DPA Student Researcher**

The role of the researcher in qualitative research can help the researcher access the thoughts and feelings of research participants, which can enable development of an understanding of the meaning that people ascribe to their experiences (Sutton & Austin, 2015). The researcher focused on credibility and trustworthiness of the research by taking an ethical and reflexivity approach. Reflexive research is the method that completely embraces and takes advantage of the subjectivity of the researcher (Smith, 2006), and requires the researcher to operate on various levels. Influences inform personal, cultural, or theoretical constructs that we use to direct our interactions in our research and represent our findings (Etherington, 2004).

As part of the data collection process, the researcher anticipated direct observation of the board and executive meetings as part of a single-side analysis. The researcher also interviewed both the chief executive and board members separately to gain insight to their perspectives on governance based on the roles and viewpoints of each involved. The researcher's role in this study was to identify why the organizational issues exist and provide determinates to implement that assist in enhancing the overall function and sustainability best aligned with the organizations mission, values, and culture. The topic was developed through the expressed concern of organizational growth by the executive director. The researcher's relationship with the participants was strictly developed for the purpose of the initiation and completion of data collection, as an acting consultant for the organization.

The motivation behind this study was to determine the root cause the organization has been experiencing over the last two decades, and beyond. The researcher, executives, and board of directors expressed high interest in determining the causes so that actions can be taken to resolve the issues to sustain future organizational success. There were no potential biases the researcher possessed; however, by strictly leveraging the COR theory framework and thorough documented data collection, it provided valuable insight into the decisions, and removed some biases, if any, that existed in the decision-making process.

### **Summary**

Currently, there are no frameworks used to encourage sustainability within the organization. Pitkin's concepts of representation framework aided in understanding how executive directors in nonprofit professional membership organizations utilize representation strategies to engage members and potential prospects. In section 3 of the Data Collection Process and Analysis, the research design assesses how effective the concepts of representation framework are. The researcher proposed a qualitative study that included research questions delivered to members of the organization as participants. Section 3 provides the necessary information to address the research design and how it supported the study. Responses were analyzed to determine current inadequacies and assessed participant perceptions to clearly identify any gaps-in-knowledge and areas for improvements. To do this, direct interview questions were asked to participants that encourages explanations of their lived experience for data collection and analysis, through a preferred method as stipulated in Section 3.

### Section 3: Data Collection Process and Analysis

#### **Introduction**

This qualitative study focuses on the critical success factors used to align growth and sustainability using its current framework, if any, to make decisions. Unsecured memberships directly affect funding as it is a primary source of revenue and jeopardizes the partnership's sustainability. Executive directors have experienced challenges related to the engagement and effective communication that aids in obtaining new members.

The purpose of this qualitative study was to investigate and identify determinates to encourage long-term sustainability within the professional membership association and provide the organization with a recommendation memo that outlines long-term sustainability. The board of directors serves as the oversight for the organization and ensures the nonprofit has sufficient resources to meet the nonprofit's mission. Notably, there was a gap-in-knowledge which failed to clearly identify the link between gaining new memberships and the inability to experience an onward incline.

The qualitative research process is an open and flexible design for researchers (Corbin & Strauss, 2015), and encourages the researcher to examine real-life context in an in-depth manner (Yin, 1994). Descriptive or explanatory questions are used to aim toward producing a first-hand understanding of people and events (Yin, 2004). The research questions highlight the existing internal issues and the inadequate strategies used to promote, produce, or encourage new memberships in the organization.



### **Practice-focused Question(s)**

The problem was that the lack of increased membership led the organization to consider all aspects of determinants for sustainability to improve organizational growth, brand awareness, community engagement and the potential for an enhanced service product. The purpose of this qualitative study was to investigate and identify determinates to encourage long-term sustainability within the professional membership association and provide the organization with a recommendation memo that outlined long-term sustainability and effective ways for membership growth.

The research questions highlight existing internal issues and the inadequate strategies used to promote, produce, or encourage new memberships in the organization.

1. What are the contributing factors causing limitation with membership growth and sustainability?
  - a. How well does the organization represent, substantially and symbolically, the interests of the members?
  - b. Does the organization provide programs and services that meet the needs of the members?
  - c. Does the organization adhere to any requests for changes to keep up with the expectations of the members?
  - d. Does the organizations demographic properly represent the target population?
  - e. Is the organization represented by any of the dimensions of representation to influence organizational sustainability? (See Appendix A)

### **Sources of Evidence**

The source of evidence used are direct interview questions asked to current members, executives, and board members which were analyzed. The relationship of this evidence directly provided insight to the problem(s) based on stakeholder responses. Those who were involved with the organization can provide feedback based on their lived experiences and overall perception of the organization service programs, communication, and other offerings. The qualitative research process is an open and flexible design for researchers and allowed me to examine real-life context in an in-depth manner. This qualitative study investigates and identifies determinates to encourage long-term sustainability within the professional membership association and provides the organization with a recommendation memo that outlines long-term sustainability and effective ways for membership growth.

A qualitative study presents data on perceptions and contexts and provides complex textual descriptions of how people experience a given research issues (Atieno et al., 2005). Direct interview questions are asked through an internet-based platform such as Facetime, Teams, or Zoom to each of the participants and is collected through the same platform initially used. Interviews are one of the four data collection models in qualitative research that allow the researcher to capture an explanation of a behavior or action (see Yin, 2016).

### **Evidence Generated for the Administrative Study**

Data collected includes the participant's thoughts and feelings on the organization's mission, operational strategies, communication efforts, and current services and programs.

#### ***Participants***

The participants involved in this qualitative study included current and active members of the professional membership association. Participants came from a pool of 180 current members with the nonprofit professional membership association. It should be noted that not all members participated; however, all members were invited and encouraged to do so to optimize the data collection process. Nonprobability purposeful sample is used for the target population. A nonprobability purposeful sample indicates that the subjects used in the study were not random (Trochim, 2006).

Solicitation is provided to members encouraging participation and feedback based on the provided interview questions. Participants were affiliates of the professional membership association either through a company, agency, or as an independent agent for their profession. The total number of requested participants was 15 to 20; however, ten volunteers were adequate for the purpose of sufficient data collection. The practice-focus questions were relevant to the participants given the direct involvement each has to the organization.

Each participant was affiliated with the organization for their own purpose; however, the intent was to uncover the reasons why membership was sought after, why membership is ongoing, or if at any point, contemplated discontinuing membership.

Research questions are for gaining an in-depth understanding of lived experiences by the participant and uncover the importance of the membership based on the participants years of experience, years in the industry, and affiliation with the organization.

### ***Procedures***

Participants are recruited through initial contact using the organizations internal platform to solicit for participation via consent form. After the participants consented to participate in the study, correspondence is made via email for any direct communication needs or understanding.

### **Instrumentation**

Depending on the participants preference and availability of platform, one of three interfacing platforms, Zoom, Teams, or FaceTime is used to conduct, record, and collect interview data. Each platform is used by smartphone or computer. Zoom offers seamless collaboration and has three components of security: protection of meeting, data, and authentication methods (Zoom, 2021). From an individual perspective, security overview includes tools to protect meetings, help manage participant activity and information sharing (Zoom, 2021). Communications are established by using Transport Layer Security (TLS), and meeting, webinar and messaging content is encrypted using 256-bit Advanced Encryption Standard (AES), with optional end-to-end encryption (Zoom, 2021). Designed policies and controls are implemented to safeguard the collection, use, and disclosure of information (Zoom, 2021).

Teams uses industry-standard protocols for user authentication wherever possible. Transport Layer Security (TLS) and Mutual Transport Layer Security (MTLS) protocols

provide encrypted communications and endpoint authentication on the Internet. Teams uses these two protocols to create the network of trusted servers and to ensure that all communication over that network is encrypted. All communication between servers occurs over MTLS (Microsoft, 2022). Teams' data were encrypted in transit and rest in Microsoft data centers. Microsoft uses industry standard technologies such as (TLS) and Secure Real-Time Transport Protocol (SRTP) to encrypt all data in transit between users' devices and Microsoft data centers, and between Microsoft data centers. Data in transit include messages, files, meetings, and other content (Microsoft, 2022).

FaceTime, by way of Apple, offers end-to-end encryption and protects FaceTime conversations across all devices. With iOS and iPadOS, calls are encrypted on devices making it inaccessible without a passcode. FaceTime is designed so that there is no way for Apple to access video calls when in transit between devices. Screen record data can be automatically deleted from the device after 30 days, a year, or kept indefinitely (Apple, 2022).

Network security for the three platforms included firewalls, access controls, logging, and auditing, along with encryption in transit. I also maintained the responsibility of security through participants use of passwords for controlled data. Each participant name was masked with fictitious names to maintain confidentiality.

### **Protections (Ethical Procedures)**

Any correspondence relating to data collection is chosen by the participant to ensure credibility. Credibility in qualitative research exists when the researcher ensures that data are properly collected and interpreted so that results are an accurate reflection of the world studied (Yin, 2016). Participants are kept confidential with fictitious names or

numbered accordingly to reflect the number they held as the participant, for example: Participant 1 was P1. Participant information were housed and stored confidentially in a personal computer that was password protected. All data collected were housed and stored similarly. Participants were advised that participation is “at will” and can withdraw from the study with no consequences.

The organization approved moving forward with the qualitative study and is aware that the willing members of the organization are considered participants. The organization has looks forward to the conclusion of the study, the findings, and the recommendation memo.

### **Strategies for Recruitment**

Ethical concerns related to recruitment materials and processes are addressed by maintaining confidentiality and privacy of each participant, maintaining honesty and integrity, and upholding informed consent. Relevant components of the questionnaire are conducted and captured for recording purposes. Each participant is advised that participation is strictly voluntary and is conducted without force.

### **Consent and Privacy**

Once selected, participant are provided with an informed consent form. The informed consent form outlined the participants' rights in the study, the estimated time required for participation, and the purpose of the study. Each participant was kept confidential by being provided with a fictitious name. All data collected are stored in a manner to maintain confidentiality and will be securely kept for an appropriate period, then destroyed.

**Client Organization Approval**

The organization provided approval to me to conduct the qualitative study and agreed to assist me with gaining access to the participants through the organizations' email blast notification to members. The organization notified the members and provided the researchers contact information. Should members opted to participant, they were encouraged to contact the researcher directly.

**Walden IRB Approval**

Participants included volunteers from the nonprofit professional membership association. Upon review of the proposal, the IRB gave me approval to proceed with completing the study and was provided with the IRB approval number 07-29-22-1039978. Members received notification via organizational email for research study solicitation to encourage participation. There were no ethical or bias concerns presented since I did not have any personal relationships with the members or organization beyond the research study. There were no participants who opted to discontinue volunteering in the study once initiated. Volunteers who expressed interest in the study with no follow-through was contacted two times for follow-up and to consent. After the second attempt, I discontinued any efforts to proceed with the unresponsive volunteer to prevent any pressure or discomfort.

**Analysis and Synthesis**

To complete the administrative study, the qualitative data analysis software Nvivo 12® was used for thematic analysis. Participant audio data were collected and transcribed

using Microsoft Word. Data integrity were maintained by undergoing numerous error checking and validation to ensure trustworthiness.

For data collection, tools used consisted of different video/ audio platforms – Microsoft Teams, Zoom, and FaceTime. One method was chosen by the participant for convenience and availability. To participate, each participant was required to be affiliated with the professional membership organization. To ensure participant validity, only current and active members of the organization were solicited to participate in the study to receive quality and worthwhile feedback. Initial contact made to the members as participants, consisted of providing information within the organizations monthly newsletter alerting members of the upcoming solicitation. For members participating in the study, consent forms were provided to each via email and outlined the required time needed for participation. The tentative timeline for collecting primary data was approximately over a 30-day period, depending on participants availability.

### **Analysis Systems**

NVivo 12 is a qualitative data analysis (QDA) software that provides the ability for researchers to organize, analyze, and determine insight in unstructured data such as interviews, survey responses, web content, and articles on a small or large scale.

### **Data Integrity**

Data integrity can be compromised through possible human error or any malicious acts. To prevent compromised or destroyed data, a checklist was followed to ensure all data had access controls in place, backed up, validated, and had any duplicate data removed.



**Credibility**

The researcher utilized network security to deliver questions to each of the participants to ensure encryption and is responsible for maintaining credibility and validity. Validity is the degree to which an instrument measures what was intended to measure (Maxwell, 1992; Watson, 2015), while credibility exists when the researcher ensured that the data is properly collected and interpreted so that the results are an accurate reflection of the world studied (Yin, 2016).

**Transferability**

Transferability in qualitative research study generalizes the findings in one situation may apply to others in a working hypothesis (Yin, 2016). Detailed accounts of participants, data collection, and analysis procedures was provided.

**Dependability**

Dependability was important to ensure trustworthiness by implementing documented procedures that provided consistent and repeatable findings to prevent possible biases. Dependability was obtained through notation of any changes and addressed any impact it may create.

**Confirmability**

Confirmability involves the credibility, transferability, and dependability. Having proper documentation of the responses and following the direction of the participant, rather than leading, allowed identification of any potential biases.

## **Analysis Procedures**

Interview data was captured using the selected method by the participant, then transcribed into Microsoft Word. Once an accurate transcript was developed and reviewed, it was imported into the qualitative data analysis software NVivo 12®, followed by being transcribed and categorized using thematic analysis. Thematic analysis is a qualitative research method for identifying, analyzing, organizing, describing, and reporting themes or categories found within a dataset (Braun & Clarke, 2006). Participant responses was assigned coding categories derived inductively from the data. Yin (2016), states that themes can be determined to identify any possible patterns in the data by using an inductive approach, which highlights any concept or theme. Each response was assigned specific coding according to the framework, which were categorized once transcribed.

## **Summary**

Executive directors experienced challenges related to the engagement and effective communication to aid in maintaining sustainability. The intent of this study was to determine if the concepts of representation (COR) framework can aid Executives and Board Members of the organization in making improved decisions that encourages a sustainable outcome aligned with the organizations mission, vision, and culture. To determine if the COR framework was suitable to implement for sustainability and growth, research questions were developed to tackle internal organizational issues and determine any inadequacies. A qualitative study focuses on perceptions and contexts

from peoples lived experiences and aids in the gathering of data derived from direct interview questions from participants via Zoom, Microsoft Teams, or FaceTime.

## Section 4: Evaluation & Recommendations

### **Introduction**

The purpose of this qualitative study was to investigate and identify determinates to encourage long-term sustainability within the professional membership association and provide the organization with a recommendation memo that outlines long-term sustainability measures. The general problem was the lack of increased memberships which has led the organization to consider all aspects for sustainability to improve organizational growth, brand awareness, community engagement and the potential for an enhanced service programs and products. The intent is to implement a framework that focuses on the different representation theories once used in democratic governance, to now be applied in a nonprofit professional membership organization. The framework suggests that the nature of representation within an organization is indicated by five dimensions: substantive, symbolic, formal, descriptive, and participatory representation (Pitkin, (1967) and Guo & Musso, (2007). The guiding question for this study was: What are the contributing factors causing limitation with membership growth?

This section addresses the research findings and steps taken to achieve it. This section also presents participant demographics, how data was obtained, sources of evidence, and recommendations the organization can utilize to improve growth, brand awareness, community engagement, and suggested ways to redefine their service programs and products.

## Demographics

Participants within the study were members of a nonprofit membership association. Participants had varying levels of education, professional experience, and years with the organization. Though the initial attempt for participants is 15 volunteers, data saturation is obtained after interviewing six participants; therefore, 10 participants was sufficient to conclude the interviewing process. Table 1 outlines participant demographics.

**Table 1**

*Participant Demographics*

Participant	Age Range	Gender	Race	Academic Degree	Years with IIASA
P1	51-60	Male	White	BS	10+
P2	51-60	Male	White	BS	10+
P3	65+	Male	White	None	10+
P4	51-60	Female	White	None	3-5
P5	51-60	Female	White	Associates	10+
P6	61-65	Male	Latino	BA	3-5
P7	31-40	Female	Black	MA	3-5
P8	61-65	Female	White	None	10+
P9	31-40	Female	Asian	BA	3-5
P10	65+	Female	White	None	10+

Data collected were from participants who are members of the professional organization. The criteria used to determine participants were (a) participants must be affiliated with the professional association and (b) participants must have a vested interest within the professional association. Participant interviews are scheduled and conducted between August 2 and August 24, 2022. Based on the participant demographics, most identified as White, 51 years of age and above, and had some type of higher education.

### **Sources of Evidence**

I partnered with the organization to have Solicitation for Participation (Appendix B) requests sent to members via email blast communication. Requests were emailed four times to the members. Members interested in participating were encouraged to contact the researcher directly to consent to being part of the study. Once a participant consent, the member is provided a copy of the interview questions for initial review and preparation, as well as a breakdown of the dimensions of representation (Appendix A). The source of evidence includes data collected from interviewees that opted to volunteer in the study. Data are captured through recorded audio of one-on-one interviews via the participants preference. Zoom and phone were the preferred method of choice and Zoom calls were recorded as audio only to conceal the identity of participants. Reminder emails were sent to each participant 30 minutes to 1 hour before each session to ensure the participants commitment to volunteering. Before each call, participants were notified that calls will be recorded for recordkeeping and transcribing purposes and that I will be the only person who has access to the recording. At the start of each call, I notified the participant that names and other specific identifying information should not be mentioned

once the recording was in session to ensure confidentiality. On average, the duration of each interview was between 10 to 14 minutes to collect sufficient data. Data collected are then transcribed into individual word documents, labeled P1, P2, P3... followed by being imported into Nvivo12 for review, and coded appropriately using the concepts of representation (COR) framework. Specific responses to the interview questions are coded as nodes.

There were no variations in the data collection plan as presented in Section 3. Unusual circumstance was the low rate of willing participants. Prior to the start of the study, many members expressed commitment and dedication to participating. However, when solicitation for participation was sent, members were not as eager or willing as previously presented. Table 2 outlines participants age, years of experience, and job title as part of the initial demographics collection.

Further review of participant demographics revealed that 80% of participants had more than 20 years of professional experience; however, a closer look revealed that participants averaged 37 years of professional experience.

**Table 2***Participants Age, Years of Experience, Job Title*

Participants	Age	Years of Experience	Job Title
P1	51-60	20+	CEO/ President
P2	51-60	20+	Producer
P3	65+	20+	Agency Owner
P4	51-60	20+	Account Manager
P5	51-60	20+	Other/ Operations Manager
P6	61-65	20+	Producer/ Agency Owner
P7	31-40	3-5	Account Manager
P8	61-65	20+	Producer
P9	31-40	1-3	Other/ Admin Assist.
P10	65+	20+	Account Manager

### **Findings and Implications**

The purpose of this qualitative study was to determine the perceived effectiveness of the COR framework used within the membership association. The focus of this study was to answer the research question: What are the contributing factors causing limitation with membership growth and sustainability? The sample collected reveal that most participants identified as White, female, with some to no higher education, above the age of 51, and has been with the organization more than 10 years. Furthermore, the sample indicate that there were gaps in the way specific age groups viewed the organization and



the quality of service and programs being delivered by the organization. Data also revealed that majority of participants within the age range of 51 to 60 are more likely able to sway the organization in ways that best fit their own desires and interests; therefore, directly encouraging or influencing specific programs, services, and social/ community engagement efforts.

### **Analysis of Data**

This qualitative research study includes a five-phase analytic approach of compiling, disassembling, reassembling, interpreting, and concluding, thus enabling researchers to move through phases in a non-linear fashion, moving through each phase as necessary (see Yin, 2016). Upon completing the interviews, the data were compiled to determine themes and codes from a thematic analysis approach. Compiling occurs when data are collected, which begins the informal analysis when data is arranged in a useful order (Yin, 2016). I developed codes and documented emerging themes based on the COR framework proposed, which included the dimensions of representation. This is done using the qualitative data software Nvivo12 to collect, categorize, code, and interpret the data once transcribed and imported into the software. Interpreting involves the analysis of the data as drafted (Yin, 2016). After analyzing, the data are then organized to determine any patterns or themes that may have provided conclusions. The final phase of data organization is concluding, at which time, final conclusions are drawn from the data (Yin, 2016).

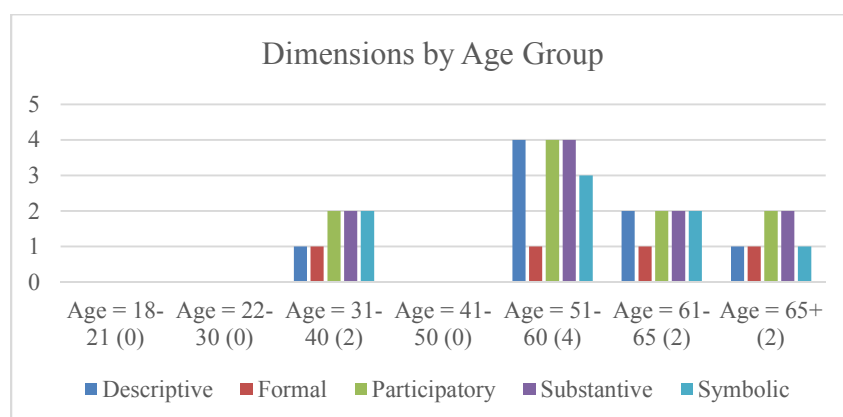
Some data revealed that most members within the age range of 51 to 60 believe the organization properly represents the members substantially, descriptively, and

participatorily. However, across all age groups, *formal representation* was the least noted and clearly indicates that members do not believe that formal arrangements are established to form leaders that involves the input of the members. Figure 1 outlines the participants view on how they perceive the organization by age group.

Based on the findings, the organization may not properly involve the members when selecting leaders, including the board of directors and executive leadership. Furthermore, members may not be involved in any voting processes or receive notifications and updates when leadership is changing.

**Figure 1**

*Dimensions by Age Group*

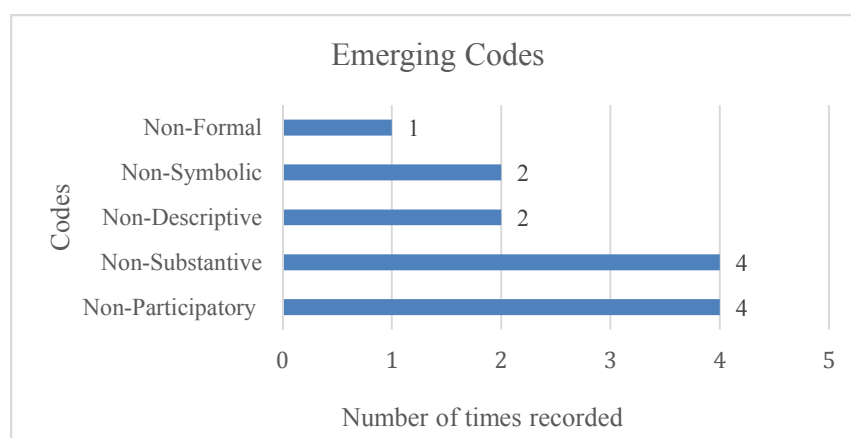


Other data began to reveal specific themes that did not correlate with the dimensions positively. In fact, data revealed that there were negative views as it relates to the dimensions of representation and was identified as nonformal, nondescriptive, nonsymbolic, nonparticipatory, and nonsubstantive. Some participants indicated that they do not know what the organization does, or that they have not heard from the organization in years.

The nondimensions were referenced approximately 13 times throughout the interviewing process. Nondimensions are categorized as themes developed from participant responses that did not correlate to the dimensions as outlined; therefore, reflecting as inadequate or lacking. Although there was an overwhelming number of references counted that positively reflected the dimensions of representation as previously outlined, it is worthy to note the emerging codes so that the ED and BOD can make necessary changes or revisions where needed. Figure 2 shows the emerging codes. Nonparticipatory and nonsubstantive are referenced eight times, which reflects that the organization does not act in the interests of the represented, and that there is no direct, unmediated, participatory relationship between the organization and its members. In addition to the non-dimensions, *unknown organization goal* was a new theme also noted.

**Figure 2**

*Emerging Codes*



Additional findings indicate that there is an increasing interest in members wanting to receive organizational information through other platforms. Though email/newsletter subscription communication presents to be the dominate choice, more

members are expressing interest in receiving valuable information and content across interacting social platforms. What was most surprising was that members across all age groups are interested in engaging with or receiving information via social media platforms. Social media consist of a collection of online services used to communicate and share content with stakeholder groups (Crumpton, 2014). While email/ newsletter is referenced mostly, it should be noted that this is in conjunction with interacting on other platforms as well. Members are interested in engaging with or receiving information from LinkedIn, Instagram, and Facebook, in conjunction with email/ newsletters. For example, P4 stated,

Instagram might be nice just to see pictures of people that are doing important things in the community that are connected to the [organization] would be good. Instagram allows for small comments to be made, not like with Facebook, which allows a lot more. So just seeing pictures of local agents and local representatives of [organization] would be fine.

YouTube, Twitter, and TikTok were least selected for unknown reasons.

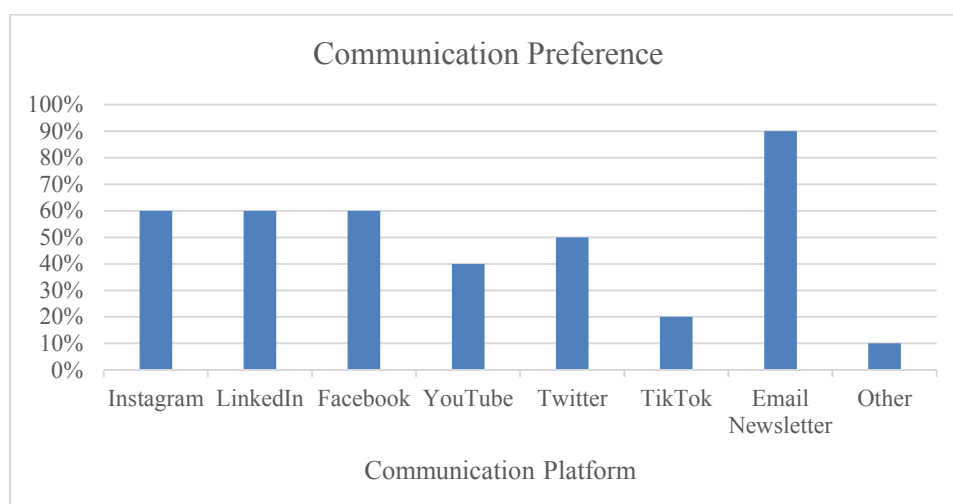
However, since these platforms are more recent, there may be lack of familiarity. Figure 3 outlines member communication preference. The *Other* option suggest for the use of the application WhatsApp to receive insight. Nonetheless, the use of social media in business and professional organizations today can assist leaders with successfully engaging with stakeholders.

LinkedIn, Facebook, and Instagram have been around longer and has become more widely used and accepted, providing ease and comfort for people 51 years and

older, making it more inclusive. The use of social media platforms can provide leaders with opportunity to engage with audiences beyond the traditional marketing channels (Henderson et al., 2017; Lillqvist & Louhiala-Salminen, 2014). Expanding the use of social media can encourage additional outreach within the community and inspire other prospects to join the organization.

**Figure 3**

*Member Communication Preference*



After an in-depth and repetitive review of the data, there were a few themes that began to emerge. Emerging patterns were then analyzed and coded as nodes to identify each of the themes. Reviewing participant responses indicated contradictory information and was outside of the questions topic, which created a thematic analysis, that later transformed into themes identified. Table 3 details themes and outlines direct quotes.

Based on participant responses, *Lack of Membership Substance*; *Unknown*

*Organizational Goals*; and *Lack of Solid Framework* were all themes identified. A sub-theme of theme 3 emerged that identified a specific age group that dominated that

sample. This sub-theme provides further validation that there is a lack of solid framework used since there is a dominance in one group. A brief discussion of the themes follows.

**Table 3**

*Emerging Themes*

Theme	Description	Quotes
Lack of Membership Substance	When discussing reasons for joining the organization, participant(s) noted that they only joined for their own personal agenda, or because of their employer.	<p>“A few of the agencies that I worked for were active with [Organization], and as an employee, I followed suit.” (P4)</p> <p>“I joined the organization as part of the membership that came with my employer. [Organization] offers opportunities to obtain CE credits. I believe that I benefit from the CE credits offered the most than any other service.” (P7)</p> <p>“[Employers name], my boss.” (Laughter) “I’m being honest.” (P8)</p>
Unknown Organizational Goals	The goals and values are unknown, or participants have not heard from the organization.	<p>“I think, so let me kind of give you an example, and I’m just rambling. I’m trying to give you honest information. So, I haven’t heard from the association. So, they did a program where they partnered with [BLANK] to do an intern training program in at [BLANK] and they were having a tough time, and they called me and ask if</p>

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		we could help, and I said absolutely. I love the program. That's the first time I've heard from them in 10 years. First time I've heard from the association in 10 years. I don't know what they do, and that's sad." (P1)
Lack of Solid Framework	When asked how well participants feel represented based on the dimension of representation	<p>"I don't know that it does very much considering that I know nothing about what they're doing. I literally, and I did go to some of their luncheons and stuff like that, and every once in a while, I'll get an e-mail blurb from them, but we get very little communication as to what they're doing. So, I don't, I don't know that they serve their members that well." (P1)</p> <p>I do not believe the [Organization] does the best that it can to represent the members with proper leadership. I think this can be revisited. (P7)</p>
Sub-Theme to Theme 3	When asking participants to identify their age range	Most participants noted above the age of 51. (P1, P2, P3, P4, P5, P6, P8, P10)

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### **Theme 1: Lack of Membership Substance**

When asking participants, "what were the contributing factors that encouraged you to join the organization?" responses did not reflect value, service and programs,

networking opportunities, or a reputable organization. Their response was due to filling a requirement to do their job and maintain licensing. Organizational goals or mission did not indicate to be a driving factor. Based on the responses, this revealed that members may not see legitimate value in the organization. Participants reasoning for joining the organization should be closely reviewed by the organizations ED and BOD. Some members are not joining because of brand awareness or community engagement, which brings to question how the organization is being perceived. Some are with the organization as a requirement through their employer.

### **Theme 2: Unknown Organizational Goals**

The organization believes it has made effective attempts to invite current members to programs, social and professional events, and presents itself as mission driven. However, attempts the organization has made may not have effectively aligned with the vision. Efforts made may not have been adequate to make current members aware of solid community engagement, promotion of programs and services, or any of the organizational goals. The organization may be struggling with assessing the importance of being mission driven and having positive and effective influence over its members. Members are paying annual dues to be part of a reputable association that offers value, and it is unfortunate for members to lose sight of internal and external resources, as well as experiences.

### **Theme 3: Lack of Solid Framework**

Data revealed that a solid framework either does not exist or is poorly implemented. Interviewing each participant revealed that there may be some disconnects



between the organization and its members. Participants occasionally noted that the organization did not represent them according to the COR framework, and therefore, were coded as *non-dimensions* based on this theme. It was assumed that the members would feel represented to some degree, but it was unexpected to uncover the thoughts and feeling of the participants that conveyed that they did not properly feel represented by the organization based on the proposed framework.

### ***Subtheme to Theme 3***

A subtheme of theme three emerged that outlined a specific pattern of age. Majority of participants identified above the age of 51, implying that a proper framework may not have been utilized to secure a diverse audience. Limiting the organization to a specific age group not only creates a major gap by driving a wedge in solid programs and offerings, but could create further sustainability issues.

There is a major gap in tenure, age, and diversity for those affiliated with the organization. Sixty percent of members that have been with the nonprofit membership association exceeds 10 years and have been in the insurance industry more than 20 years. The 60% of participants associated with those who falls within the age range 51-60, consequently have the most impact on the organization. If each of the eight age groups were split equally into two groups – ages 18 to 50 and ages 51 to 65+ – there be a major disparity identified between the two groups. Based on this finding, the organization will be unsuccessful with its attempts for sustainability if it continues this same course. The organization unknowingly caters specifically to one group of people, while finding it difficult to increase membership efforts for the younger audience and having wider

diversity. The findings also reveal that the 51 to 65+ age group believes that the organization represents its members substantially, descriptively, and participatorily. Though this was captured in the data, the findings further confirms that the organization believes that the mission directly correlated with the efforts taken to sustain the organization; however, those efforts only cater to and supports one group, not all – making it non-inclusive by excluding a larger group of people. When asked how the organization can improve efforts to increase overall participation, P7 stated,

Well, I think participation can increase by offering more options. Options that are more modern and allows for better integration of the members, while encouraging maybe new members. I think that if there was a younger crowd of leaders or an organization committee that specializes in community engagements, there would be increased participation.

Some participants believe that by continuing with its current strategies and offerings, it will help the organization with growth and maintain sustainability, while other members indicated that they did not know what the organization does outside of offering continue education (CE) classes. The same question asked to P7 was also asked to P3, which stated,

Perhaps better communication of activity opportunities and making the ability to participate more incremental rather than being required. So being able to participate in one activity or volunteer for a committee or do something else without having to make a tremendous commitment in terms of time and effort.

Both participants P3 and P7 falls within two different age groups. Both are interested in what the organization has to offer and encourages participation; however, both suggested that there could be improvements. The participants clearly identify the organization as one that promotes participation and community engagement amongst its members, though there are clear indications that improvements should be considered.

### **Interpretation of Findings**

The findings of this study indicate the need for a complete revamp of the organizational processes to increase engagement, marketing strategies, and recruitment efforts. Based on participants responses, the organization is not as diverse as they may believe it to be. Responses reveal that 80% of members identify as White. Some participants revealed that they once held a position on the Board, which further confirm the lack of diversity. A quick review of the Board of Directors profiles via the organization's website reveals that 10 of the 12 Board Members are white, with the other two members being profiled as Asian and Hispanic.

Furthermore, the findings reveal that there is a major age gap. One concern expressed by the ED was the organizations inability to encourage or recruit a younger group of people to join the organization. According to the National Association of Mutual Insurance Companies (NAMIC), over the next 15 years, 50% or 400k of the current insurance workforce will retire and less than 25% of the industry is under the age of 35. The insurance industry and organizations alike have done a poor job with recruiting millennials and other generations; therefore, making it difficult to entice the young professional to join professional membership associations. However, the organization

should explore ways to entice and encourage millennials and other generations to join, which could consequently bridge the gap in the age range. Proper representation of leadership can also assist with recruitment. If the organizations' goal is to increase membership and diversity, the organizations leadership should reflect inclusivity and younger people.

Additionally, the organization should reassess its mission. Participant responses revealed that 20% of members are unaware of what the organization does; therefore, directly correlating with the unknown mission of the organization. At the very least, the organizations stakeholders should know and understand the mission to be able to clearly identify if the mission aligns with the organization's deliverable to its members. This finding reveals that there are bigger issues operationally, as it ties in closely with being unable to effectively recruit, especially since the mission may not be understood by current and potential future stakeholders.

Lastly, the findings reveal that the organization does not effectively communicate with its members. The data suggest that members are interested in receiving information via email or newsletter subscription; however, data also reveals that members are receptive to other platforms. Data captured indicates that in addition to receiving email communication, 60% of members are interested in receiving organizational insight via Instagram, LinkedIn, and Facebook, in conjunction with email communication. Social media technologies have allowed leaders to engage in two-way communications (Lillqvist & Louhiala-Salminen, 2014), which is a growing interest amongst the members. Interestingly, though the data reveals that majority of members are 51+ in age,

this same group are open to receiving insight from other platforms – which debunks that social media communication is only an interest of younger people and will not be effective in older age groups. Leaders in nonprofits utilize social media to raise awareness, market programs and activities, and to maintain relationships with stakeholders (Campbell et al., 2014), as well as encourage engagement and collaboration efforts, regardless of the age group.

### **Unanticipated Limitations or Outcomes**

Unanticipated limitation occurred due to the number of participants that agreed to volunteer. While the initial request was for 15 to 20 participants to volunteer, the researcher was only able to secure ten participants to complete the research study. However, data saturation was reached despite experiencing limitations with the preferred number of volunteers. Potential impact on the findings may have higher or lower percentages of skewed demographics and preferences. Additionally, majority of participants were categorized within the 51 to 65+ age group. This may impact recommendations offered, as the data may disproportionately target one group.

### **Implications Resulting From Findings**

#### **For the Client Organization**

Commitment to the use of social media to expand on communication and engagement efforts with stakeholders can benefit the organization with its current members, as well as encourage potential prospects to join through recruitment efforts. Increased engagement, positive brand awareness, diversity efforts, and community partnerships can build stronger relationships within the professional industry.

Furthermore, by strategically pursuing and recruiting for a younger audience, the organization can easily connect those entering the industry with those soon exiting to assist with training and learning opportunities through substantive and symbolic collaboration.

### **For Positive Social Change**

Potential implications for positive social change include improved organizational practices that focuses on the needs for all members to provide advanced opportunities within the nonprofit professional industry. Conscious decision-making that properly includes diversified efforts can have a greater impact on the organization's sustainability measures, overall reputation, and commitment to inclusion. Taking a formal approach within the organization can encourage members, as they may feel inclusive to the organization with decision-making that affects all stakeholders and feel more of a commitment and responsibility to the organization.

### **Recommendations**

After completing the research, there are a few recommendations that the organization should consider to excel within the nonprofit professional membership space.

#### **Recommendation 1**

Modify Recruitment and Collaboration Opportunities. The organizations current strategy for recruitment and engagement is clearly outdated and does not account for today's climate of the way people receive information or interact. The organization should explore and determine the best way to connect with people beyond traditional and

outdated norms. According to the upper echelon theory in Hambrick and Mason's (1984) seminal work, these executives may make decisions on past success or what they have seen work rather than examining the new situation and environment. The organization has been existing for multiple decades and should not continue to operate today, based on yesterday's methods that were previously successful. Additionally, the organization should learn how to effectively collaborate and engage. This could be accomplished by operating in a substantive manner that is inclusive to all, and not only to one group that closely identifies with or represents the ED or BOD only. The organization will continue to struggle with sustainability and growth because it operates in an outdated cycle. Include options that are outside of the standard offerings, become more diversified and inclusive, and expand on communication efforts.

## **Recommendation 2**

Advance in Digital Marketing and Communication. There is tremendous value behind the effective use of social media for marketing and communication. The quick capability to 'share' between people, businesses, and other platforms can transform the organization to being perceived as one that is modern and able to effectively utilize tools to engage and promote. The researcher suggests implementing a social committee that are experts in community engagement via social media platforms. Chary (2014) suggests that leaders must develop content to attract an audience and it must be information worth sharing. Effective use of social media can provide opportunities to improve brand awareness strategically through content creation. The organization can provide medium level open dialog to receive insight and can view and mitigate negative comments about

the brand, while also being aware of areas that can improve. Chary (2014) further concludes that social media marketing is the effort that leaders can take to attract consumers, which includes customers willingness to share content with others to create brand awareness. Advancing with the use of social media provides the opportunity for the organization to descriptively engage by mirroring current and potential members characteristics.

### **Recommendation 3**

Hire Framework Professional(s). The organization can benefit from having a professional that specializes in organizational framework. A solid framework provides clarity and transparency for organizational progression. Having a clear and defined approach can support the organization in achieving its goals by incorporating best practices. Additionally, a solid framework can assist with deterring from only recruiting or sustaining members of a specific age group, making it more diverse and inclusive for all. Frameworks are for long-term use to instill permanent improvements in business processes. Based on member's needs and feedback, the organization can be positioned to implement the best framework that produces the desired outcome.

### **Strengths and Limitations of the Study**

This qualitative study was limited to the nonprofit professional membership organization. Similar research may be found in other sectors in Texas that may help generalize or further elaborate on the findings of this study. The recommendation for effectively evaluating and improving the needs of the organization is to partner with another local independent membership organization that is thriving and incorporate new



or redefined models. Additionally, obtaining a consultant that has relevant knowledge and experience in organizational restructuring, rebranding, and community engagement can sufficiently satisfy the organizations needs for sustainability.

Future projects suggest addressing refining the organization's current structure and strategies. Not only should community engagement and effective communication efforts be revisited and revamped, but the organization must operate in the most effective manner for outreach, recruitment, growth, and sustainability purposes.

### **Summary**

According to this research, it can be concluded that the Executive Director and leadership has limited knowledge on accurately assessing and/ or implementing an appropriate framework based on the participants responses. The COR framework can assist the organization in redefining their mission, while effectively targeting and including a wider range of diversity. The results also indicate that for the framework to be effective, an outside experienced expert in organizational framework be involved to properly guide and manage the organization to ensure that the framework remains at the center of decisions made. Decision makers attempt to frame the situation in proper context so that prior experiences can be leveraged in the decision-making process (Beach & Connolly, 2005). The Executive Director and leaders had basic knowledge of simple framework implementation for operational purposes within the organization; however, this have proven to be a false perception on the researcher's part. Section 5 of the study details the dissemination plan and deliverable method.

## Section 5: Dissemination Plan

The organization will decide how to manage the final dissemination. The dissemination includes an executive summary of the findings that each of the research participants will receive. A recommendation memo is provided to the organization that outlined key findings and recommendations that can be implemented for long-term sustainability and operational functionality, including refining services and programs offered, and community engagement efforts. The full study will be online via Walden University website, once published.

### **PAS Deliverable Described**

Upon completion, I produced a recommendation memo (Appendix D) that includes an outline of practical long-term investments for improved operational functionality. A recommendation memo is to outline the skills and abilities of the researcher, which clarifies the purpose and covers specific key traits, as identified in the collected data (Gibbs, 2012). The organization received tangible insight from the study that can be implemented to advance and fast-track the organization to achievable goals, based on member results. The memo included a summary that outlined recommendations based on the key findings. The significance of each finding was listed and detailed, including actions needed for correction or general improvement based on the representation framework and responses from the study. The memo explicitly detailed the cause of any challenges and offer potential positive outcomes should specific recommendations be used.

Dissemination of the research study, findings, and recommendations were based upon the organization's preference. I provided an executive summary to participating members. Participating members are those identified as volunteers that consented to participate in the study. The full recommendation memo was provided to the Executive Director (ED) of the organization, and to the current Board of Directors (BOD). Further dissemination of the recommendation memo and accessibility to the full study will be at the discretion of the ED and BOD to provide.

### **Summary and Conclusions**

The purpose of this qualitative study was to investigate and identify determinates to encourage long-term sustainability within the professional membership association and provide the organization with a recommendation memo that outlines long-term sustainability measures. The guiding question for this study was: What are the contributing factors causing limitation with membership growth? Evidence from this study present that there was never a solid framework used that focused on sustainability and recruitment efforts, and that the ED may have limited knowledge of effective community engagement, social collaborations, brand awareness, and member recruitment. Evidence captured in the study suggest that the ED's may want to consider examining the decisions that has been made thus far. To better understand why the organization is in the current position, the ED should assess what prompted the decisions initially made to avoid making the same or similar mistakes with their decision-making.

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### Appendix A: Member Interview Questions & Demographics Questions

Purpose: To explore member experiences and perspectives of IIASA nonprofit programs and offerings to determine the desirability, feasibility, and importance for future-oriented retention and sustainability. Interviews will be conducted virtually through one of the preferred and available platforms (Teams, FaceTime, Zoom) chosen by the participant.

Interview Time Commitment: 15 – 20 minutes

#### *Participant Demographics*

<b>Age</b>	<input type="radio"/> 18 – 21 <input type="radio"/> 22 – 30 <input type="radio"/> 31 – 40 <input type="radio"/> 41 – 50 <input type="radio"/> 51 – 60 <input type="radio"/> 61 – 65 <input type="radio"/> 65+
<b>Gender</b>	<input type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Non-binary
<b>Race</b>	<input type="radio"/> American Indian or Alaskan Native <input type="radio"/> Asian or Pacific Islander <input type="radio"/> Black, not of Hispanic origin <input type="radio"/> Latino/ Hispanic <input type="radio"/> White, not of Hispanic origin <input type="radio"/> Other
<b>Number of Yrs with IIASA</b>	<input type="radio"/> Less than 1 year <input type="radio"/> 1 – 3 years <input type="radio"/> 3 – 5 years <input type="radio"/> 5 – 7 years <input type="radio"/> 7 – 9 years <input type="radio"/> 10 or more years
<b>Academic Degree</b>	<input type="radio"/> Associates Degree <input type="radio"/> B.A. / B.S. <input type="radio"/> Master's <input type="radio"/> Doctorate <input type="radio"/> Juris Doctor (J.D.) <input type="radio"/> Other <input type="radio"/> None
<b>Number of Years in Insurance (career)</b>	<input type="radio"/> Less than 1 year <input type="radio"/> 1 – 3 <input type="radio"/> 3 – 5 <input type="radio"/> 5 – 7 <input type="radio"/> 7 – 9 <input type="radio"/> 9 – 12



	<ul style="list-style-type: none"> <li>○ 12 – 15</li> <li>○ 15 – 17</li> <li>○ 17 – 20</li> <li>○ 20 +</li> </ul>
<b>Current Job Title</b>	<ul style="list-style-type: none"> <li>○ Account Manager</li> <li>○ Producer</li> <li>○ Agency Owner</li> <li>○ Agent</li> <li>○ Adjuster</li> <li>○ Other/ Specify</li> </ul>

Dimensions of Representation

Formal	<p>Occurs when formal arrangements are established to form leaders selected by constituents</p> <p>Questions:</p> <p>Q1. What are the contributing factors that encouraged you to join the organization?</p> <p>Q2. How well does the organizations current demographics properly represent the target population to encourage or promote diversity?</p>
Descriptive	<p>Occurs when leaders of an organization mirror the characteristics of its constituents</p> <p>Questions:</p> <p>Q3. How well does the organization formally, descriptively, or participially interact with its members?</p> <p>Q4. How well does the organization current demographics properly represent the target population to encourage or promote diversity?</p>
Participatory	<p>Occurs when there is a direct, unmediated, and participatory relationship between an organization and its constituents</p> <p>Questions:</p> <p>Q4. How would you suggest the organization can improve efforts to increase overall participation?</p>

	<p>Q5. What platform(s) would be most beneficial to members to receive meaningful information? Why?</p> <p>a. Please provide the social media platform/ tool:</p> <ul style="list-style-type: none"> <li>○ Facebook/ Meta</li> <li>○ Instagram</li> <li>○ LinkedIn</li> <li>○ TikTok</li> <li>○ Twitter</li> <li>○ YouTube</li> <li>○ Email/ Newsletter Subscription</li> <li>○ Other</li> </ul>
Substantive	<p>Acts in the interests of the represented, in a manner responsive to them</p> <p>Questions:</p> <p>Q6. Which of the following two statements best describes the organization?</p> <p>a. The organization aims at only serving its current members and itself.</p> <p>b. The organization aims at soliciting new prospects while representing current members.</p> <p>Q7. In what ways does the organization represent, substantially and symbolically, the interests of its members?</p> <p>Q8. How does the organization utilize member feedback to design or modify programs and services?</p> <p>Q9. How does the organizations social engagements substantially represent its members?</p>
Symbolic	<p>Occurs when an organization is trusted by its constituents as a legitimate representative</p> <p>Questions:</p>

	Q10. How much trust do you have in the organization to be best represented? Why or why not?
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### Interview Questions

Q1. What are the contributing factors that encouraged you to join the organization?

Q2. Which of the following two statements best describes the organization?

- a. The organization aims at only serving its current members and itself.
- b. The organization aims at soliciting new prospects while representing current members.

Q3. How well does the organization represents, substantially and symbolically, the interests of its members?

Q4. How well does the organization formally, descriptively, or participially interact with its members?

Q5. How well does the organization utilize member feedback to design or modify programs and services?

Q6. How well does the organizations current demographics properly represent the target population to encourage or promote diversity?

Q7. How would you suggest the organization can improve efforts to increase overall participation?

Q8. What platform(s) would be most beneficial to members to receive meaningful information? Why?

- a. Please provide the social media platform/ tool:

- i. Facebook/ Meta
- ii. Instagram
- iii. LinkedIn
- iv. TikTok
- v. Twitter
- vi. Email/ Newsletter Subscription
- vii. YouTube
- viii. Other

Q9. How does the organizations social engagements substantially represent its members?

Q10. How would you, the member, like to be best represented by the organization?

## Appendix B: Request for Participation

### Request for Participation

Dear potential participant,

I am a doctoral student at Walden University, School of Public Administration, currently working on obtaining my Doctor of Public Administration degree. I am conducting a qualitative research study titled “Determinates for Sustainability: Nonprofit Professional Membership Organization in the Insurance Industry.”

The purpose of the study is to determine the perceived effectiveness of the concepts of representation theory framework in nonprofit membership associations. The proposed framework argues that the nature of representation within an organization is indicated by five dimensions: substantive, symbolic, formal, descriptive, and participatory representation. Pitkin’s (1967) concepts of representation theory was initially introduced to “contribute to the democratic governance by representing the interests of their constituents to the state”, however, authors Guo and Musso (2007) use the framework to apply it to nonprofit and voluntary organizations.

To conduct the study, I am inviting you to take part in a 15–20-minute interview. The organization will use this information to make internal improvements based on responses provided to better represent the agency and its members.

Thank you in advance for your time and consideration.

Sincerely,

Cindy Delu